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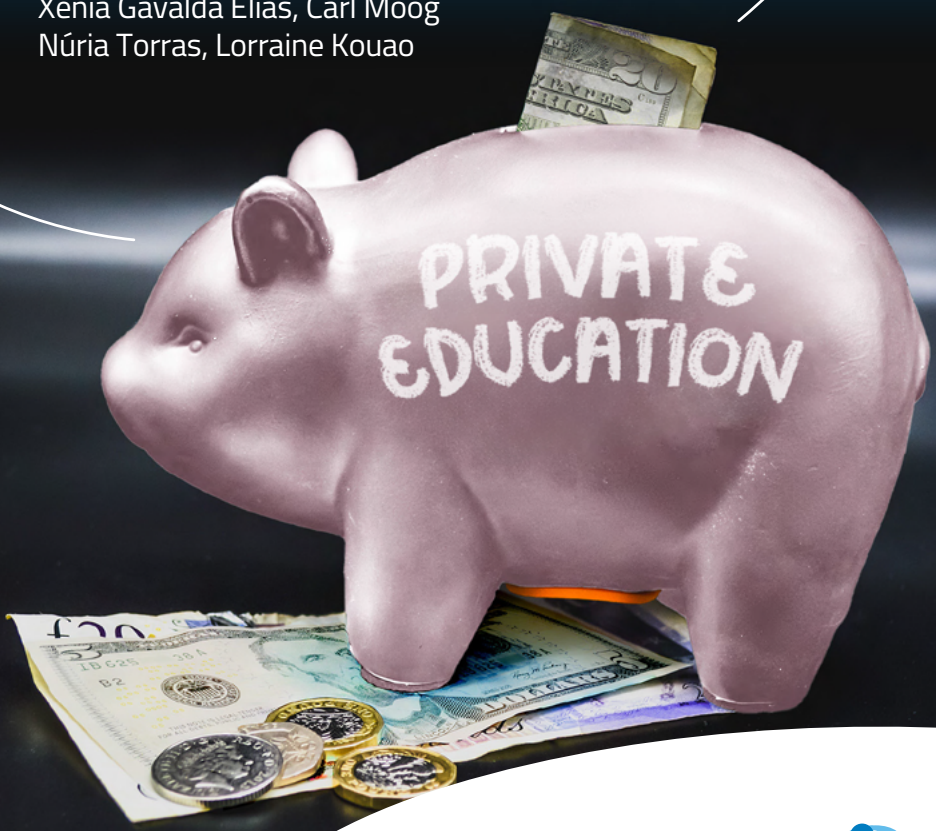
Trends towards privatisation in Latin America: Conditions of possibility and resistance (2013-2023)

Mauro C. Moschetti, D. Brent Edwards Jr.,
Xènia Gavaldà Elias, Carl Moog
Núria Torras, Lorraine Kouao



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Foreword

Within the framework of the Latin American Observatory of Educational Policy (OLPE), Education International Latin America (EILA) has developed a research process on educational policy in different Latin American countries with the support of researchers from the Universidad Autónoma de Barcelona's Department of Education Theory and History, the University of Hawaii at Mānoa, and the University of Oulu.
This work has made it possible to make available documents on the trends in education in countries such as Uruguay, Peru, Argentina, Colombia, the Dominican Republic, Honduras and Paraguay, which can be accessed on the websites of OLPE (www.observatorioeducacion.org) and EILA (www.ei-ie-al.org).

Using these documents as a basis, we present a text that lays bare the trends in education found in the different educational systems, in order to apprehend the behaviour of these processes in Latin America.

It is vital that our member organisations understand the commonalities between governments and their educational policies, as well as the international institutions that define educational policy in each of the countries in the region, in a context in which the prevailing trends are clearly oriented towards the privatisation and commercialisation of education in Latin America.

Combertty Rodríguez
Principal Regional Coordinator
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Introduction

Over the last decade, the education sector in Latin America has continued to follow the trend towards greater privatisation. Far from evidencing a radical transformation, the last decade has witnessed an intensification of the privatisation processes initiated decades ago and exhaustively documented in educational research (e.g., Verger et al., 2017; Gentili et al., 2009; Adrião & Pinto, 2016). Even so, the past decade has seen the introduction of significant novelties. On the one hand, there has been remarkable diversification in the policies and processes of privatisation, reflecting evolution in the strategies and approaches adopted by its proponents. At the same time, various forms of resistance to privatisation have emerged, mainly led by civil society organisations of various kinds. These developments underscore the existence of a complex, multifaceted panorama in the evolution of education in the region, with significant repercussions on aspects such as educational equity and quality. Drawing on the systematic review of the relevant literature, this report examines the multiple dimensions and consequences of these changes between 2013 and 2023, seeking to offer a comprehensive outlook on the evolution of the current challenges facing the education sector in Latin America.

The report highlights a process of increasing complexity in the ways in which educational privatisation is organised that coincides with—and for the large part is determined by—the development and penetration in Latin America of what Verger et al. (2016) have characterised as the expansion of a global education industry (GEI). The notion of industry is understood here in a broad sense, in that its actors not only participate in the provision of educational services, but also act as agents in the material and discursive production of educational policy. Thus, of relevance to the present study, the authors explain that:

> **The GEI is not simply an organic phenomenon in the economic sphere. Instead, it is shaped and enabled by public policymaking. But that policymaking itself is often influenced by the private interests in the GEI as they seek to set policy agendas, frame policy problems and refashion regulatory regimes to their advantage. (p. 2)**

Following this line of analysis, the approach taken to the study of recent trends in the field of educational privatisation in Latin America is based on a perspective highlighting the role of the actors involved in the production of the conditions of possibility enabling the advancement of privatisation. At the same time, the analysis presented

in this report is based on the need to approach current educational policies from a dual perspective: "as contemporaneously constituted policies" that are also "historically constructed processes" (Rhoten, 2000, p. 593). This implies recognition that, although these policies may seem to be recent or incipient in their current form, in fact they are the result of an evolutionary process influenced by historical, political, social and economic factors operating on local, regional and global scales. Rhoten (2000) suggests therefore returning our attention to the global-local conditions of possibility that enable change in the education sector. Thus, despite its focus on the most recent developments, the present study adopts a perspective that considers policies as "a complex series of changes that operate on several interactive levels, within several interrelated contexts and along several interconnected dimensions" (p. 597). This approach allows us not only to identify and analyse current trends in educational privatisation, but also to better understand its roots and historical evolution, which is essential to assessing its long-term impacts, foreseeing possible future developments and comprehending the resistance it generates.

Methodologically, this study is based on systematic review of the literature on the privatisation of education in Latin America published between 2013 and 2023. As detailed in the methodological section, search was made for the bibliography for this work using a complex syntax in the database *Scopus*. After successive rounds of refinement, 91 documents were selected that make up the final corpus for the study. The literature analysis strategy focused on extracting information helpful to understanding the progress of privatisation in the region, along with the responding resistance movements. Data analysis involved combining articles by privatisation type to carry out cross-sectional analysis identifying common themes (for example, types of private actors, privatisation policies, effects, and contextual factors influencing policy progress or inhibition, among others). This process then allowed extraction of a synthesis of the most significant trends.

The report is structured around the four major trends documented in the literature analysed. Firstly, privatisation processes through policy formulation are described: this section focuses on understanding the expansion of non-state actors in the formulation of educational policy. Discussion is structured by the type of actor, starting with the recently documented strategies of more traditional non-state actors, such as the United States Agency for International Development (USAID) and the Inter-American Development Bank (IDB). This is followed by presentation of the available evidence related to less studied actors, such as business coalitions, think tanks, corporations and philanthropic organisations. Secondly, analysis is made of the expansion

of so-called public-private partnerships (PPPs). This section discusses the different types of PPPs and their impact on educational provision, with evaluation of the way these partnerships have been presented as solutions to the challenges of educational access in the region's countries, and the way they have evolved over the last decade. The third trend analyses policies of autonomy and accountability. Examination is made of the evolution of the reform agenda as focused on school autonomy and market-oriented accountability systems based on performance. The discussion focuses on understanding how these systems have altered educational practices and school management in the region, promoting an outlook that focuses on efficiency and quantifiable results.

Finally, the fourth trend analyses the forms of resistance to privatisation, highlighting movements such as *Alto al SIMCE* (Stop SIMCE) in Chile, and other student and teacher initiatives that are fundamentally opposed to standardisation and performance-based accountability schemes. This trend reflects the efforts of various actors to counter privatisation and promote education as a public good. The final section offers a discussion of the intersecting elements of the trends identified, and reflects on their implications. Before going on to present the results, detail is made of the methodology adopted for the literature review.

Methodology

Literature search strategy

In order to carry out a comprehensive literature review on the privatisation of education in Latin America and the Caribbean from 2013 to 2023, an advanced search strategy was employed using the *Scopus* database. A combination of search terms was used to identify relevant articles, with the search syntax including terms related to a wide range of types of educational privatisation, including public-private partnerships, accountability policies, school autonomy, voucher systems and low-cost private schools, to name a few (see Appendix A). As these terms indicate, the objective was to find studies that shed light not only on traditional forms of privatisation (the privatisation of education, for example, through the growing presence of privately managed and funded schools), but also on more contemporary forms of privatisation (for example, through incorporating business rationale and principles into the management of public schools and public education systems) (Ball & Youdell, 2007). Consideration was also made of fact that the processes of formulating educational policy itself have been affected by privatisation, in the sense that the private sector participates increasingly and decisively in the development of public policy related to the field of education (Ball, 2012). Search terms related to this phenomenon were therefore also included. At the same time, and following the research approach mentioned above, the search syntax included terms that allowed the identification of studies addressing different forms of resistance to privatisation. Finally, it should be noted that literature was searched for in three of the languages used throughout the region, which predominate in the production of academic knowledge: English, Spanish and Portuguese.

The search results were refined to ensure that only those items produced during the time period of interest were retained. Additional filters were applied to remove research that was outside the scope of the present study (for example, research related to higher education and research related to other academic fields, such as medical education). Geographically, it should be noted that search terms were included for all Latin American and Caribbean countries.

Figure 1. Phases of literature search and selection criteria

Phase 1	**Strategy:** Search in SCOPUS. **Search terms:** Specific emphasis on privatisation trends and resistance to this in LATAM.	**Documents retained 190**
Phase 2	**Strategy:** A coding scheme was developed with approximately 8 categories to identify the main trend/s addressed in each article. **Search terms:** The search for key terms focused on 8 trends: school accountability, school autonomy, resistance to privatisation, public-private partnerships, policies on free choice of schools, government incentives for private schools, and low-cost private schools.	**Documents retained 109**
Phase 3	**Strategy:** Identify key characteristics of the trends, such as the actors involved, and the effects or results of the policies adopted. **Search terms:** Conceptual categories were created around the main trends.	**Documents retained 91**

As shown in Figure 1, the literature search was performed in three successive phases. Each phase was guided by a general conceptual approach (privatisation trends in education in Latin America from 2013 to 2023). In the first phase, the search syntax was executed in *Scopus* and an initial number of 738 results was obtained. Based on review of the titles and abstracts of each article, selection was made of those of relevance to the object of this study. Exclusion was made of book chapters and articles that did not focus on compulsory education (that is, K-12). Only those articles that analysed privatisation trends, policies and processes were retained; articles that studied only the results or characteristics of private schools were therefore discarded. As a result of the application of the filters in this first phase, 190 articles were retained.

In the second phase, PDF documents of all papers retained were downloaded. The articles were then codified and grouped according to their emphasis on different privatisation trends. During this stage, identification was also made of the names of the policies inves-

tigated and the period during which their development or implementation was studied. Articles that, on closer examination, did not meet the criteria established in phase one, were discarded. This second round of review concluded with 109 articles being retained.

In the third and final phase, the objective was to identify the key characteristics of the trends. This included analysing the actors involved, the fundamental characteristics of policies, and the contexts that facilitated or inhibited the development of trends towards privatisation. In addition, examination was made of the effects and results of these policies as broadly conceptualised. During this process, the articles were regrouped to ensure conceptual clarity and consistency with regards to the different privatisation trends. Studies that did not meet the conceptual and empirical criteria of the research were discarded. The final corpus consisted of 91 articles, which served as the documentary basis for the discussion of the various forms of educational privatisation presented in this report.

Literature Analysis Strategy

The analysis strategy focused on extracting information related to the main objective of this review: understanding the trends towards privatisation in the region since 2013, and how these have been countered by resistance movements. To achieve this, the articles were grouped according to privatisation type, and then cross-sectional analysis was carried out to identify common themes. These themes cover the types of private actors involved, the type of privatisation promoted, the effects and results of each type of privatisation, as well as the contextual factors influencing the advancement or inhibition of the privatisation type sought.

Characterisation of the literature

The literature collected represents a variety of countries, as shown in Table 1, which details the number of articles retained by country. It is obvious that the literary is strongly inclined towards certain countries. Due to their size and track record in privatising reforms, it is not surprising that Chile and Brazil represent more than half of the final sample, at 31 and 26 articles respectively. These are followed by Colombia (n=8), Mexico (n=6), Argentina (n=5) and Uruguay (n=4). However, as is common in the literature on Latin America in

general, there are fewer studies (or even none) related to the Andean countries, Central America and the Caribbean. The absence of studies focused on these countries does not necessarily imply that privatisation is not progressing there, but rather that is has received less academic attention, or that such attention has not generated research results in the academic journals indexed in *Scopus* in English, Spanish or Portuguese. These countries undoubtedly represent a key area for future research.

Table 1. Articles by country.

Countries	No. of articles by country
Chile	31
Brazil	26
Colombia	8
México	6
Argentina	5
Uruguay	4
Dominican Republic	2
Honduras	2
Nicaragua	1
Perú	1

Beyond geographical considerations, Table 2 presents the division of the articles according to the privatisation trends they describe: school autonomy and accountability (n=31); public-private partnerships (n=28); privatisation through policy formulation (n=20); and resistance to privatisation (n=12).

Table 2. Number of articles by trend

Trends	No. of articles
School autonomy and accountability	31
Public-private partnerships	28
Privatisation through olicy-making	20
Resistance to privatisation	12

In first place with 31 articles, the trend towards school autonomy and accountability emerges as the main focal point in the literature on privatisation in education. This is striking, as there are other more "traditional" forms of privatisation (such as private schools and voucher programmes) which have received more media attention and, in fact, more consideration from the unions. Nonetheless, the fact that this form of privatisation has received more attention during the period under study suggests that it is gaining ground. In other words, the face of educational privatisation in the region is changing and evolving towards privatisation in education (Ball & Youdell, 2007).

Secondly, with 28 articles, the trend towards public-private partnerships indicates that collaborative efforts between public and private actors have become more common, or at least have received increased academic attention. This reflects recognition of the complex interaction between different actors in the configuration of educational policies and practices. It should be noted that this privatisation trend includes multiple sub-trends, which are highly influenced by contextual factors. Strictly speaking, public-private partnerships do not develop in the same way in all countries, having specific characteristics in the different contexts studied.

Thirdly, with 20 articles, privatisation through policy-making highlights the prevalence of the participation of private actors in the formulation and dissemination of educational policy. As will later be explained, although this phenomenon has long been evident in the region, the production of knowledge in this area seems to have increased in recent years.

Finally, the twelve articles related to the trend of resisting privatisation show that privatisation in the region is not going uncontested. As this and previous studies have shown, privatisation often leads to unintended consequences, especially for the most vulnerable groups. It is not surprising that challenges and questions to privatisation therefore arise, which the academic literature seems to have echoed over the last decade.

Having concluded this brief characterisation of the literature under review, we continue on to the results section, where the characteristics and nuances of these four trends are more deeply explored.

Results

Privatisation through policy-making

EIn the last decade, literature on privatisation has highlighted the concept of privatisation through policy-making (Ball, 2012), which refers to the way in which an increasing number of non-state actors participate in and influence policymaking. Although this trend has certainly become stronger or more present since 2013, the participation of non-state actors in policymaking has a long history in Latin America. In the decades following World War II, it became common for a variety of bilateral and multilateral organisations to participate directly or indirectly in the development and dissemination of educational policy (Beech, 2011; Bujazan et al., 1987; Edwards, 2013, 2018; Edwards et al., 2023a; Edwards et al., 2023c; McGinn et al., 1979; Puiggrós, 1999; Reimers, 1991; Waggoner & Waggoner, 1971). The forms of influence taken up during that time are consistent with those observed more recently. Examples before and after 2013 include the allocation of financing (loans and subventions), the collection of data, the production of research, the provision of technical expertise, and the creation and facilitation of forums for learning and the exchange of political ideas, among others.

Nonetheless, significant recent developments have also occurred. The existing research shows, firstly, that a number of new types of organisations have inserted themselves into the processes of defining agendas and policymaking; secondly, that new country contexts have come in to play, wherein private actors previously did not exert much or any influence; and, thirdly, that new strategies or forms of collaboration have emerged between private actors and state counterparts. The rest of this section explains these recent developments. The discussion is divided by type of actor. First, analysis is made of the recent strategies of more traditional non-state actors, such as bilateral and multilateral agencies. The following sections discuss the available evidence related to less studied actors, namely business coalitions, think tanks, corporations and philanthropic organisations. The final section provides commentary from a broad perspective on how privatisation reforms in the region can be (and are being) promoted in a generalised way by non-state actors.

The discussion in this section is based on the review of 20 publications. These articles provide evidence related to the trend towards privatisation through policy making in seven countries: Argentina, Brazil, the Dominican Republic, Honduras,

Mexico, Nicaragua and Uruguay. Table 3 contains a summary of the main ideas documented in this section. Although the literature focuses predominantly on Brazil (n=11), incorporation is made of examples from the entire region to give an idea of the geographical dispersion of this phenomenon. Each subsection seeks to answer the following questions: Which organisations have been involved in policy formulation? How have they been involved? What types of education reform projects or approaches have they promoted and supported? What impacts and results (in general terms) have been documented?

Table 3. Privatisation through policymaking: An overview of actors and strategies

Type of Actor	Examples	Countries	Strategies
Multilateral and bilateral organisations	Inter-American Development Bank, German Agency for International Cooperation, Association for World Education, Organisation of Ibero-American States, UNICEF, USAID, World Bank	Brazil, Honduras, Nicaragua, the Dominican Republic	Collaboration with the state through educational sector working groups and round tables; financing for the development of educational sector plans; working with/through NGOs, PPPs (public private partnerships) and private actor networks; the provision of loans for educational projects; the provision of technical assistance
Business coalitions, think tanks	Honduran Council of Private Enterprise, American Chamber of Commerce	Honduras, Nicaragua, Brazil, the Dominican Republic, Uruguay	Creation and coordination of networks; collaboration with the state to monitor and analyze education and to develop educational policy and planning; promotion of their agendas through high-profile events; production and dissemination of research related to their priorities

Type of Actor	Examples	Countries	Strategies
Philanthropic organisations	Varkey Foundation, Fundación Hondureña de Responsabilidad Social Empresarial, Itaú Foundation, Instituto Unibanco, Lemann Foundation, Google, Inicia Educación	Argentina, Brazil, Honduras, Mexico, the Dominican Republic	Provision of services and resources (leadership training, professional development for teachers, hardware and digital technology); working with multiple levels of government and various types of intermediaries to create/take advantage of opportunities to participate and exert influence; resorting to international experience to develop credibility

Notes: The available research does not show that all actors are present or influential in all countries mentioned. This table offers selected examples based on the literature review; it does not constitute an exhaustive list of the organisations operating in the region.

Table 4. Privatisation through policy-making: Types of influence

Private Actor	Types of Influence
Multilateral and bilateral organisations	Guiding the political agenda Co-dependency between international organisations and governments Creation of new alliances with other private actors (business coalitions, think tanks, NGOs, corporations, private education providers, etc.)
Business coalitions and think tanks	Influencing "common sense" concepts of education: how the "problem" is defined and what solutions are considered appropriate. The networks and services provided by business partnerships and think tanks intersect with the work of international organisations, creating profitable opportunities, diverting funding from public education. Extension and reinforcement of networks and relationships that shift the centre of gravity of educational reform away from state institutions.

Private Actor	Types of Influence
Philanthropic corporative organisations	Corporate philanthropy reflects the type of influence found for the other private actors mentioned above, in addition to demonstrating influence with respect to: The formation of values and dispositions (for example, regarding the role and use of technology in education, or the nature and purpose of education, as utilitarian, technocratic, and mainly having the objective of forming human capital). Opening of the state: Gaining access to and influence in decision-making spaces within the state that were previously beyond the reach of external actors. The "philanthropisation" of consent: Using a combination of the previously mentioned strategies to secure consent for preferred policy reforms. Blurring of boundaries: shared principles, perspectives, professional backgrounds, and reform projects among key actors in the public and private sectors.

Note: Just as corporate philanthropy reflects the forms of influence listed for multi- and bilateral organisations, business partnerships and think tanks, the forms of influence of these other actors similarly reflect broader phenomena, including corporate philanthropy. This summary seeks to reflect the structure of the discussion presented in the main text. The summarised findings are derived from the literature reviewed for this study. Other studies may reveal additional or different results.

Bilateral and multilateral organisations

With regards to bilateral and multilateral actors, the literature in the sample focuses on four countries: Nicaragua, Honduras, the Dominican Republic and Brazil. Most of the notable organisations are traditional actors in the field of global education policy, namely USAID, the IDB, the German Society for Cooperative International Organization (GIZ), the World Bank and UNICEF. A new actor that has entered the scene in the mid-2000s is the Global Partnership for Education (GPE), a multi-stakeholder partnership that receives donations from international organisations and governments. The GPE uses these donations to facilitate political dialogue and to provide grants to low-income countries to support educational planning and the implementation of educational reforms (see Menashy, 2016, for more details).

As involvement type, these actors do not work in isolation nor exclusively in one-on-one formats with states. Rather, they participate in networks and collaborate with intermediaries (for example, NGOs). It is true that every international organisation has its own priorities and preferences regarding the types of projects they seek to support. Nonetheless, there is a clear trend in international development in recent decades towards greater cooperation based on the mutual interests of international organisations and the governments with which they work. The typical organisational arrangements through which these collaborations materialise are known as education sector working groups or round tables, which are either led by international organisations or co-chaired by these alongside government representatives. These groups serve as forums for dialogue between international organisations working in a given country, while facilitating direct interaction and conversation with the state about projects and possible reforms.

This type of cooperation and dialogue engaged in has been criticised for allowing "neither meaningful coordination with other donors nor genuine engagement with the Ministry of Education that would allow these organisations to influence the government's agenda" (Edwards et al., 2021, p. 1215). The above perspective was shared by a representative of an international organisation working in the Dominican Republic. It is likely that many international agencies working in the region no longer enjoy the kind of influence they had decades ago. This is not merely because governments now have more experience with such organisations and more capacity to negotiate with them, as this section of this report makes clear; they also have at their disposal a greater variety of organisations willing to provide support, so reducing their dependence on the financing or technical assistance that any given one may offer. To give an idea of the involvement and influence of these organisations, some brief examples of the types of projects supported by these organisations are provided below.

The main example comes from Brazil, where a project was initiated in 2014 between the IDB and the Manaus Municipal Secretariat of Education. The project focused on educational improvement, the financing for which amounted to 104 million dollars. Half of this came from the Municipal Secretariat of Education and the other half came from IDB loans, channelled through the Brazilian national ministry of education. The project sought to raise standards of excellence and improve students' academic performance through investment in infrastructure, management, monitoring and evaluation (da Silva Lima Aranha, 2019). It is very common for multilateral organisations to support such projects focusing on educational improvement. A common feature of this type of project is emphasis on the development and implementation of addi-

tional student performance tests and "new processes of selection and evaluation of teachers and administrators" (p. 10). In addition to these typical characteristics, this project stands out because one of its components, aimed at improving performance in early childhood education, is monitored by the Ayrton Senna Institute. This is of note in that this institute, a well-known private actor in Brazil, is a think tank that promotes neoliberal educational reform (Adrião & Silva, 2020). As will be discussed in the next section, this collaboration represents a clear trend throughout the region, in which traditional international organisations work with other types of private actors and, in so doing, create profit-generating opportunities for the latter.

Although recent research highlights such arrangements, the specific outcome of these projects and partnerships is still unclear in terms of specific activities and results; nevertheless, some general consequences can be highlighted. The first — not new to the region — is that international organisations may strongly influence the political agenda, and even veto plans developed by states when these are evaluated negatively by the organisation providing the financing. This was the case in Honduras when the GPE rejected the national education reform plan that it had required as a funding condition for its implementation (US$10 million). The external influence was further consolidated when the Honduran government turned to the World Bank for assistance to modify the plan in such a way as to be more acceptable to the GPE (Edwards et al., 2023b). A second result is related to the co-dependency that may develop between international organisations and states. This is especially the case in low-income countries such as Honduras, where, in the context of budget deficits and the chronic underfunding of education, the government relies on international organisations and other private actors to fill in the gaps left in public education systems that lack universal reach (Edwards et al., 2023b). The states seek financial contributions from these organisations while, at the same time, these organisations depend on working together with these states to increase their revenue and credibility. A third general result, mentioned above in the case of Brazil and discussed in the next section, is, on the one hand, the creation of new alliances between traditional international organisations and, on the other, the participation of a range of private actors; this includes private companies, business coalitions and think tanks.

Business Coalitions and Think Tanks

The literature has documented the activity of business coalitions and think tanks in Honduras, the Dominican Republic, Nicaragua, Brazil and Uruguay. Although business coalitions and think tanks are conceptually different, they are grouped under

the same category as, firstly, they often relate to states in similar ways; secondly, they propose similar types of reforms; and thirdly, business coalitions in practice may serve the function of think tanks, and vice versa. Despite the geographical spread of this tendency, common forms of influence are exhibited throughout the region.

It may be useful to mention some examples of organisations that fit into this category. As far as business chambers are concerned, the literature mentions the Honduran Council of Private Enterprise (COHEP), as well as the American Chamber of Commerce of Nicaragua (AMCHAM). This latter is "a Nicaraguan umbrella organisation of more than 15 private companies" (Webster & Sausner, 2017, p. 15). Three think tanks appear in the literature retained: Educa (the Dominican Republic), the Ayrton Senna Institute (Brazil) and Centro de Estudios de la Realidad Económica y Social (CERES, in Uruguay).

Although these organisations are not new to the region, the novel factor is the way they have begun to go beyond direct action and individual advocacy, funded by private businesses or donors. In particular, these organisations have begun to co-work and co-participate with states in the development of educational policies and programs. Two examples stand out. The first is the Iniciativa Dominicana por una Educación de Calidad (Dominican Initiative for Quality Education, IDEC), in which private and public sector networks intersect; the members of this initiative include both state and non-state actors, with the participation of international cooperation agencies, the business sector and civil society (although, remarkably, no teacher organisations; Edwards et al., 2021). The second example is known as the *Movimiento* (Movement) in Brazil, representing an alliance between the municipal government of Florianópolis, the Santa Catarina state government, and the private sector, and coordinated by Federaciones de Industrias del Estado de Santa Catarina (Industry Federations of Santa Catarina State). Thus, as in the case of the Dominican Republic, *Movimiento* brings together more than 2000 members, including representatives of business organisations, the state and civil society. The key to understanding both examples, however, is to note that these initiatives are largely coordinated or directly driven by the private sector (Candido, 2018, p. 14).

As mentioned, these organisations operate at the intersection of multiple networks and through multiple platforms and intervention spaces. For example, COHEP, in Honduras, "has recently become part of the 'Presidential Committee for Educational Reform'" (Edwards et al., 2023b, p. 642), which is in charge of establishing priorities and formulating the corresponding lines of action in the field of education. Mean-

while, in the Dominican Republic, the Dominican Initiative for Quality Education "serves both as a space to propose specific policies or plans for the education sector as well as a vehicle through which to monitor and evaluate the *enactment* of these policies and plans" (Edwards et al., 2021, p. 1217). *Movimiento* in Brazil works in a very similar way, as do individual think tanks in these and other countries, such as Uruguay. To a large extent, the above-mentioned collaboration dynamics appear to be decisively facilitated by the existence of overlapping networks of actors.

This last point leads to a second observation about how these organisations operate. In general, they all pursue a common set of direct advocacy strategies. These strategies include: promoting policy proposals that are aligned with their principles (discussed below); producing and mobilising research; collecting and sharing data and information with state decision makers (for example, related to student test scores or returns on education investments); and organising conferences, policy summits, and media events to raise the profile of their agendas. As described by Moschetti et al. (2020) in the case of CERES in Uruguay, this organization "deployed a series of actions in an attempt to reconfigure social perceptions around public education ... to place pressure on the political agenda of current and future governments" (Moschetti et al., 2020, p. 19). This was done through the creation of policy proposals, as well as through the organisation of "medium and high-profile events that could be understood as part of a networking or meeting strategy" (p. 19). Finally, CERES hosted conferences known as 'citizen encounters' across the country in 2017 to present its policy proposals for a range of sectors, including education. A key aspect of these strategies and events is that they are based on a technocratic mode of research and evaluation that gives credibility to the proposed policies.

The literature reviewed showed the proposals promoted by these organisations tend to favour reforms focusing on human capital, job training and education for economic competitiveness (Candido, 2018). They adopt the perspective that public systems do not provide quality education and that therefore reforms based on technocratic models of decision-making, privatisation and market principles (namely, accountability and competition) should be promoted. CERES in Uruguay, for example, has promoted school autonomy reforms, the creation of corporate-funded private high schools for students of low socioeconomic status, and publicly funded religious private schools (Moschetti et al., 2020).

Beyond the results of these specific policy proposals (further discussed in subsequent sections of this report), three common elements can be highlighted from

analysis of the action of business coalitions and think tanks. The first relates to the way in which these actors can affect 'common sense' with regards to education; that is, they can change the narrative on how the 'problems' are defined, and what solutions are considered appropriate to addressing these. Such organisations can thus contribute to changing the political preferences of the population. In Uruguay, Moschetti et al. (2020) report that the CERES events to promote their agenda "have had a great impact on the media and that, therefore, they have contributed to giving visibility to the diagnosis and the proposals made by these organisations" (p. 19). In systems that have traditionally not been conducive to privatisation, as occurs in Uruguay, this way of promoting the privatisation agenda is the only option available to pro-private actors.

The second element once again connects with and extends the example of the Ayrton Senna Institute mentioned in the previous section. This demonstrates the way in which projects promoted by traditional international organisations can intersect with business coalition networks and thus create opportunities for profit. In the case of Nicaragua, for example, it can be seen that the cooperation framework established by USAID around technical and vocational education created an opportunity not only for the participation of a well-known international NGO (Academy for Education Development), but also for an alliance with AMCHAM (a coalition of 15 private companies) in order to promote public-private partnerships in the country (Webster & Sausner, 2017). It is worth noting that these alliances have led, for example, to the development of the Red de Escuelas Modelo (Network of Model Schools) made up of around two hundred educational institutions. The nature and effects of these initiatives are, however, largely unknown and therefore represent an area of study for future research. What is relevant to the present study is that these organisations work together to create opportunities to advance private interests, with potentially significant implications for the financing and management of public education systems.

The third element to highlight is that such coalitions and collaborations can be facilitated by — and in turn can reinforce — close informal relationships in increasingly compact networks. Candido (2018) describes the networks in which the *Movimiento* participates in Brazil:

> **the state of Santa Catarina features striking characteristics such as an informality, camaraderie, associativism, and collaboration among political actors. The interview data illustrated that key actors in the state political arena attend the same events, easily communicate with each other, and share similar ideas. The**

> recurring reference to the same group of actors and the informal relationships among them, however, may indicate that such interactions occur inside a 'closed club', in which penetrating without a formal invitation or sponsorship from another member may be difficult. (p. 19)

Another way of thinking about this third element is using the term "network governance" (Triantafillou, 2004). In these arrangements, relationships between actors are not completely vertical nor horizontal (Ball & Junemann, 2012); relationships work, instead, through flexible networks and interdependencies (Olmedo, 2014; Rhodes, 1997). As discussed in the following section, network governance has also been seen to facilitate the participation of corporations and their philanthropic organisations.

Corporate Philanthropic Organisations

This section analyses the research published in 12 articles related to corporate philanthropy. The articles retained focus on five countries: Argentina (n=1), Brazil (n=8), Honduras (n=1), Mexico (n=1) and the Dominican Republic (n=1). Before presenting the key contributions observed, traditional philanthropy and new philanthropy are summarised to better orient the discussion that follows.

Traditional philanthropy refers to the way in which corporations have historically tended to provide charitable donations to needy populations, either directly or through the organisations that serve them. In the case of education, this involved channelling resources through school systems and various non-governmental organisations. In this context, donations constituted a form of "funding transfer from the private to the public sector" (Matovich & Cardini, 2019, p. 180). Corporations typically did not seek a return on their investment; in fact, donations were not strictly intended to be investments. Although some corporations might see donations — of school supplies, technology, food, or money — as an investment in corporate image, the logic of investment was neither applied in the sense of making a profit, nor in the sense of using business management principles to guide philanthropic activity. This has recently changed under the so-called new philanthropy.

New philanthropy is characterised by pursuing goals and operating in ways that contrast with traditional philanthropy. These involve, firstly, committing large amounts of funding for longer periods; secondly, different forms of participation and advocacy (cross-sectoral, networked, etc.) are employed as a means to guide policy direction; thirdly, incorporation is made of forms of evaluation, valuation and analysis that are

typical of the business world for decision-making processes on philanthropic actions; and, finally, the goal exists to find (or create) business opportunities enabled by the philanthropic activity (Ball, 2012; Ball & Olmedo, 2011; Saura, 2016). Given these characteristics, new philanthropy has also been termed venture philanthropy (Saltman, 2010) and philanthrocapitalism (Baltodano, 2017).

While the research reviewed for this study particularly highlights the role assumed by new philanthropy, it also refers to its coexistence with more traditional forms of philanthropy. In Honduras, for example, philanthropic organisations invest in educational infrastructure, such as the construction of schools (Edwards et al., 2023b/c). Other examples highlight the provision of services and resources for learning, such as: leadership training in Argentina (Matovich & Cardini, 2019); training of management personnel and the professional development of teachers in Brazil (Novaes et al., 2021; Tarlau & Moeller, 2020); and physical and digital technology (including computers and Google Classroom) for schools in Mexico (Ramírez & Gutiérrez, 2023).

Consideration of these examples might make the involvement of corporate philanthropy seem to be harmless or even beneficial. This is particularly the case when providing services to schools and school systems that need them. However, this traditional type of philanthropy focused on the provision of infrastructure, resources and services can hide other advocacy strategies that are often out of public view, but which undoubtedly have broader and deeper impacts on education systems. These broader, deeper forms of involvement and influence, discussed below, reflect the characteristics of new philanthropy.

A fundamental characteristic is the scale that corporate philanthropic organisations have at their disposal, both in terms of resources and networks. One example that stands out is the Varkey Foundation. Although the literature focuses on its activity in Argentina (related to the training of principals), it is only one of many organisations within the portfolio of the Varkey Group Ltd., registered in the British Virgin Islands and which, through its network of organisations, owns a range of international schools and companies specialising in educational services (Matovich & Cardini, 2019). Its network includes high-profile members such as Bill Clinton (former US President), Tony Blair (former Prime Minister of the United Kingdom), Bill Gates (founder and chairman of Microsoft), and Irina Bokova (former Director-General of UNESCO), among many other influential trans-sectoral actors (Matovich & Cardini, 2019 p. 182). Other examples include Inicia Educación, the philanthropic branch of the richest family in the Dominican Republic (Edwards et al., 2021), and the Lemann

Foundation, controlled by a Brazilian billionaire (Tarlau & Moeller, 2020). In all cases mentioned in the literature, philanthropic foundations are associated with wealthy and well-connected parent corporations, often banks or private investment firms (Novaes et al., 2021).

Perhaps not surprisingly, many of the strategies employed by philanthropic organisations reflect those already mentioned in previous sections in relation to other types of actors, namely the production and mobilisation of knowledge, the organisation of high-profile events, media presence, and network building with a wide range of actors such as government representatives, think tanks, and consulting companies (Adrião et al., 2017). To avoid repetition, a series of elements not highlighted in the previously discussed studies are presented below.

First of all, it is striking that many studies focus on philanthropic organisations that operate at the national and subnational level (Adrião & da Silva, 2020; Adrião et al., 2017; Adrião et al., 2022; Novaes et al., 2021), as opposed to international philanthropic organisations (such as, for example, the Bill and Melinda Gates Foundation). Interestingly, research has shown that philanthropic activity at the local level (that is, the municipal level) may be a preparation for a leap to the national level. In other words, corporate social responsibility related to specific projects at the local level can help raise the profile of a philanthropic organisation, which, in turn, will allow its entry into national policy formulation (Bittar-Godinho & de Lima, 2023; Matovich & Cardini, 2019). Much of the research analysing these initiatives at the subnational level comes from Brazil, perhaps predictably, due to its size and its federal political structure. Nonetheless, the reach of a few philanthropic organisations with a presence throughout the country on the subnational level is surprising. For example, the Itaú Foundation (the philanthropic branch of Itaú Bank) maintains alliances with 30 municipalities, while the Unibanco Institute ("responsible for the social investment of the private banking conglomerate Itaú and Unibanco", Adrião & da Silva, 2020, p. 6, own translation) claims to have alliances with ten of the 27 Education Secretariats, in four of the five regions of the country (Adrião et al., 2022). Similarly, Impulsiona, financed by a private investment company (Península Participações), has trained 145,000 physical education teachers in 49,000 schools in 5000 municipalities in all states of Brazil (Novaes et al., 2021).

The research further highlights that philanthropic foundations work through key intermediaries and seek political opportunities (Matovich & Cardini, 2019; Tarlau & Moeller, 2020). Key intermediaries are politically strategic actors or gatekeepers, typically

located within the government, who share a common orientation; that is, they are part of the same epistemic community, in the sense that they share a common approach when diagnosing the problems that afflict educational systems and the types of solutions they consider appropriate. In Argentina, for example, the introduction of the leadership training initiative promoted by the Varkey Foundation was facilitated by the fact that political allies at the national and subnational levels not only occupied essential decision-making positions, but also did so at the right time. In the words of the country director of the Varkey Foundation:

> **In its basis, this is a programme that the National Ministry brings to support provinces... It is a conjunction of necessity, opportunity and possibility. This means that there is a province that is able to receive this programme, that wants to receive it and that needs it. And it is not easy to receive this type of programme. Province Ministries are shaken up... This programme adds a lot of value, but you have to be willing to work a lot. (personal communication quoted in Matovich & Cardini, 2019 p. 189)**

These opportunities are crucial as they can serve as entry points from which philanthropic organisations can expand their involvement. This is exactly what has happened in Argentina, where the Varkey Foundation has expanded its leadership training institute to a total of five provinces, with at least 4,700 participants among school management staff.

Thirdly, the studies retained discuss the role of international experience. In some cases, this experience is borrowed from other contexts. For example, in Argentina, the Varkey Foundation adapted a leadership training program that had been designed in the United Kingdom. On this point, Matovich & Cardini (2019) explain:

> **Although the program had already been designed, the Foundation has focused on the programme's adaptation and a constant movement 'between London and Argentina'. Porres, Country Director, says, "The truth is that everything has been designed in London... We then worked with a team of fifteen specialists to 'Argentinize' it." (Matovich & Cardini, 2019, p. 193)**

Similarly, in the case of the national curriculum reform in Brazil, Tarlau and Moeller (2020) revealed that the Lemann Foundation organised a conference at Yale University with key speakers from the United States to endorse the need to develop — and the feasibility of developing — common state standards for education. Not only were

high-level Brazilian government representatives present, but later these emphasised the importance of this seminar to "boost discussion on [curriculum reform] in Brazil" (Tarlau & Moeller, 2020, p. 346).

While the experience of the Global North has historically been influential in Latin America, regional experience is becoming increasingly important. In the Dominican Republic, for example, a consulting company initially established by a philanthropic foundation has expanded its activities to now provide consulting services on the formulation of educational policy to governments of other countries, such as Colombia (Edwards et al., 2021). Although this is not a new phenomenon, there are not many studies available on the intra-regional experience characterising this trend; it therefore represents a relevant avenue for future research.

The remainder of this section focuses on the outcomes and impacts of corporate philanthropy. Undoubtedly, philanthropic organisations have laudable goals. For example, the Varkey Foundation's mission is to "improve the standards of education for under-privileged children throughout the world" (Matovich & Cardini, 2019, p. 182) and to ensure that every child has a "good teacher" (p. 182). Although it is difficult to criticise such aspirations, the methods and consequences of philanthropic involvement are likely to arouse concern among those who are worried about the growing influence of private actors in public education.

In many ways, the results of the involvement of philanthropic organisations reflect those discussed in relation to international organisations, business coalitions and think tanks. This is so much the case that philanthropic organisations also: (a) influence common sense with regards to those educational (and technological) reforms that are considered necessary and desirable; (b) create business opportunities for themselves (technically, for their parent corporations) and for other private organisations; and, (c) create and extend networks that decisively influence the processes of policy reform and the work of the state.

In relation to notions of common sense, the impact of these organisations is notable in the formation of equity. In this context, for example, Google has implemented a significant strategy of offering free online technology to certain private schools in Mexico. This action can be interpreted as an attempt to create a transnational community with shared technological experiences and preferences (Ramírez & Gutiérrez, 2023). Google, by providing these educational tools, seeks not only to encourage the adoption of its platforms, but also to cultivate future consumers.

Undoubtedly, these strategic alliances with governments allow Google to expand its user base. In addition, Google may be monopolising the technology market by positioning itself as the main interlocutor in the generation of national strategies for distance education (Ramírez & Gutiérrez, 2023, p. 256).

Mention can also be made of various examples related to the development of certain types of shares and the creation of profit opportunities. In Brazil, for example, Impulsiona offers a version of professional development for physical education teachers that is utilitarian, instrumental, focused on human capital formation and on the use of sport to develop strategic decision-making skills (Novaes et al., 2021). Also in Brazil, in a context in which state governments collaborate with multiple private actors, policies are being approved that create income-generating arrangements for private entities. Adrião et al. (2017) describe how, in the state of São Paulo, a number of corporations and their foundations are involved in the provision of "a set of products and services that involve standardised courseware, offering professional training courses for the use of these materials, systematic evaluation of schools and students, [and] virtual resources" (p. 329).

The literature reviewed resorts to three phrases to try to capture the implications of the participation of philanthropic organisations in educational policy. The first phrase focuses on the 'opening up of the state', which has occurred in parallel to the increasing involvement of philanthropic organisations. The second phrase refers to the idea of the 'philanthropification of consent', while the third phrase highlights the 'blurring of boundaries'. Although the elements that shed light on these three phrases are related, as can be seen below, they each reflect different aspects of the phenomenon.

Edwards et al. (2021) suggest that philanthropy in the Dominican Republic has contributed to the opening up of the state. In this case, the richest family in the Dominican Republic created a foundation, Inicia Educación, which has managed to associate itself with the state. While its parent company participated in traditional philanthropic activities until 2010, the new foundation represents the new philanthropy, as its activity focuses on identifying, creating and collecting data for the construction of indicators intended to help make resource allocation decisions in the education sector based on business principles (e.g. profitability). The foundation has strengthened historical relationships to become closely involved in the processes of making state decisions in the area of education. Remarkably, shortly after its creation, the foundation established a consulting company through which it could bid on income-generating projects (projects on which it would otherwise not be able to bid due to its non-profit

status). This complex process reflects the reconfiguration or the opening up of the state in terms of who is involved, how they are involved, and the values and metrics that guide decision-making" (Edwards et al., 2021, p. 1231).

For their part, Tarlau and Moeller (2020) propose the notion of the *philanthropisation of consent* to refer to the way in which the main philanthropic organisations can condition and guide the processes of educational reform through a combination of strategies. As described, the *philanthropisation of consent* implies that foundations:

> **Use material resources, knowledge production, media power and informal and formal networks to obtain the consent of multiple social and institutional actors to support a particular public policy despite the existence of significant tensions, thus transforming this policy into a widely accepted initiative. (Tarlau & Moeller, 2020, p. 338)**

This quote clearly refers to the cumulative influence achieved through multiple individual strategies. A key detail is that these strategies can neutralise significant tensions, including open resistance to the privatisation of policy-making. As explained in the research, the efforts of teachers and government actors to create national standards that are not aligned with the political movement lead by the Lemann Foundation were systematically ignored.

Finally, Matovich and Cardini (2019) warn about the "boundary-blurring between the public and private sectors" (p. 183). On the one hand, this blurring is observed in the public and private professional careers of the management personnel of the philanthropic foundations. Similarly, this blurring is notable in educational provision, such that it is no longer clear whether the education being provided is public or private. On this point, Matovich and Cardini (2019) warn:

> **[The Varkey Foundation] takes many of the responsibilities usually attributed to the state, such as teachers' and school managers' training. In addition, it is hired and supported by the state and it works on the structure: schools, departments, recruitment services, and so on. Nonetheless, it is not the state, but a foundation that claims to change lives through education (Matovich & Cardini, 2019, p. 190)**

Thus, lines are blurred not only in the policy-making process and in the values that guide decision-making, but also in the way the educational system is managed in practice. A byproduct of this phenomenon is that both actors are to some extent

protected from political conflict, since each can claim that the other is responsible (Matovich & Cardini, 2019). Together with the multiple ways described above in which philanthropic organisations contribute to and assist in policy formulation and in the provision of infrastructure, learning materials, training, etc., this paradox makes it not surprising that states do not view the increased involvement of these actors negatively (Tarlau & Moeller, 2020).

Conclusions

This section has shown that there are several types of actors that actively contribute to privatisation through policy-making. Although particular advocacy and private involvement strategies have been highlighted to a greater extent in research on one type of actor or another, commonalities exist. In fact, the three groups of actors presented in this section all seek to influence the educational policy agenda and they do so through common strategies (for example, knowledge production, media presence, event organisation, development and activation of networks, etc.). In addition, the three groups of actors seek to create income-generating opportunities for themselves and for other organisations in their networks. In all cases, the operational method consists of identifying a problem that cannot be solved by the state and for which the state must therefore divert resources to private organisations. In this way, the strategies of each type actor reinforce the others, even when there is competition between the actors to get contracts from the state.

Public-Private Partnerships

LPublic-private partnerships (PPPs) can be broadly defined as agreements between public and private actors for the provision of goods, services and facilities (Verger & Moschetti, 2017). In recent decades, their presence has drastically increased both in low-income and high-income countries, on the premise that they can offer higher quality education more efficiently. In low-income countries, PPPs have been presented as a miraculous solution capable of solving problems of access to education (Zancajo et al., 2021). The diversification of PPPs is a consequence of various political approaches, each based on different reasoning, which has led to the emergence of highly heterogeneous policy modalities. The overall interaction between the public and private sectors in hiring educational services therefore places PPPs in an “ambiguous policy category” (Verger & Moschetti, 2017, p.2).

The World Bank (2009) described PPPs in education along a continuum that involves varying degrees of collaboration between the public and private sectors. This spectrum goes from the mere existence of private schools, to the subsidising of these, the outsourcing of educational services, privatisation of the management of public schools, and the establishment of competitive financing schemes for both public and private schools (i.e. systems of universal vouchers). Academic attention in Latin America has focused mainly on the modality of PPPs related to the provision of education, such as vouchers, charter schools and subsidies for private schools. In recent decades, there has been a significant increase in private school enrolment associated with the proliferation of these PPP modalities in the provision of education (Verger et al., 2018). In addition, in some contexts, private school enrolment has also grown with the expansion of the so-called low-fee private school (LFPS) sector, which is increasingly linked to the granting of public subsidies and other material or legislative incentives and deregulation efforts that benefit this type of education (Siqueira, 2017; Moschetti, 2015).

In this section, discussion is made of the different PPP modalities that have received academic attention in the region. The literature reviewed here deals with four broad modalities of PPPs: voucher systems and other competitive financing mechanisms (n=8); charter schools (n=7); supply subsidies, incentives for private schools and other outsourcing formulas (n=4); and low-cost schools with government support (n=3). Another group of articles provides broader discussion of PPPs in the provision of education in Latin America (n=4), which have been taken into account in the structure and framework of the ideas presented here. Since most PPP formats are by now characteristic features of education systems in the region, the discussion in this section will focus on recent developments in the PPP-based reform agenda and their most relevant effects and results. A brief account of the reasons behind different PPPs involved in each particular case is provided in order to establish context. Finally, the last subsection discusses the recent push towards strengthening the regulation of PPPs as a response to concerns in terms of equity.

Voucher Programmes and On-Demand Financing Mechanisms

Voucher programmes can be considered as a type of public-private partnership that fully crystalizes the principles of school choice and competition (Verger et al., 2016, p. 86). Chile has been widely recognised for having one of the most privatised educational systems both inside and outside Latin America, mainly as a result of its national voucher system, which began in the 1980s. This subsection

analyses recent developments in the voucher system policy in Chile, as well as the outcome of attempts to transform this.

Several studies have investigated the history of the voucher system in Chile (e.g., López & Moreno, 2016; Mizala & Torche, 2017; Díaz, et al., 2020; Quintero-Fragozo et al., 2023). For many years, the Chilean system of school vouchers remained fixed, with all students receiving the same amount from the government regardless of their socioeconomic status. A first major reform introduced in 2008, called Preferential School Grants (SEP for the initials in Spanish), changed the old system of fixed vouchers to one based on the principle of positive discrimination. The new system allowed additional subsidies per student to be awarded to: (1) economically disadvantaged students (known as priority students); and, (2) schools with high concentrations of such priority students (Mizala & Torche, 2017).

In addition to contributing to the improvement of educational equity, it was expected that the new system would also improve student performance under the assumption that additional funding for priority students would mean better resourced schools. However, the results of the 2009-2016 Sistema Nacional de Medición de la Calidad de la Educación National (National Education Quality Assessment System, SIMCE) of publicly funded municipal schools showed that SEPs have not been effective in improving the academic performance of students despite an increase in resources (Oyarzún, 2023). Although this did not translate into better academic student performance, schools that already enjoyed higher prestige, with better human resources and organisational practices before the introduction of SEPs, used the additional public funding to improve their school management processes and teaching activities (Oyarzún, 2023). Nonetheless, in the case of private charter schools serving disadvantaged students, Mizala and Torche (2017) found that SEPs had a significant positive impact on math and language performance. Using time-distributed fixed-effect models, this study compared the average scores of fourth-grade SIMCE standardised tests from before the SEP (2005-2007) with post-implementation ones (2008-2014) (Mizala & Torche, 2017). Even so, it was not possible to affirm causality in the phenomenon. The results of the study may be affected by the socioeconomic status of students' families.

A second major reform aimed at reducing the negative effects of the voucher system was constituted on the passing of School Inclusion Act No. 20845, introduced in 2015. By the 2010s, the voucher system had reached significant levels of unpopularity, largely as a result of the sustained criticism it faced for weakening

the public education system, favouring certain students in admission processes, and making access to better educational opportunities depend on families' capacities to make co-payments (Díaz et al., 2020). In response to this, the new law was supposed to address the deficiencies generated by the educational market and the existing competition.

Despite the widespread recognition of the negative effects of the voucher system, the private education sector in Chile has continued to grow. In 2015, at least 133 new private schools had opened, while 420 municipal schools were closed between 2008 and 2013. Urban communities are the most privatised, with less than 20% of enrolment in public schools. Most of these private schools are under the control of religious groups, notably the Catholic Church, and of large investors (for example, the Asociación Gremial Colegios Particulares de Chile) (López & Moreno, 2016). In addition, school segregation remains a widespread obstacle to educational justice. Students from disadvantaged backgrounds tend to be hyper-segregated in the Chilean education system. Recent evidence confirms that strong residential stratification in Chile is one of the main factors negatively influencing student performance (Oyarzún, 2023; Quintero-Fragozo et al., 2023). At the same time, municipal schools tend to have a higher concentration of priority students (Oyarzún, 2023; Quintero et al., 2023).

Charter Schools

Charter schools are state-run, publicly funded schools that are managed by private actors (Termes et al., 2017). The literature on charter schools in Latin America focuses largely on the case of Colombia. The charter school program known as Colegios en Concesión (Concession Colleges, CECs) began in Bogota in 1999, and has been globally lauded both academically and politically, including by organisations such as the World Bank and the Inter-American Development Bank. Termes et al. (2017) state that the Colombian model is considered the most traditional and emblematic charter school program in Latin America (p. 913). However, the benefits of this programme are far from clear, as will be discussed below. The recent literature on which this section is based addresses the main impacts and the major deficiencies of the CEC program. This evidence is categorised below according to the supposed benefits most frequently associated with the charter school model, these being autonomy, innovation and accountability, and student performance.

Autonomy

The CEC programme involves the recruitment of private schools and other private organisations to run charter schools located in marginalised areas. Under this programme, the government has established that these schools may only be managed by Charter School Management Organisations (CMOs), these being private entities with expertise in educational services, such as private schools, religious organisations, and charitable societies (Edwards & Hall, 2017). Before 2013, CECs covered only 4% of all students in Bogota, with fewer than 40,000 students enrolled in 25 CECs (Edwards et al, 2017).

Evaluations focusing on the period prior to 2013 have documented that CECs enjoy much more autonomy in terms of general management (e.g. teacher recruitment) compared to public schools (Termes et al., 2017). Edwards and Hall (2017) analysed personnel hiring and management strategies, as well as those used for the acquisition of resources. This study shows that charter schools in Bogota have autonomy to hire non-unionised teachers and establish stricter hiring requirements, while offering lower salaries compared to public schools, leading to high staff turnover rates (Edwards & Hall, 2017). This situation is also observed in previous studies that highlight the fact that working conditions in charter schools are worse than those of public schools (Termes et al., 2017).

Innovation and Accountability

Although the working conditions of teachers in CECs are worse, school infrastructure and services, such as libraries, laboratories and health services, tend to be better than those of public schools (Termes et al., 2017). Even so, despite having better facilities, CECs still do not seem to have fulfilled their promise of promoting pedagogical innovation. On the contrary, research has shown that these schools tend to adopt traditional approaches that emphasise basic practical knowledge, with standardised tests being the main instrument used when evaluating the performance of these schools. Furthermore, accountability practices through standardised test results tend to generate opportunistic behaviours within charter schools, such as the deployment of teaching strategies focused on preparation for such tests (Termes et al, 2017).
Furthermore, Edwards et al. (2017) explain that the principles of accountability and competition are not verified in practice for the CEC programme for two reasons: first, due to the small number of charter schools compared to the total number of schools; second, due to their unique organisational and political characteristics. With regard to this point, the research warns about the difficulty of expanding the CEC programme because there are very few CMOs that are willing to manage them as a consequence

of the strict requirements imposed by the government in the bidding process, along with the meagre funding offered per enrolled student (Edwards et al., 2017).

Student Performance

One of the key aspects of the CEC programme has to do with the fact that participating schools aim to achieve higher performance levels than public schools in the same area. Termes et al. (2017) analyse several studies that claim that CECs attain better scores on standardised tests (see also Edwards et al., 2020). Their analysis reveals that the differences in performance between CECs and public schools are not statistically significant after controlling for the length of the school day (the school day in CECs is 8 hours, against 4 class hours offered in traditional public schools) and the socioeconomic status of students (Termes et al., 2017). In fact, multiple regression analysis indicates that the length of the school day and the socioeconomic status of families are the most influential variables when it comes to predicting performance, well above the type of school. Along the same lines, Edwards et al. (2020) warn that findings on the supposed better performance of students in charter schools should be interpreted critically, due to the lack of adequate controls and the structural differences between both types of school.

Subsidies, Incentives and Outsourcing Formulas

Within the educational sector, PPPs adopt several modalities, under which private suppliers receive direct or indirect public financing in exchange for the provision of education and other related educational services. Supply-side subsidies are one such modality. These are usually conceived as a financial incentive to encourage private investment in educational initiatives that would otherwise be financially unsustainable. In addition to these subsidies, the literature refers to other mechanisms that point in the same direction, such as tax exemptions and deregulation. The objective in these cases is to reduce operational barriers for private actors involved in education, so encouraging their participation. On the other hand, when systems face scarcity of resources, the outsourcing of student placements to private schools appears to be a viable solution to alleviate supply deficits. In addition, private sector outsourcing of the management of educational programmes and comprehensive services is also usually justified as an attempt to incorporate the experience and supposed innovation inherent to the private sector under accountability regimes that supposedly guarantee effectiveness and transparency. This section deals with these types of PPPs in education.

Supply-Side Subsidies

In many Latin American countries, private schools have benefited from decades of public subsidies, especially in the case of religious institutions. Subsidies have been implemented with objectives that may range from improving accessibility and quality to ensuring the balanced allocation of resources between different educational providers (Patrinos et al., 2009). Supply-side subsidies are usually not intended to stimulate competition between schools nor to directly mimic market dynamics, unlike demand-side subsidies such as voucher programmes (Verger et al., 2020). Supply-side subsidy schemes are not structured as competitive mechanisms in which financing is allocated strictly according to demand. Consequently, there is not always an obvious relationship between the number of beneficiaries and the funding that is allocated to private educational institutions (Sandiford, et al. 2005).

The widespread existence of supply-side subsidy schemes in Latin America contrasts with the lack of research on the changing nature of these arrangements and their results. One exception is found in recent studies focused on the case of Argentina, which address the evolution of student enrolment in subsidised private schools. Private schools have been beneficiaries of formal state funding since the 1940s, and although they have traditionally served a relatively small stable percentage of the total enrolment since the mid-1990s, some studies show that since the early 2000s subsidised private schools have become an option for a low-income sector of the population (Gómez Schettini, 2007; Gamallo, 2011). This is especially the case in large urban areas (Gamallo, 2011; Moschetti, 2015). The research suggests that increased enrolment of children from the lowest income quintile in private schools may be a consequence of a number of factors, including an increasing perception of the low quality of public schools, reduction of relative costs thanks to the expansion of the subsidy system, and rapid demographic changes that have overburdened public schools.

It is essential to deepen investigation into this type of publicly funded private provision of education, which is often relegated in research priorities due to its being naturalised within the educational structure of countries in the region. The existence of private charter schools is taken for granted in many contexts due to their historical presence associated with the origins of educational systems, the institutional agreements that protect them, and their deeply rooted presence in educational communities. However, recent studies in Argentina have posed questions without conclusive answers about the supposed complementary function of such schools (Moschetti, 2015). The implications of these dual systems of educational provision are worrisome, especially with regards to educational equity. Do these

schools offer genuine opportunities for upward social mobility or, on the contrary, do they reinforce socioeconomic stratification?

Tax Exemptions and Deregulation

Tax exemptions for private education serve to indirectly provide incentives to families to choose private schools, so ultimately encouraging the expansion of the private sector. Recent research on the case of Mexico explains that the increase in student enrolment in private schools can be attributed to the prevalent belief that private education improves students' prospects of gaining admission to public universities (Espíndola, 2016). In this context, President Felipe Calderón's government proposed reduction of the cost of tuition fees in private schools after recognising the double financial burden for families opting for private education. The reasoning behind this decision was that these families are in a sense 'paying double' in paying both tuition fees and taxes related to public education funding. This resulted in the passing of a presidential decree exempting families opting for private schools from paying VAT, a measure justified by the argument that it compensates those who were effectively paying twice as much for education (Espíndola, 2016, p. 9).
Similarly, in Uruguay, a specific argument arose from the perception of state inefficiency and a criticism of public schools as being too uniform. In response to these concerns, the Uruguayan government, while maintaining its central role in the provision, regulation and evaluation of education, also began granting tax exemptions to private companies that invest in education. In this context, private foundations have begun to play a more important role in educational provision. In addition, these foundations have become increasingly involved in the development of social programmes aimed at students from vulnerable contexts through programmes to prevent school dropout and digital equity, all of which receive state funding through tax exemptions (Pereda, 2019).

Nonetheless, especially in the case of Mexico where tax exemptions are aimed directly at families, the application of such benefits reveals an underlying disparity. Although they are designed as a relief measure for low-income families, they predominantly benefit middle- and upper-income families that have the means to capitalise on such incentives, which may intensify socioeconomic inequalities. Consequently, the poorest families, with fewer possibilities of paying for private education or of benefiting from tax deductions, are at an additional disadvantage, highlighting the role of this policy in perpetuating and aggravating existing social inequalities.

A related approach aimed at encouraging private participation in education arises from different forms of deregulation. Deregulation can, for example, create indirect finan-

cial incentives that encourage the participation of the private sector. As the case of Peru shows, deregulation can be as effective as direct subsidies in promoting the expansion of private education. In Peru, this phenomenon began with the promulgation of Legislative Decree No. 882 in 1996, which aimed to promote private investment in education by eliminating regulations considered to be bureaucratic restrictions, while granting tax exemptions to private education providers (Díaz-Ríos et al., 2021). The regulations included fewer restrictions on school fee amounts, on curriculum design, and on teacher salaries and benefits. This combination of deregulation and tax exemptions has boosted the growth of private schools throughout the country, especially in large urban areas where demand allows economies of scale for private providers.

However, as mentioned, this rapid expansion has also caused concerns about potential increases to educational inequality, as those with greater resources may have access to a wider range of educational options, which may exacerbate social divisions. In light of these developments, recent research in Mexico and Peru shows how tax exemptions and increased private investment enabled by deregulation policies have led to greater inequality and segregation, with the poorest families benefiting the least from this new structuring of educational provision. Studies in Peru have shown that the country experienced a significant increase in school segregation by socioeconomic status (Carrillo et al., 2021).

Outsourcing of student placement

In some countries, the state subsidises private education providers by directly contracting student places in private schools in order to address public schools' lack of installed capacity. This model, in which the state hires private schools to meet the demand for public education, is mostly observed in Colombia. This system allows the expansion of educational access in areas where public schools may be saturated or non-existent, ensuring that more students can access education without the need for the state to build and operate new public schools. This approach is particularly used as a strategy to respond quickly to educational needs in regions facing rapid population growth and infrastructure challenges. In the context of Colombia, the state maintains the power to define and establish goals and criteria to evaluate the performance of the contracted schools, while these reserve the autonomy to hire staff and choose pedagogical methods, among others.

According to Díaz-Ríos et al. (2021), the Colombian regulatory framework for state supervision of the contracted schools is very unclear. In addition, the supervision of these contracted schools is usually poorly carried out, with responsibility for this of-

ten being delegated to municipal governments. Thus, contracted schools have benefited from deregulation, but the lack of centralised control in decision-making has led to an uncontrolled increase in low-quality contracted schools characterised, among other things, by high turnover of students and low student performance.

In 2001, the state introduced regulations to gradually correct these challenges. The establishment of eligibility criteria based on quality and a track record of experience eventually resulted in the creation of a "pool" of private schools qualified to be contracted in case of scarcity of places in the public sector. In addition, the state opted to harmonise the budget allocated to contracted schools, using the cost per student in the public sector as a cap on the price to be paid for contracted places in private schools. Finally, the new regulations stipulated that the mechanism for contracting student places should only be used in specific geographical areas where public schools could not cope with demand.

Despite the *enactment* of these regulatory mechanisms, students attending contract schools continue to obtain lower scores on national standardised tests compared to students enrolled in public schools. This indicates that accountability measures alone are insufficient to guarantee the provision of quality education by private schools, which tend to hire untrained teachers and have higher student-teacher ratios (Díaz-Ríos et al., 2021). In turn, despite the expectation for the regulations to control the growth of contracted schools and to increase their performance, the implementation process has revealed challenges at the local level. After analysing two different municipalities in Colombia (Bogota y Cali), Díaz-Ríos et al. (2021) revealed that the factors that are meant to determine the effective control of contracted schools depend on the technical capacity of the public administration and the existence of adequate information systems to monitor their performance. In Cali, poor regulation resulted in a vicious cycle of increasing contracts with low-quality schools, as well as weak technical capacity to monitor their operation and results. Unlike Cali, the government of Bogota displayed greater technical capacity, with greater emphasis on performance control, adequate information systems and constant monitoring of contracted schools. This greater capacity has allowed the government to obtain accurate information, to avoid financial penalties from national authorities, and to terminate contracts with private schools that do not meet the required standards (Díaz-Ríos et al., 2021).

The Contracting of Programmes and Services

Another form of public-private partnership in education comes from schemes that involve contracting the private sector for the provision of complementary programmes and services. In this context, although the literature also refers to the growing trend of outsourcing curriculum development and teacher training in countries such as Argentina and Uruguay (Pereda, 2018; Sverdlick, 2020), the most notable example comes from the so-called Social Impact Bonds (SIBs) implemented by the state of São Paulo, Brazil, to address the challenge of school dropout. As will be described, SIBs represent an innovation in terms of private sector accountability. In November 2017, the São Paulo Department of Education announced the introduction of SIBs as a pilot project, sponsored by the Inter-American Development Bank (IDB). This is a pioneering initiative that had the objective of increasing the pass rate and decreasing school dropout (SEE-S9, 2017, p. 1, cited in Cássio et al., 2018) through the hiring of external services, with the particularity that the hired organisation will only receive remuneration if it achieves the established impact goals (SEE-SP, 2017, cited in Cássio et al., 2018). Therefore, with payment being conditional on the fulfilment of the agreed goals, the contracted organisation undertakes the initial financial investment required to provide the service or intervention programme for which it is contracted. The pilot project started with 122 schools located in vulnerable areas of the Metropolitan Region of São Paulo, divided into 'treatment' and 'control' groups, in order to make it possible to carry out a quasi-experimental evaluation, the results of which were to allow determination as to whether the private providers had reached the agreed targets, according to the mechanism contemplated in the SIBs.

An additional feature of the SIBs is that they allow the main contracted provider to externally finance the capital necessary to implement the interventions. This means that the supplier can in turn subcontract a group of service providers to implement the interventions. Consequently, Cássio et al. (2018) warn that the SIB model leads to the development of a social financial ecosystem that encourages investors, think tanks and private companies —edu-businesses — to invest in a new market opportunity in education. The possibility of capitalising on social impact interventions distinguishes the SIB model from traditional philanthropy, in which the absence of profit-making is central to its legitimisation.

SIB design emphasises their adherence to rigorous standards of evidence production, their financial viability, their scalability and the replicability of their experimental implementation in various contexts. However, ethical considerations are neglected, particularly with regard to the use of control groups in social experiments. The question is: why should some students be excluded from an intervention that has been designed to benefit them? In other words, SIBs introduce new dilemmas that involve ethical, legal and ped-

agogical issues associated with the manipulation of vulnerable students, who become 'school guinea pigs'. In line with these ethical concerns, Cássio et al. (2018) argue that:

> The ethical problem of offering differentiated services to equally vulnerable populations is aggravated by the fact that the state contracts [private actors to address] these differences, breaking with the universalist standard which establishes education as a social right in the Brazilian Constitution. (Cássio et al., 2018, p. 19, own translation)

Table 5. Summary of characteristics and findings for various types of public-private partnerships

PPP Category	Main features	Rationale	Results
*Vouchers**	The government provides funding to parents to send their children to private schools.	Promotion of competition between schools	» Mixed results in terms of student performance, despite the increase in resources provided to at-risk students. » Segregation of students by socioeconomic status.
Charter schools**	The state provides funding and school buildings to private entities that manage schools in underserved areas while monitoring student achievement.	Increasing responsibility for the results; offering students living in marginalised areas access to quality education; increasing the autonomy of schools to innovate.	» There is no greater impact on students' learning than that seen in public schools (once socioeconomic status is taken into account). » Few students catered to (4%). » Exploitation of teachers' work (temporary contracts, low salaries, extended hours). » High turnover of teachers. » Lack of pedagogical innovation; teaching focused on testing.

PPP Category	Main features	Rationale	Results
Supply-side subsidies***	Supply-side subsidies Private suppliers receive direct or indirect funding.	Creation of financial incentives for private investment and participation in education.	» Private school subsidies attract a new population of low-income families towards the private sector, especially in urban areas. Reduction of overcrowding in public schools.
Tax exemptions	Reducing the tax burden for families who pay private school tuition; or granting tax exemptions to companies investing in education.	Reduction of families' financial barrier to choosing private education; encouraging corporations to invest in the education sector.	» Increased segregation of students, students, as low-income families cannot afford private school tuition. » Private foundations play a more important role in the provision of education, in the development of social programmes and in assisting students from vulnerable backgrounds through programmes against school dropout and promoting digital equity.****
Deregula-tion	Removal of legal and administrative barriers to the creation and operation of private schools.	Encouraging the expansion of the private school sector.	» Segregation between families from different socioeconomic levels. » Private schools tend to be located in high-income urban areas

PPP Category	Main features	Rationale	Results
Outsourcing	Hiring private providers to meet the demand for education.	Faster, cheaper, more efficient, and more effective than direct public provision or the construction of new public schools.	» A drastic increase in low-quality schools contracted by the government to serve low-income students for whom there is not enough space in public schools. » Lower student performance in contracted schools. » Lack of government capacity to monitor schools and hold these accountable.
Social Impact Bondsl	Offering services through private suppliers, while only paying remuneration when the specified goals are achieved.	Greater accountability capacity than public schools.	» Questionable ethical practices (for example, related to the exclusion of some students from programmes that might be beneficial to them in order to measure and compare effects on participating and non-participating students). » Questions as to replicability in different contexts.

*Note: *The findings refer to Chile's Preferential School Subsidy. **The information refers to the CEC Concession Schools Programme in Colombia. ***The findings refer to subsidised private schools in Argentina. ****These findings refer to examples from Uruguay. ***** The findings here are related to Colombia's programme to subcontract private schools. SES = socioeconomic status. The findings summarised here are derived from the literature reviewed for this study. Other studies may reveal additional or different results*

Low-Fee Private Schools (LFPS)

Low-fee private schools (LFPS) represent a relatively frequent privatising phenomenon in low-income countries. As the name suggests, LFPSs are private institutions that charge low tuition fees and cater mostly to socioeconomically disadvantaged populations. The available research suggests that the LFPS sector has undergone significant development in countries such as Peru, the Dominican Republic and Honduras since the 1990s (Verger et al., 2017; Edwards et al., 2021; Edwards et al., 2023b/c). This section, however, focuses on recent research on the emergence of a 'corporate' type of LFPS in Brazil that is new to the region, backed by direct and indirect public funding.

The Nature and Main Characteristics of Corporate LFPS

In addition to the traditional small LFPSs, these schools in Brazil increasingly follow a model based on management and financing by large corporations and international companies. Compared to the traditional LFPS sector, the main characteristics of which include its independent nature and its bottom-up dynamics, this new type of LFPS arises from a corporate business model and manifests itself in the creation of for-profit LFPS chains catering to low- and middle-income families. This is the case of the Luminova schools in São Paulo, whose funding comes mostly from large corporations seeking to increase the educational quality and student performance (Siqueira, 2017). An example of these corporations is Grupo Sistema Educativo Brasileño (Brazilian Education System Group, GSEB), a financial and investment entity owning private schools that has operated in São Paulo for more than 50 years (Montes, 2020). According to BayBrazil (2017), this corporation achieved expansion in the education market through different financial sources such as the acquisition of 95% of the Maple Bear Global Schools chain in Brazil and a 50% stake in the US Digital Media Academy. One of the main objectives of this corporation is to provide quality low-cost education to middle-class citizens, increasing access to the educational market. In this sense, GSEB represents a new phenomenon in Brazil, in which large educational corporations seek to expand their business activities to a segment of the population that has not yet been reached by the private sector. This expansion takes place through the expansion of LFPS chains such as Luminova, aimed at low-income families who aspire to access private education that claims to be innovative and of high quality (Montes, 2020).

With regard to their pedagogical approach, these schools exhibit particular characteristics: it has been described as inspired by the philanthropic neoliberal ideology favouring results-oriented education focused on training for the labour market. These practices are combined with discourse promoting competition between private and public schools. This

discourse proposes that private education is affordable and of high quality, while public education is free and of low quality. Despite the good condition of its infrastructure, the literature shows that Luminova schools have not escaped criticism: they have been denounced as a commercialised model selling an illusion to low-income families and for segregating students by their socioeconomic status (Montes, 2020).

Factors Explaining "the Corporate Turn"

There are at least three factors that have made the education sector increasingly attractive to the private sector in the region, especially when it comes to the lower-income sectors known as 'the base of the pyramid'. Firstly, economic growth and increase in the size of the working classes have made private schools more accessible. In fact, the beginning of the twenty-first century was marked by an increase in enrolment of students from low-income families in private schools, especially LFPSs, with the aspiration of accessing higher quality education at affordable prices. Between 2000 and 2015, private enrolment in education in Brazil increased from 13.97% to 21.10% (Adrião, 2015).

The expansion of the private sector was also driven by a process of deregulation which facilitated the activities of private institutions. This explains the active participation of companies and corporations in education, such as the Luminova school project designed by GSEB. In Brazil, laws contributing to this deregulation include the 1996 law on guidelines and bases of Brazilian education (LBD) and the Federal Constitution (1988). According to Montes (2020), these laws contributed to the growth of the public-private education network by promoting the right to choose.

The expansion of an increasingly individualistic meritocratic perspective in Brazil also boosted private school enrolment by virtue of the belief that change can happen through individual effort, as opposed to the collective idea of a common educational experience guaranteed by the state and public schools. This is gradually leading families to drop out of public schools and to sacrifice a large part of their income to pay for private education (Siquiera, 2015). In this sense, the perception of the lower educational quality of public education has been a determining factor in low-income families' decisions to access private schools in recent decades.

Table 6. Summary of characteristics and findings with regards to corporate low-fee private schools

Main Features	Low-Fee Private Schools
Rationale	Easy access to private education for low-income families.
Result	Expansion of the private sector towards previously unreached populations. Segregation by socioeconomic status. Lack of studies on the academic performance of students in low-cost private schools. Increase in corporate participation and investment in the low-cost private school sector.

Note: The findings summarised here are derived from the literature reviewed for this study. Other studies may reveal additional or different results.

The Transformation of PPPs through New Forms of Regulation

As has been seen in this section, the expansion of PPPs in the provision of education in the region in recent decades has generated increasing concerns about its possible negative impact on equity. While PPPs may have expanded access to education in certain countries, evidence suggests that they have often done so at the expense of an increase in school segregation and educational inequalities (OECD, 2012; Zancajo et al., 2021). In response to these concerns, states have turned to an approach focused on regulations as fundamental mechanisms to balance the supposed positive effects of PPPs —such as diversification, accountability and innovation — with the imperative of achieving better results in terms of equity (Zancajo et al., 2021). This approach, which is currently evolving, reflects the recognition that the expansion of PPPs, the provision of subsidies to private schools, the outsourcing of services and implementing competitive financing formulas have all proved to be insufficient to addressing the multifaceted challenges related to equity and educational quality in Latin America.

Regulatory measures have manifested themselves in various forms, including the use of SIBs (Social Impact Bonds) in Brazil to improve the accountability of private providers, the

implementation of centralised school admission systems in Chile with the aim of reducing segregation, and audit processes for contracted schools in Colombia. Nonetheless, in the vast majority of cases, these regulatory strategies have been insufficient, mainly due to a deficit in terms of those technical and administrative capacities required to execute sophisticated accountability frameworks. The intrinsic profit-maximising logic of the private sector clearly seems to overwhelm the limited regulatory capacity of the state. State regulations and research based on these therefore represent areas for future action and research. The following section analyses a trend that could be considered a step in this direction.

School Autonomy, External Evaluation and Accountability

Policies of school autonomy, external evaluation and accountability in the school environment are inserted into a global process of the transformation of governance models in educational systems, whose presence in Latin America became more significant since the 1990s (Anderson & López, 2017). Inspired by the New Public Management paradigm, these policies seek to introduce a series of novel regulatory instruments to the public sector with the aim of overcoming the limitations inherent to the bureaucratic governance models that have historically characterised the functioning of education systems (Rivas & Sánchez, 2020).

In the widely disseminated characterisation of educational privatisation types developed by Ball and Youdell (2008), autonomy, evaluation and accountability policies can be understood as forms of 'endogenous' privatisation, in the sense that they postulate "the importing of ideas, techniques and practices from the private sector" (p. 8) as a way to improve the public sector. The post-bureaucratic rationale that supports this model assumes that the granting of greater autonomy to educational institutions in terms of organisation, budget and a curriculum, which is then subject to external supervision focused on results, will result in improvements in teaching performance and learning (Verger et al., 2019). This is what Rivas and Sanchez call "regulated autonomy" (2020, p. 14), which in turn reflects what the sociology of professions has termed "new professionalism" (Evetts, 2009), a new form of increasingly external regulation of professional work. In this case, greater autonomy is granted to teaching professionals while also introducing greater performance pressure on their results — measured through standardised assessments — for which they are held accountable.

The boom experienced in Latin America of policies favouring school autonomy, external evaluation and accountability is verified by the fact that these constitute the most documented trends in the region in the period analysed, with 31 academic articles

published on these between 2015 and 2023. However, in this corpus of 31 pieces, more than 50% correspond to the case of Chile (n=17), followed by Brazil (n=8), Mexico (n=3), Colombia and Argentina (n=2), with two further studies providing a regional (although not exhaustive) perspective. The territorial distribution of the works identified may show, on the one hand, that the penetration of these policies has not yet become uniform nor widespread in the region. On the other hand, this disparity may also be indicative of the persistent intraregional inequalities in knowledge production. Nonetheless, the uneven adoption of these policies in Latin America compared to the regions in the Global North does not mean that these will not impose themselves on a regional scale in the coming decade. The few but necessary studies made providing a regional perspective seem to point in that direction.

Based on systematisation and analysis of the 31 identified articles, a synthesis is made of the elements characterising the incorporation of policies of autonomy, external evaluation and accountability in the region. The discussion is structured in three sections. The first focuses on the formulation processes of these policies. In line with that presented in the section on educational privatisation through policy-making, the literature analysed highlights the intervention of multiple actors operating at multiple scales in the policy-making stage. The second section provides a discussion, with examples of the crucial role that preexisting institutional arrangements appear to play with regards to the dynamics and effects that these policies produce in practice. Finally, the third section distinguishes a line of research that mainly focuses on understanding the effects of these policies on the professional identities of teachers. The discussion thus follows a basic scheme that approximates distinction between the stages of the formulation, adoption and implementation of public policies, while recognising the unclear borders and interdependencies that exist between these stages.

Origins, Legitimation and Formulation of School Autonomy, External Evaluation and Accountability Policies in Latin America

As has been documented in the case of reforms and privatisation processes for educational provision (Verger et al., 2017), reforms derived from the New Public Management paradigm aimed at promoting new work regulations in educational institutions have been strongly backed by diverse international organisations such as the World Bank and the Organisation for Economic Cooperation and Development (OECD). Starting in the 1990s, these entities gradually began to move away from an agenda that had been excessively centred on promoting the privatisation of education — that is, exogenous privatisation — which had been a prominent feature of their discourse

during the 1980s. Instead, they gradually began to advocate in favour of policies based on the premise that school autonomy, external evaluation and accountability are fundamental to improving the quality of education and the responsiveness of educational systems to current challenges.

At the same time, as has been seen in the section on the trend towards privatisation through policy-making, this paradigm shift has been increasingly supported by local actors and transnational networks producing educational policy, as well as by a wide range of private national and transnational philanthropic and consulting organisations (Anderson & López, 2017). The proliferation of these policies responds to a process of convergence that is at once regional and global, in which there has been a proliferation of mechanisms of external legitimation and emulation promoted by local political actors located along the ideological spectrum.

The literature reviewed for this report provides some examples illustrating this phenomenon in relation to policies focusing on evaluation and accountability. Most of these examples come from Brazil, where there has been intense activity on behalf of the private sector to influence educational policy and systems of evaluation of learning outcomes, which are used in numerous states and municipalities both to reward and sanction teaching work. Along these lines, Straubhaar (2017) states that when policy on teacher evaluation based on value-added measures was implemented in Rio de Janeiro, the Municipal Education Secretariat was mainly led by people with business and international organisation backgrounds, which strongly determined their assumptions and ideas on how to improve educational quality. Similarly, the author highlights links between Secretariat functionaries and representatives of local private networks and international organisations that have actively promoted the implementation of accountability systems. In particular, support for a value-added teacher assessment model, carried out by means on standardised learning tests, was based not so much on evidence as on a lapidary diagnosis of the educational system and, as confirmed by Straubhaar's ethnographic work (2017), on an ideological commitment to the virtues of the way the private sector operates. The way in which these educational policy-making networks operate is demonstrated, for example, in the fact that Todos Pela Educação was highly supportive of Claudia Costin's appointment to Municipal Secretary of Education, with Costin being a technocrat with a background in public administration and economics who has held positions in the World Bank, in several prominent private foundations, and in Brazilian state and federal governments (Straubhaar, 2017, p. 3).

The literature also highlights that a significant change has been observed over the last decade, in contrast to the period 1980–2000, when the World Bank exerted a predominant

influence on education in the region through the imposition of conditions. In this more recent period, the OECD has emerged as the main actor, exerting its influence more indirectly (via soft power) through the elaboration of technical reports and recommendations (Villani & Oliveira, 2018; Moschetti et al., 2020). In this context, dissemination of the results and recommendations of the PISA programme, along with the PISA for Development project, have helped to consolidate its dominant role. Research on Mexico and Brazil illustrates this phenomenon. In the case of Brazil, Villani and Oliveira (2018) demonstrate how the main indicator of educational performance, the Basic Education Development Index (IDEB for the initials in Spanish) was modelled following the example of PISA, with this latter programme contributing to its legitimisation.

In the case of Mexico, the adoption of a teacher evaluation policy was based on a report of recommendations made by the OECD. This report was used both as a source of external legitimation as well as a model for educational reform (Cuevas & Moreno, 2016). In the model obtained, teachers' performance evaluations determine whether they continue to hold their positions. These evaluations are not directly related to the results of standardised student evaluations, but instead are derived from direct evaluation of teaching work, for which teaching staff must submit a portfolio of documents and undergo an examination every four years.

Effects on Pedagogical and Organisational Practices

School autonomy, external evaluation and accountability usually are considered to be interconnected, mutually necessary policies. Therefore, their implementation usually takes place simultaneously. However, far from constituting a single uniform model, these policies are combined and manifested in very different ways (Verger et al., 2019; Rivas & Sánchez, 2020). The different cases identified in the region show that, on the one hand, school autonomy may be limited to pedagogical aspects, or may include management capacities, such as the hiring of teaching staff and administration of the school budget. In turn, external evaluations may vary in their typology, with those based on standardised tests being the most common in the region. On the other hand, accountability can result in different types of consequences for teachers, from constituting a diagnostic instrument for the elaboration of improvement plans (for example, in Argentina and Colombia), up to enforcing individual responsibility on teaching staff for the results of their students, along with the application of incentives and sanctions that have an impact on remuneration (seen in Chile and Brazil).

In terms of research on the effects and dynamics promoted by the different variants of these policies, most of the literature reviewed focuses on understanding their impact on pedagogical and organisational practices within schools. The most relevant broad conclusion that can be drawn from these studies is that the impact of these policies is highly dependent on the institutional context in which they are implemented. In general, adoption of these policies in countries with administrative traditions and educational governance systems as different as those found in Latin America has resulted in hybrid and sometimes contradictory forms of regulation (Anderson & López, 2017; Bellei & Muñoz, 2023; Rivas & Sánchez, 2020).

Thus, in systems structured as quasi-markets, as in the case of Chile, performance pressure can increase the competitive dynamics between educational institutions and result in an accentuation of practices such selection of students and teaching being strongly limited to the content assessed in standardised tests (Falabella, 2020). Several works demonstrate how accountability based on standardised tests generates changes in pedagogical practices with the objective of improving student outcomes. However, in the context of these systems, such improvements do not seem to generate positive effects in the long term, largely because the interventions that are usually deployed are of a one-off nature and are limited to low-performing students, as well as being oriented towards a curriculum restricted to preparation for standardised tests (Elacqua et al., 2016). In the same sense, Falabella (2016) describes how quality assurance policies (that is, evaluation and accountability policies) in Chile do not seem to contribute to the development of teaching capacities in the long term. Simultaneously, harmful effects are observed in educational institutions serving the most vulnerable population, as well as those pursuing non-traditional educational projects. The trend towards standardisation that has been produced by the introduction of external evaluation and accountability systems contravenes two of the fundamental policy objectives of school autonomy, especially of quasi-market systems, with these being horizontal diversification and increasing the responsiveness of educational institutions. As summarised by Falabella (2016), such contradictions and effects that are evident in practice instigate thought about more differentiated and flexible policies, formulated according to local needs and characteristics (p. 125).

On the other hand, in systems that combine this approach with more traditional mechanisms of centralised bureaucratic control, the multiplication of control procedures can lead to an overload of administrative work by management personnel, as reflected in the study based in Argentina by Bocchio and Grinberg (2019). The combination of moderate forms of school autonomy with directrices for project management, the development of improvement plans, and the regular conduct of external evaluations

has generated a technical administrative workload that educational institutions cannot assume (Bocchio & Ginberg, 2019). In Mexico, an increase in the bureaucratic workload associated with accountability policies has also occurred. According to Anzures (2020), this results in teachers neglecting essential aspects of their work relevant to students' learning. In these cases, contradiction arises from the historical context of regulatory regimes in which results-based accountability coexists uncomfortably with control systems focused on administrative-legal procedures.

Finally, a body of research limited to the case of Chile has begun to explore beyond the effects that these policies produce at a micro scale, to observe their more structural impact. This is the focus of the works of Bellei and Muñoz (2021) and Baleriola et al. (2021), which warn about the apparent irreversibility of such reforms directed at accountability. These reforms seem to have established a new, eminently evaluative and sanctioning function for the state that has proven extremely resistant to the changes that Act 21040 of 2017, passed to 'dismantle the educational market', was supposed to have affected. Closely related to this, other works describe the existence of a local consulting industry with educational institutions as its clients that is expanding in the shadow of the evaluation and accountability system operating in Chile (Garay & Sánchez-Moreno, 2017; Parcerisa et al., 2020). These works may shed light on phenomena whose expansion on a regional scale should be monitored.

Effects on Teachers' Professional Identities

The way in which school actors interpret and make sense of autonomy, external evaluation and accountability policies strongly determines how these are translated into practice. This close link has been explored in several works focused on understanding the transformations that these policies have affected on teachers' professional identities. To this end, these eminently qualitative studies have mostly resorted to concepts of *enactment* and *sense-making* to expand the excessively linear conception involved in policy implementation, thus exploring the representations that the actors have of these policies, as well as seeking to identify how these enter into dialogue with often very deeply established professional identities.

All the studies share the appraisal that external evaluation and accountability policies have had significant impacts on the field of educational, albeit in ways and directions that cast in doubt their supposed benefits. In this regard, Falabella (2019) suggests that these policies are not limited to encouraging test preparation practices nor restricting teaching to the contents of standardised tests, but that they also

have the power to profoundly transform school life and the teaching profession as a whole. Thus, beyond the effects that they may have on the pedagogical and organisational practices of educational institutions, these policies also affect fundamental aspects such as the personal prestige, status and self-esteem of the teaching staff, all of which ultimately have an impact on the dedication and confidence with which these approach their work. According to the researcher, accountability policies generate an ethic of comparison and competition in the educational environment, in which teachers are pressured to stand out in external evaluations in order to maintain their professional recognition. At the same time, the effects of these policies exceed those generated by the quasi-market system found in Chile. In particular, the author emphasises that:

> **The state deploys discourses and creates symbolic capitals (e.g. test scores, labels, league table positioning, awards) that are understood to convey the true meaning and worth of schools, professionals and community members in general. In fact, across the case studies, even though headteachers are concerned about school enrolment, and in some cases this concern is highly stressful; being accountable to the state and performing well on national tests appears to be much more energy consuming and emotionally demanding (Falabella, 2020, p. 17)**

Inostroza and Falabella (2021) further explore this issue, highlighting how these policies have a particular impact on special education teachers. They assert that these policies create a stressed teaching subjectivity (p. 137), which is in conflict between the need to comply with standardised evaluation standards and the roles, ethos and functions historically performed by these professionals within the framework of an inclusive educational paradigm.

In systems in which accountability policies are linked to salary incentives, transformations to the identity of teachers seem to be similarly accentuated. Along similar lines, Andrade (2021) examines how these policies have contributed to the fragmentation of the teaching profession in Brazil, where numerous states and municipalities have introduced salary incentive systems linked to the results of standardised assessments. This research highlights a trend towards the individualisation of teaching responsibilities, which poses significant setbacks to collaboration and teamwork in schools. The results of Montecinos et al. (2023), however, partially contradict this affirmation in highlighting the fact that in Chile, when external evaluations yield positive results, these seem to contribute to the creation of trust between the different school actors. The study does not, however, investigate the effects of an alternative scenario.

In any case, there seems to be a series of mediating elements to the way in which teachers interpret and give meaning to policies of autonomy, external evaluation and accountability. Based on a very interesting study developed in Belo Horizonte (Brazil), Mentini (2023) observes the importance of school principals as key actors in the reception and implementation of policies of accountability. Her analysis emphasises three factors that play a crucial role in this process. Firstly, the positional power and gender of those who make up the management team influence how these policies are received and implemented. Secondly, the socioeconomic composition of the educational institutions also plays an important role, as schools with more diverse student populations may face additional challenges in implementing accountability policies. Finally, school administration authorities — whether at the municipal or state level — can significantly influence how these policies are translated into practice. Along these lines, it was found that the proximity of the authorities when offering monitoring and support for decision-making is improved in the case of municipal schools.

Conclusions

Policies of school autonomy, external evaluation and accountability represent a significant trend in the recent transformation of educational systems in Latin America. Over the past few decades, these policies have gained relevance, spreading throughout the region, albeit unevenly. Operating in this process are the mechanisms of external legitimation and influence exerted by multiple actors, in a way that is typical of the expansion of the so-called global educational policies.

The implementation of these policies has resulted in a diverse combination of regulatory elements. As has been seen, their impact on the pedagogical and organisational practices of schools is highly dependent on the institutional context in which they are implemented. In quasi-market systems, as in the case of Chile, there has been an increase in competition among educational institutions and a greater pressure towards practices such as the selection of students and teaching being focused on the contents evaluated in standardised tests. In systems that combine accountability approaches with more or less centralised bureaucratic controls, administrative overload for schools can be a problem, with negative effects on teaching. In the structural field, those systems that relegate to the state the function of monitoring and sanctioning may, on the one hand, be laying the foundations of an irreversible trend. On the other hand, the pressure on schools seems to be fuelling the creation of an industry for consulting service providers — at least partially financed with public funds — to which the management teams of educational institutions turn in search of solutions.

Finally, the implementation of policies of autonomy, external evaluation and accountability also has a significant impact on the professional identities of teachers, an aspect that is being increasingly examined and documented by numerous studies undertaken in the region. In systems where accountability policies are linked to salary incentives, there has been a tendency towards the individualisation of teaching responsibilities, to the detriment of collaboration and teamwork. On the other hand, the impact of such policies on 'low consequence' systems, although poorly documented, could constitute a promising line of inquiry.

Table 7. Summary of the characteristics and findings with regards to policies of accountability and school autonomy.ç

Features	Findings
Key features	Schools have autonomy in the area of school governance (for example, in areas of budget, curriculum, etc.) at the same time that they are evaluated according to standardised indicators.
Rationale	Schools perform better when they are accountable for results.
Results	The effects of these policies are sensitive to school contexts. In quasi-market systems, these policies lead to student selection practices, focus on teaching for testing, competition between schools, and the emergence of uniform practices between schools (to maximise test scores, rather than using autonomy for other purposes). In systems of strong central control, these policies lead to heavy administrative overload (for example, related to the testing and monitoring of student performance, development of school improvement plans, projects for academic excellence, teacher evaluation, etc.). The attention of teachers is distracted from areas of professional responsibility not related to academic performance. Promotion of an ethic of comparison among teachers, the individualisation of responsibilities for student results, a loss of self-esteem and a general movement away from an ethic of care, cooperation and collaboration. Great difficulty is experienced in undoing accountability schemes once implemented.

Note: The findings summarised here are derived from the literature reviewed for this study. Other studies may reveal additional or different results.

Resistance Movements against Privatisation and Defenders of Public Education in Latin America

The trends towards the privatisation of education identified in this report have encountered multiple forms of resistance, ranging from direct action against certain privatisation policies and initiatives, to other more subtle forms of opposition, such as the creation of academic knowledge that demonstrates the negative consequences of such trends. These resistance movements have emerged among the sectors of society that are directly affected by educational privatisation, or that hold contradictory values (for example, in which education is seen as a public good that should not be subjected to private entities or companies) (Verger et al., 2017). During the decade 2013-2023, resistance to privatisation in Latin America and the Caribbean has been carried out through social movements, protests and other forms of collective action. The movements reviewed in this section represent different Latin American geographical areas, and are thus framed in specific social contexts. They differ from each other in terms of their objectives, rationale, political strategies to achieve influence, and their effects. Even so, all these movements share the same roots in that they are configured as reactions to the neoliberal logic that has accompanied certain educational reforms over the last forty years, not only in Latin America, but on a global scale. These movements are therefore characterised by their defending quality public education as a human right (Martínez et al., 2022).

Several studies have registered the emergence of collective resistance to the privatisation of education in Latin America. Specifically, this section is based on the review of ten academic articles documenting anti-privatisation and pro-public movements that have taken place in the region since 2013. In these articles, cases of resistance to educational privatisation have been documented in particular in Chile. To a lesser extent, academia has also documented experiences of resistance against the privatisation of education in Brazil and Mexico. Despite the differences that can be found due to the particularities of each context, these movements share certain elements, such as the type of actors involved, which includes university and secondary school students, teachers, families, educational leaders and various social organisations.

Below, exploration is made of differences and similarities that can be identified in the complex landscape of resistance movements against the privatisation of education in Latin America. Firstly, the main movements that have been identified

in the literature are presented. Similarly, review is made of the roles of actors who have put up resistance, along with the way these have established alliances to strengthen their collective efforts and expand their impact on education. Following this, the projects and ideologies that these movements have faced are dissected, with identification of the initiatives they question, and contrasting these with the ideals of quality equitable public education advocated for by these movements. Next, the wide range of strategies they have used to promote their cause is explored. Finally, the impacts and documented results of these resistance movements are presented, highlighting their transformative influence on educational policies and on broad socio-political discourse on public education within the region.

Movements against Privatisation in Latin American and the Caribbean *(what and where)*

Table 8. Resistance movements and the defence of the right to public education in Latin America (2013-2023).

Type of movement	Movement names	Repertoires of collective action	Main actors involved	Location and year
Anti-standardisation movements	Mexican teachers' movement or Mexican anti-standardisation movement	Protests Teacher Demonstrations: "The National Strike" Boycott of standardised tests	Coordinadora Nacional de Trabajadores de la Educación (National Coordinator of Education Workers) (CNTE)	México (2016)

Type of movement	Movement names	Repertoires of collective action	Main actors involved	Location and year
Anti-standardisation movements	Alto al SIMCE (Stop SIMCE) Campaign Movimiento de docentes disidentes (Dissident Teachers' movement)	Academic texts Social Media (Facebook and Twitter) Boycott of standardised tests	University and high school students Academics International organisations: CLADE, CLACSO, Chicago Teacher Union, Red SEPA, Trinacional por el Derecho a la Educación	Chile (2013 to present)
Movements against accountability schemes based on teacher performance	Campaña para una Nueva Carrera Docente (Campaign for a New Teaching Career)	Teacher demonstrations	Teachers Association	
Movements in favour of the public financing and administration of schools and universities	Student movement	Occupation of school campuses	University and high school students	
	Primavera secundarista	Occupation of school and university campuses: Escolas da Luta Mass demonstrations	University and high school students Family Commissions: Comitê de Mães e Pais em Luta	Brazil (2015-2016)

As shown in Table 8, the most prominent examples of resistance movements against the privatisation of education in Latin America include the Primavera secundarista movement in Brazil (Miller, 2023), the *Alto al SIMCE* campaign in Chile (Yancovic et al., 2016; Parcerisa & Villalobos, 2020; Parcerisa et al., 2022), and the teachers' strikes against the Professional Teaching Career Project, also in Chile (Arriagada & Díaz, 2018; Estay, 2022). The mass strikes held by the CNTE in Mexico, better known as the Mexican Teachers' Movement, is another notable example of the anti-privatisation movement in Latin America (Parcerisa et al., 2022).

Particularly notable among those identifying themselves as opposed to standardised tests in Latin America between 2013 and 2023 were the aforementioned Mexican Teachers' Movement of 2016 and the *Alto al SIMCE* campaign in Chile, which began in 2013 (Martínez et al., 2022). Firstly, the Mexican teachers' movement and the *Alto al SIMCE* campaign represent important examples of resistance against standardised education policies, highlighting the struggle for more equitable quality education. Several academics have documented that in the case of Chile, the trigger that started the denunciation campaign occurred in 2013 when the Chilean government announced that it would implement a ranking of schools based on 73% of the SIMCE exam scores (Yancovic et al., 2016). This ranking carried penalties for persistently low-performing schools, including the threat of closure. This generated concern in terms of social inequalities since a correlation was identified between SIMCE scores and the income level of students' families, thus implying that schools with the most disadvantaged students were in danger of closing. In response to this threat, the *Alto al SIMCE* Campaign was launched in August 2013, promoted by teachers, researchers and academics critical of the SIMCE. The main purpose of the campaign was to make society aware of the negative consequences of SIMCE testing on Chilean education, as well as highlighting the political approach from which it had emerged. These consequences, which included impacts on the emotional health of teachers and students, as well as on pedagogy and the curriculum, were communicated through the preparation of manifestos, open letters and boycott actions against the test.

Secondly, the Primavera Secundarista movement, which took place in Brazil between 2015 and 2016, together with the Chilean student movement, represent the movements in Latin America in favour of public education. The Primavera Secundarista movement gained national prominence with more than 1000 high schools and 200 universities being occupied by high school students throughout the country, representing a significant resistance effort "to keep public schools open, funded, and functional, against outsourcing and privatisation" (Miller, 2023, p. 1). The Primavera Secundarista

movement in Brazil was inspired by several historical struggles and movements such as the massive student movements in Chile in the 2000s, the anarchist-influenced protests of 2013, teacher unions, and previous resistance to the Brazilian dictatorship (Choudry & Vally, 2018). In Chile, from 2013 various student movement spokespeople entered the political arena, acquiring growing presence in the representative system.

Finally, the biggest movement against accountability schemes based on teaching performance took place in Chile, where teachers have been actively engaged in resistance against these initiatives, particularly through opposition to the Carrera Profesional Docente project (Professional Teaching Career Project). The resistance movement raises significant concerns about the construction of this standards-based measurement project, which directly affects teachers' careers in terms of ranking, salaries and opportunities for professional development. As Martinez et al. indicate (2022): "In Chile, together with a massive students' movement protesting against an extended marketised model of education, academics, teachers, and students organised a campaign demanding the end of high-stakes testing policies" (p. 9).

Actors and Alliances Involved (who)

The resistance to privatisation in Latin America involves a diversity of actors and alliances that have emerged in defence of equitable public education in the region. As Parcerisa and Villalobos (2020, p. 2441) point out, "to maximize their power, social movements often resort to creating alliances with other civil society groups and/or organisations" (own translation). Over the years, these actors have come together in a common struggle, each contributing their unique strengths. Below, we examine the main actors and alliances that have played crucial roles in this resistance, using academic references to support each point.

On the one hand, the *Alto al SIMCE* movement (Parcerisa & Villalobos, 2020) was led by young social science researchers associated with the Catholic University of Valparaíso and the University of Chile. Initially, they sought alliances with international and local organisations, including the Campaña Latinoamericana por el Derecho a la Educación (Latin American Campaign for the Right to Education, CLADE), the Red SEPA (Idea Network), Save our Schools, the Chicago Teachers Union, among others, as well as academics, public figures and parliamentarians (Parcerisa & Villalobos, 2020). Later, they turned to alliances with teachers and secondary and university students in order to incorporate an anti-elitist struggle and coordinate certain actions, such as the 2015 boycott of the SIMCE tests. Even so, it was not possible to establish a sufficiently strong coalition between all actors

to end SIMCE (Parcerisa & Villalobos, 2022). Nonetheless, the movement of Chilean teachers who advocated for a new professional teaching project (Arriagada & Díaz, 2018; Donoso-Díaz 2020; Estay, 2022) was mainly composed of a sector of Chilean teachers from the Teachers Association who were looking to undertake a significant role in shaping the Professional Teaching Career Project, challenging the traditional top-down approach to educational policy making.

As for the Primavera Secundarista movement in Brazil, the key actors in this movement were high school students representing student sectors who would suffer most from attacks to public education. There was representation from an intersection of multiple areas, including black, women and LGBTQIA+ student groups. Furthermore, this movement was characterised by the formation of strong alliances with teachers, education workers, parents and community members, which deepened the impact of student mobilisations (Miller, 2023). Extensive solidarity networks were forged with various community actors, including teachers, education workers, parents and community members. Events were held in collaboration with groups such as the Cooperifa, the Café Filosófico da Periferia, and popular educator networks, among others. This collaboration strengthened student mobilisations and promoted intergenerational knowledge transfer (Miller, 2023).

The National Coordinator of Education Workers (CNTE) has been the main actor in the resistance to the Educational Reform of 2013 in Mexico. It has allied with a variety of actors, including student movements, the movement for the safe return of the 43 Ayotzinapa students, and the Popular Assembly of the Peoples of Oaxaca (APPO). In addition, it has sought the support of national and international political figures and academics (Parcerisa et al., 2022).

As a common feature between the different movements, it is worth noting that academics have played an active role in supporting all movements, in collaboration with teacher movements, students, parents, education workers and other key players. This collaboration has helped to generate solid political and technical discourse against privatisation and standardisation policies (Martínez et al., 2022). Especially in the case of *Alto al SIMCE*, collaboration with academics has legitimised the demands of the movement, supporting these with technical measures backed by empirical studies. This has counteracted some of the premises that are promoted with regards to standardised tests. Even so, the lack of cohesion between different actors within movements seems to be a key factor impeding greater impact of resistance actions against privatisation.

Counter-Hegemonic Narratives and Challenged Projects *(why)*

In the context of resistance movements against the privatisation of education in Chile, Mexico and Brazil, the central focus has revolved around challenging specific neoliberal and pro-privatisation education projects and policies. These initiatives include increasing tuition fees at public universities, establishing for-profit educational institutions, the implementation of austerity measures leading to budget cuts for education and public funding, as well as the use of standardised tests as a supposed objective measurement of educational quality.

The student movements in Chile, as observed by Inzunza et al. (2019), challenged the implementation of neoliberal policies in education, especially those that encouraged privatisation through external intervention, standardisation, testing and accountability measures. Their resistance questioned the excessive importance attributed to high-stakes standardised tests, instead advocating for a more equitable, quality-oriented education system. The movement's objective was to promote the principles of free, supportive, egalitarian, critical and transformative education, while opposing the commercialisation of publicly funded education. It should be noted that, in the context of the 2013 Chilean presidential election, education emerged as a central issue, with the centre-left coalition using student struggles to mobilise youth and progressive voters, which eventually led to significant legislative changes in line with student demands. For K-12 education, private schools in Chile that received public funding had to eliminate co-payments, cease student selection and declare themselves non-profit institutions (School Inclusion Law, 2015). Such schools would then receive additional state subsidies to compensate for the lack of charging fees to families with the aim of preventing socioeconomic discrimination. These legislative changes also marked the end of the participation of municipalities in the administration of education. The teaching profession in Chile also underwent significant transformations, including higher standards for teacher training institutions, the introduction of an induction system for new teachers, an increase in non-teaching hours in schools, and the establishment of an evaluation and categorisation system for teachers with direct implications on salaries.

Nonetheless, despite these legislative efforts, the underlying logistics of the neoliberal framework persist. The voucher system is still in place, while the principle of equity for public and private institutions means that a significant portion of new educational funds flowed to the private sector, with totally private schools still having the ability to select students based on historical performance in standardised tests, although with some exceptions. The Unión de Profesores de Chile (Teacher's Union of Chile, UPCh) and oth-

er educational groups criticised these policies, arguing that they promote a model of accountability in schools, shift the role of principals from being pedagogical leaders to administrators, and emphasise standardised test scores (Arriagada & Díaz, 2018).

Along these lines, it should be noted that the Chilean movement, through the *Alto al SIMCE* campaign, singled out SIMCE standardised tests as its main criticism (Parcerisa et al., 2022). They considered the SIMCE not only to be a tool to measure student learning, but also to be a crucial instrument enabling school selection, thus promoting competition within the school system in Chile. The SIMCE was therefore seen not simply as a tool to measure student learning, but as a crucial instrument to enable school selection, thus promoting competition within the school system in Chile. This perspective led *Alto al SIMCE* to strategically challenge standardised testing, in particular questioning its supposedly neutral technical nature.

Furthermore, *Alto al SIMCE* was characterised by the participation of activists with academic training, which influenced the movement's discourse. Unlike other movements against standardisation, *Alto al SIMCE* questioned the very nature of the instrument and its underlying objectives, arguing that the SIMCE was not designed to support educational institutions, but rather to classify, reward and penalise schools and teachers. The movement further emphasised the technical limitations of the instrument, questioning its validity and expressing concern as to the negative pedagogical effects associated with such tests (Parcerisa & Villalobos, 2020). They also identified standardised tests as contributing to school segregation and the emergence of distress in both teachers (suffering effects such as anxiety and depression) and students (suffering from stress). As highlighted by Yancovic et al. (2016), the campaign argues that SIMCE has historically served the educational market in Chile, with significant implications for both teachers and students. To address these issues, the movement insisted on the need to rethink the fundamental purpose of educational assessments. The campaign is aligned with a broader social justice-oriented evaluation narrative, as discussed by authors such as Greene (2013) and House and Howe (1999). This perspective sees evaluations as inherently political, advocating in favour of their potential to propel social change with a specific focus on justice, democracy and equity. *Alto al SIMCE* plays a crucial role in denouncing the predominant role given standardisation, proposing instead alternative approaches that prioritise a more equitable and socially just educational system (Yancovic et al., 2016).

In Mexico, a similar movement against standardisation emerged among teachers. It also strongly criticised the standardised testing framework introduced in the 2013

education reform. The movement especially highlighted the lack of consideration for cultural diversity in the design of the standardised tests in question. According to Parcerisa et al. (2022), although standardised tests were intended to provide universal measurements, in practice they did not manage to sufficiently take into account the socioeconomic contexts of schools and students. This led to an 'unfair' evaluation framework that reinforced centralism and the imposition of a uniform culture. The National Coordinator of Education Workers (CNTE) argued that the reform sought to transform public schools into non-democratic corporate entities that produce passive citizen-consumers. As stated by Parcerisa et al. (2022), the CNTE connected standardised test-based accountability with the broader privatisation of the educational system, which had profound labour implications for teachers and educational organisations.

The student occupations in Brazil, as described by Miller (2023), were a response to the threat of school closures, outsourcing and the privatisation of public education. These protests were aimed at challenging privatisation and outsourcing, with the movement finding support through teacher unions and their strikes. The movement was characterised by its diverse leadership, with prominent roles played by students who were black, women and from the LGBTQIA+ community. This student mobilisation in Brazil was one of the most significant of its kind in the country since the era of struggles against the military dictatorship.

On being faced with the challenges of privatisation and standardisation, the defenders of public education taking part in these movements constructed counter-hegemonic narratives. These narratives not only rejected the privatisation of education, but also presented a compelling vision of the future of education. They embodied a collective call for publicly funded education systems that are committed to providing universal accessible, high-quality education, regardless of economic background. These movements emphasised the principles of equitable access to quality education, advocating in favour of inclusive and democratic decision-making processes in education policies. In the midst of these challenges, the resistance movements not only challenged the prevailing discourse, but also illuminated a path towards truly equitable, inclusive and just education. These movements exerted an unprecedented counterweight to the market education model and significantly impacted on educational debate. They transformed the political landscape and opened up new opportunities for structural reforms, representing a remarkable example of counter-hegemonic narratives in action (Rosenzvaig-Hernandez, 2022).

Repertoire of Collective Action Strategies *(how)*

Analysis of the repertoires of collective action in the contexts of Chile, Mexico and Brazil reveals a variety of approaches used by social movements. Parcerisa et al. (2022) describe these repertoires as "an amalgam of practices through which social movements construct collective identities and mobilise broader segments of the population to exert pressure on political adversaries in a delimited field" (p. 10, own translation). For example, the *Alto al SIMCE* Movement in Chile initially adopted a strategy focused on academic approaches oriented towards the general public. In contrast, the CNTE in Mexico relied on more traditional repertoires of action to put pressure on the government, such as strikes and blockades. Over time, both movements adapted their strategies by incorporating direct disruptive actions, such as boycotting standardised tests.

The use of social networks and digital platforms also played a fundamental role in communicating their messages and in mobilising anti-standardisation movements. *Alto al SIMCE* effectively leveraged platforms such as Facebook and Twitter to promote its campaigns and reach a wider audience. In Mexico, although the CNTE also used social networks, its impact was limited in comparison, possibly due to the more conventional nature of their protest actions (Parcerisa et al., 2022). In addition, Martinez et al. (2022) note the use of roundtables and forums as a key strategy employed by movements challenging standardisation in places around the world, such as Brazil, Catalonia and Chile. These initiatives seek to persuade and engage diverse audiences, incorporating social actors and evaluation experts to critically analyse the use of testing to promote improvements in teachers and schools. This collaborative approach emphasises the importance of inclusion and collective decision-making in shaping educational policies, while questioning the dominant paradigm of standardisation.

The articles reviewed revealed three typologies of repertoires of collective action, as identified by Parcerisa et al. (2022) in their comparative study on resistance in Chile, Mexico and Spain. Along these lines, this section reviews: i) repertoires of classical direct action; ii) repertoires of disruptive direct action; and, iii) cyber-action.

Repertoires of Classical Direct Action

In the Mexican context, highlight can be made of the National Strike, which went from May 2016 until the beginning of the school year in September of the same year. During this strike, actions such as the blocking of roads and railways, the occupation of companies, and mass mobilisations and marches were carried out throughout the country.

These events, according to research by Ameglio et al. (2018), included violent confrontations between protesters and police forces, with a total of 960 civil resistance actions recorded in the first three months of the National Strike (Parcerisa et al., 2022).

In the Chilean context, direct action such as strikes and demonstrations were used in the resistance against educational standardisation. However, these actions did not have the same impact nor did they provoke the violent responses observed in Mexico. The *Alto al SIMCE* movement in Chile initially opted for a more academic and public opinion-oriented strategy, prioritising the elaboration of proposals and dialogue. However, from 2015 the movement underwent a transformation towards a more activist orientation, seeking to align its proposals with the high school student protests. This transformation shows how action repertoires can be adapted as movements evolve and adjust to the specific circumstances of each context (Parcerisa et al., 2022).

Similarly, the Brazilian student movement in 2015-2016 carried out student occupations in response to educational concerns, especially due to the São Paulo state government's announcement of school closures. Students believed that this would affect the quality of public education and open the door to privatisation. Protests began with the participation of thousands of students, intensifying with the occupation of more than 200 schools in the state of São Paulo. This wave of occupations spread throughout Brazil in 2016, aimed at various problems in education, such as the precariousness of contracts for education workers, subcontracting and school infrastructure. Students established alliances with teachers and unions to demand better conditions and greater investment in education. Student occupations were also related to reforms in secondary education, austerity measures and conservative projects such as Escola Sem Partido, which led to internal debates in the student movement about its self-organisation, its relationship with existing institutions, and their reformist approach in the face of more radical options (Miller, 2023).

Repertoires of Disruptive Direct Action

Anti-standardisation movements have employed innovative forms of disruptive actions, with the main method being the boycott of standardised tests. Such boycotts, in practical terms, implied coordination between families, teachers and students, who refrained from attending schools or administering standardised tests as an act of rejection and direct resistance against standardised assessments.

In the case of Chile, the *Alto al SIMCE* movement also considered boycotting standardisation as a form of direct disruptive action, especially in 2015. However, educational

communities were divided between supporters and opponents of such boycotts. Unfortunately, the impact of this action in Chile did not have the scope achieved in other contexts, such as in Spain, where it remained a sporadic strategy used by the Marea Verde movement (Parcerisa et al., 2022). On the other hand, in Mexico, the resistance movement adopted programmed boycotts as an action against punitive measures within the educational reform that sought to de-professionalise teachers. Specifically, a group of masked activists made a strong statement in June 2015 on infiltrating the Secretariat of Public Education (SEP for the initials in Spanish) of the Chiapas federal government, where they burned the exams scheduled for state teachers that year (Parcerisa et al. 2022).

Brazilian students involved in the 2015-2016 movement took a slightly different approach. They tended towards autonomous self-organised strategies, favouring direct action instead of appealing to the authorities and rejecting the existing institutional structures. This approach, identified as autogestão (self-management) by Miller (2023), allowed students to challenge the functioning of current structures and question the notion of institutional democracy. Through autogestão, the students experienced *conscientização* (from Portuguese, consciousness), that is, a greater awareness of their rights, Brazil's political economy, and the insufficient investment in education that existed. Their ultimate goal was to form informed citizens with the capacity to critically analyse their country and the world (Miller, 2023). Students achieved collective agency and autonomy by practicing mutual aid and organising their daily life through *comissões* (commissions). This autogestão aimed at the collective ownership and operation of schools. The movement challenged the social divisions of work and traditional gender roles, emphasising collaboration and advocating for gender equality, both within the movement and in society at large. Inspired by Paulo Freire's critical pedagogy, the students transformed their learning experiences, moving from traditional instruction to dialogue-based learning. They encouraged interaction and equality among students and addressed diverse topics beyond the regular curriculum, fomenting a better understanding of their world, gender roles and practical life skills. These initiatives empowered students to become informed proactive citizens committed to change.

Cyber-Actions

Over the past decade, social movements around the world have harnessed the power of social media and online communication to amplify their protest actions. The different approaches and the influence of these cyber-actions vary according to each movement's context, identity and political opportunities.

In the case of Chile, *Alto al SIMCE* made extensive use of social networks, especially Facebook and Twitter, to spread its message and expand the reach of its cause. Faced with the geographical dispersion of its members, the movement recognised the need to establish a more organised presence in Chile, focusing on informational and awareness-raising activities. *Alto al SIMCE* effectively used hashtags such as #SIMCE and #altoalSIMCE to mobilise followers around its main message: the boycott of standardised tests. Through social networks, the movement launched campaigns, sharing critical videos such as El problema del SIMCE (The problem with SIMCE), also confronting the government and other political actors associated with private corporations and pro-market think tanks in education. Its online presence further contributed to *Alto al SIMCE*'s visibility. In addition to this online presence, the movement actively sought opportunities to share its message in various media platforms, becoming a frequent source of newspaper articles. It also used semiotic strategies, such as associating the main character from The Little Prince with their campaign, reinforcing the idea that "the essential is invisible to the SIMCE".

In Mexico, although social media platforms such as Facebook and Twitter were used, they did not have as great an impact as that seen in other contexts, especially as compared to Chile. The CNTE mainly used these platforms to announce the results of its demonstrations and to share information on events. The influence of these platforms remained relatively limited, largely due to CNTE's preference for more traditional organisational means. In addition, some online communication efforts were led by specialised organisations, such as the Social Communication Centre of Oaxaca's Sección XXII, which had a significant online presence with a substantial number of followers. As a result, social networks played a less prominent role in the Mexican movement, with more classical forms of mobilisation being preferred.

Similarly, the use of social networks for digital mobilisation made by the Brazilian Primavera Secundarista movement faced particular challenges. Although Brazilian students were engaged in autonomous, self-organised approaches, they did not have the same level of influence through social networks. The movement's ability to leverage digital platforms for its cause was more limited, as its advocacy faced strong opposition from well-funded conservative and pro-privatisation groups (Alves et al., 2021).

Impact and Results

Analysis of the impact and results of the various resistance movements against the privatisation of education reveals a multifaceted panorama with considerable effects. This section reviews the documented impacts on public policies, public opinion and the educational system that are presented in the articles reviewed.

First, these resistance efforts have led to discernible policy reforms, especially in countries such as Chile and Mexico. Prolonged protests and advocacy efforts have resulted in substantial changes to educational funding mechanisms and to the expansion of access to public education, in alignment with the central demands of resistance movements. According to Parcerisa et al. (2022), movements in Chile and Mexico made significant progress in their respective contexts. In Chile, *Alto al SIMCE* contributed to the questioning of the legitimacy of standardised testing, which led to a reduction in the frequency of these tests and the introduction of support procedures for schools. In Mexico, the CNTE played a fundamental role in the repeal of the 2013 education reforms and the amendment of constitutional articles related to education.

Additionally, these movements have been successful in raising awareness of the adverse consequences of the privatisation of education and the vital role played by public education. The movements' mobilisation and advocacy have effectively engaged a wider audience, fostering deeper understanding of the multi-faceted issues surrounding privatisation. Resistance movements have cultivated solidarity, forged networks and created alliances between various social and political groups. In uniting around the common goal of safeguarding public education, these coalitions have strengthened their collective influence, creating a potent force to counter pressures in favour of privatisation.

According to Miller (2023), student movements in Brazil not only impacted on society at large, but also contributed to education in their own right. The teachers themselves learned from students through these movements, through which they came to recognise the value of student activism, its ability to connect its struggles with the community and its creation of networks in cities and regions. These movements also provided students with platforms to engage with issues that were personally meaningful to them, so fostering critical thinking and a deeper understanding of their world. These educational contributions are often underestimated, given the common perception that students are focused solely on being rebellious.

Nonetheless, maintaining radical educational practices within schools became challenging after the occupations in Brazil. Most student activists graduated from or dropped out of school, so handing control back to the authorities and teachers. In addition, global educational norms and conservative influences represented obstacles to preserving these practices, especially in the face of social conservatism and the far-right administration of Jair Bolsonaro from 2019 to 2022. The Brazilian student movement therefore experienced a phase of decomposition influenced by several factors including government concessions, exhaustion and repression. However, post-occupation activism led many ex-student activists to redirect their efforts towards various causes and movements, so keeping alive the radical horizontal organisational orientation of the student movement (Miller, 2023).

In Chile, the *Alto al SIMCE* movement achieved a significant impact through questioning the legitimacy of standardised tests in education. The movement gained visibility in public opinion and the media, influencing academic circles and also contributing to the introduction of demands against standardisation in the agenda of the new centre-left government. In Mexico, the mobilisation of teachers led to the repeal of the Peña Nieto government's educational reform. Through five years of opposition, the movement managed to challenge the expansion of standardised tests and the responsibilisation of teachers for student results (Parcerisa et al., 2022).

Taking into account all the above, it must be recognised that although resistance efforts have contributed positively to the defence of universal public education, challenges remain. Despite the movements' successes in political reforms, privatisation efforts continue in many regions, posing ongoing threats to public education systems. Moreover, the results achieved by resistance movements are not always immediate or all-encompassing, with the struggle to protect public education remaining an ongoing effort. These limitations have their roots in the socio-political structure that emerged following authoritarian states, in which market reforms resulted in a deterioration of the quality of democracy (Weyland, 2004). Nonetheless, the tireless efforts of these movements underscore the ongoing commitment that exists to reshaping and protecting public education systems.

Conclusions

This study is essentially a mapping exercise. Set within the framework of the period 2013-2023, the purpose of this paper has been to identify and describe the trends towards and the consequences of educational privatisation in Latin America, as well as the efforts that have been made to resist and dispute these trends. As detailed, three privatisation trends have been identified related to PPPs, school autonomy and accountability, and privatisation through policy-making. Just as these trends manifest themselves in different ways, so do the various forms of resistance to privatisation. Rather than repeating the nuances that have been offered throughout this report, presentation will be made of intersecting comments that are derived from observing and synthesising the findings in each of the previous sections. The goal here is to gain perspective and to share a series of final reflections on the broader and joint implications of each of the trends outlined in this report. None of the three privatising trends discussed are strictly new. They have all been previously identified, and have evolved over decades. The contribution of this report is that it allows an appreciation of the way these trends complement and reinforce each other, and how they lead to results that are similar or related.

Indeed, the simultaneous advance of multiple forms of privatisation throughout the region should not surprise us. Although there are differences in terms of political context among countries, the widely held belief that state bureaucracies provide low-quality education creates a situation in which privatisation is perceived as a desirable alternative. The supposed low quality of public education also contributes to normalising the provision of public resources to private schools, even when studies show that private schools do not perform better. This is evident in the case of Chile, where the continuation of a voucher system has promoted the creation of more than 130 new private schools, at the same time that 420 public schools were closed between 2008 and 2013 (López & Moreno, 2016). Similarly, the charter school policy in Bogota, Colombia, has continued despite evidence that the differences in test scores between traditional public schools and charter schools disappear once socioeconomic characteristics are taken into account (Termes et al., 2017; Edwards & Hall, 2017; Edwards et al., 2020). In other words, it is not private schooling that determines better performance; rather, it is the relatively more privileged position of families who send their children to private schools and charter schools.

The previous paragraph suggests that public policy should focus on creating the equitable distribution of income among families, especially if a level playing field is of concern when children start attending school. Yet on many occasions, the opposite has been observed. For example, in Mexico and Uruguay, the government has granted tax exemptions for tuition payments to private schools. This strategy disproportionately benefits middle- and high-income families, since low-income families cannot afford private school tuition (Espíndola, 2016; Pereda, 2019). In Peru, deregulation of bureaucratic restrictions in private schools has caused a boom in this sector (Carrillo et al., 2021). In each of these cases, policies have exacerbated inequality and segregation.

An exception to this trend is the increase in funding offered in Chile to low-income students. Although this support has been associated with improvements in standardised test performance, it has also contributed to the expansion of the private school market. At the same time, hundreds of traditional public schools have been closed, increasing concerns about socioeconomic segregation. Private schools function as magnets for relatively more privileged families, which may further exacerbate inequality. Instead of focusing on equity, there is sufficient evidence that Latin American states have focused on boosting the development of the private school industry.

Faced with the challenges posed by increasing taxes or, failing that, increasing funding and support for public education, various governments have chosen to intensify their dependence on the private educational sector. In Colombia, for example, the government has decided to pay private schools to admit students who do not find places in the public system (Diaz-Rios et al., 2021). Argentina and Uruguay have been shown to have partially outsourced curriculum development and teacher training (Pereda, 2018; Sverdlick, 2020). However, increasing dependence on the private sector can have adverse effects. This is evidenced by the extent to which states are unable to supervise and hold private providers accountable. In Colombia, the absence of supervision led to a proliferation of uncontrolled low-quality private schools, judging by the low performance and high turnover of teachers (Diaz-Rios et al., 2021). In Brazil, Social Impact Bonds (SIBs), which supposedly only deliver public funds to private providers once these achieve pre-established goals, are presented as a potential solution to this problematic; however, they are not without their controversies, as they pose ethical dilemmas about the desirability of restricting access to interventions that could be beneficial to certain students.

On the other hand, low-fee private schools have filled the gap left by public institutions. These schools take advantage of low- and middle-income families' dissatisfaction with public schools, which are perceived to be of low quality. In marginalised

contexts, it is not uncommon for families to be limited to choosing between saturated public schools or, strictly speaking, no public option at all. While small-scale independent low-fee private schools (LFPSs) have been previously documented in the region (Verger et al., 2014), this report highlights the incursion of an LFPS corporate model in Brazil (Montes, 2020; Siqueira, 2017). Although these corporations claim the mission of providing access to high-quality education for low-income families, existing studies have failed to demonstrate any conclusive evidence as to whether such schools actually offer higher quality education. Rather, studies have expressed concerns that these schools may be selling a mere illusion to low-income families while contributing to an increase in school segregation (Montes, 2020).

The implications of school segregation have been a widely discussed topic, however, it is important to note that teachers also face inequalities. It has been widely recognised that the financial viability of private schools is often only possible thanks to the low salaries and benefits offered to their teaching staff. This problem was explored in studies on charter schools in Colombia, where it was shown that these institutions remunerate teachers below what they would earn in traditional public schools, given their qualifications and experience. In addition, the employment of teachers is more unstable, since they are offered short-term contracts that, in most cases (86%) are for less than or equal to eleven months (Edwards & Hall, 2017). Although it is well known that both private and charter schools exploit teachers in such ways, this review found few studies that directly address this trend, so pointing to an opportunity for future research.

Teachers have been examined more closely in relation to schemes for school autonomy and accountability. It could be assumed that this approach towards educational reform is preferable, since it represents the opposite of deregulation of the sector. Instead of leaving schools to their own devices, this model of educational governance oversees institutions and sets awards and punishments based on student performance in standardised tests. In theory, this approach should give schools some freedom and flexibility (or autonomy). However, in practice, the punitive nature of these policies tends to encourage uniformity and a type of teaching focused on standardised testing. In addition, in quasi-market contexts, these reforms encourage schools to seek competitive advantages, for example, by strategically selecting students, choosing only those who are most likely to get good results (Falabella, 2020; Verger & Parcerisa, 2017). In contexts of stricter centralised control, these reforms have been linked to increases in administrative workloads, such as the development of school improvement plans and projects to raise student performance, so diverting

teachers' attention from other central aspects of their work (Anzures, 2020; Bocchio & Ginberg, 2019). Such policies thus also promote a culture of comparison among teaching staff, with individualisation of responsibilities for student performance, a decrease in self-esteem, and a general move away from an ethic of care, cooperation and collaboration (Andrade, 2021; Falabella, 2019).

Despite the general dissatisfaction of teachers with the privatisation reforms discussed above, states have shown reluctance to revoke or modify these significantly, underlining the importance of the resistance of social movements and civil society. There are multiple examples throughout Latin America of teachers and their unions collaborating with students, academics and social movements to combat standardised tests and punitive accountability schemes for teachers, in addition to advocating in favour of increases in public education funding. In Chile, the now famous student movement went even further, demanding free, egalitarian, critical and transformative public education, distanced from commercialisation (Inzunza et al., 2019). Although this student movement did not manage to fulfil all its objectives, it did influence national politics and eventually led to some legislative changes. These changes are centred on the elimination of co-payments by families for private schools that receive state subsidies, higher standards for teacher training institutions, the creation of an induction system for new teachers, and the reduction of teaching workloads, among others. On the one hand, these examples can be seen as inspiring, in the sense of demonstrating that a broad coalition of actors can come together in support of public education. On the other hand, changes in policy may have unintended effects. In the aforementioned case of Chile, continuation of the voucher system and an increase in funding for private schools (approved in the spirit of equity and additional support for low-income students) has led to more public funds being diverted to this sector.

Perhaps the lesson here is that it is more feasible (though by no means easy) to secure modest reforms, such as those mentioned above, to existing systems than it is to achieve system change. States do not easily give up the evaluative and punitive powers that they have naturalised and that are based on classifications of student and teacher performance. Nor will those with vested interests in educational markets, whether private school providers or the families who pay for these, quickly give up the benefits they accumulate. Public education in Latin America therefore still fails to represent the vision promoted by social movements of a robust, well-funded, inclusive, equitable and democratically managed system. The question for the future is: How will such movements respond to the persistent push towards privatisation documented in this report? In this regard, there are some initiatives that inspire cautious optimism. Examples documented in recent literature outside the scope of this review

are not explicitly related to the privatisation dispute, rather representing examples of teacher unions and social movements working together on multiple fronts in the interest of multiple objectives related not only to the improvement of traditional public education, but also to the realisation of alternative approaches to 'development' and the role of education in the imagination of such alternatives (Bracho, 2019; Chambers-Ju, 2024; Tarlau, 2019; Roberts, 2024).

Resistance to privatisation is particularly relevant in a context of the generalisation of various forms of privatisation through policy formulation. As has been pointed out, there are multiple types of private actors connected to the global education industry operating in Latin America. Moreover, these do not act in isolation, but in coordination. Multi- and bilateral organisations, business coalitions, think tanks, corporations and philanthropic organisations are not only all interconnected, but also share a common ideology of reform and employ similar strategies to advance their agendas. As has been presented, these organisations are involved in data collection, the production of knowledge and the dissemination of ideas to shape perceptions about the 'problems' of public education and what is required to solve these. They work closely with states to assess the supposed needs of their education systems and to design political responses to these that invariably lead to more business opportunities for the organisations in question and for others in the global education industry.

This report provides examples of how private actors work with each other and with states at different levels (local, national, and global) and across different regions (within and beyond Latin America) when their interests align and political windows so allow. Thus, although there may be competition between actors — for example, for government contracts — in general terms, they all contribute to the creation of new markets and business opportunities. As Rhoten (2000) suggested, it can be said that these organisations work in harmony to create the global-local conditions required for the privatisation of education in multiple areas. The shared ideology and the cooperation between actors constitute a phenomenon with which social movements and civil society fundamentally cannot compete. The conditions of possibility are thus strongly inclined in favour of privatisation, although there have been some inspiring examples of struggle against harmful educational reform.

Interestingly, these conditions of possibility seem to prevail even though the region has, to some extent, veered to the left in recent years. Since 2018, Argentina, Bolivia, Brazil, Colombia, Guatemala, Mexico and Peru have elected presidents from the centre-left (Freeman, 2023). Nonetheless, as Freeman (2023) points out, a key difference

between this wave of left-wing presidents and those of the previous wave (who came to power in the 2000s) is that they do not have the same kind of support from popular or social movements. In the Words of Freeman (2023):

When the left first swept into power across the region in the 2000s, the region's political parties were formidable. Chávez, Rafael Correa, Evo Morales, Lula, Ricardo Lagos and Mujica differed from each other in most regards, but they all shared one quality: They had strong parties or social movements behind them, strengthening their hands as they negotiated with (or openly confronted) their opposition. (para. 7)

In the absence of this support base, politicians have found it difficult to move forward with their agendas. Although Freeman (2023) highlights the struggles related to reform of the tax system, the expansion of the welfare state and the promotion of sustainability, the argument can also be extended to education. Leftist presidents have had to moderate their proposals and make alliances with conservatives.

In this context, not only are radical proposals for educational reform out of the question, but at the same time, the notions of equity employed by private actors become more politically attractive. Without the necessary political capital to attack the foundations of the voucher system and standardised testing, for example, a more effective political strategy is to increase funding to private schools aimed at disadvantaged students, or to provide professional support for teachers who are forced to work in regimes governed by standardised tests. However, as has been suggested, even these types of policies have only emerged in the context of pressure from social movements and civil society. This reality is an indication of the fact that the political centre of gravity in the region is firmly located to the right, despite the election in recent years of presidents with centre-left orientations.

In conclusion, it is difficult to predict with certainty how privatisation trends will evolve. Nonetheless, if the last ten years are any indication, privatisation will continue to evolve and expand on multiple fronts. It is hoped that this report will serve to increase understanding of the direction these trends have taken since 2013. At the same time, multiple areas in which more research is needed have been highlighted throughout the report. These areas include, but are not limited to:

- The lack of studies on educational privatisation in Andean, Central American and Caribbean countries;

- The ways in which multi- and bilateral international organisations connect with other types of private actors, and the way in which they may create profitable opportunities for these private actors, such as business coalitions, think tanks and private education providers;

- The role of organisations that represent and facilitate the circulation of intra-regional expertise (rather than focusing on the role of better-known organisations from other regions);

- The influence and strategies of business coalitions, think tanks and corporate philanthropies, particularly those based in Latin America;

- The strategies and tactics through which private schools exploit teaching labour (e.g., by paying lower salaries, not complying with labour regulations, requiring additional work without compensation, etc.);

- The nature and consequences of public funding to private organisations that have received less academic interest, such as religious schools;

- The effects and implications of Social Impact Bonds (SIBs) and the growing financial ecosystem conducive to this type of investment.

While this report has documented the trends evidenced in the existing literature, and while some recent studies demonstrate the continuation of historical trends, there are other trends and developments that represent new frontiers of privatisation. These areas also need further investigation.

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Note: Asterisks indicate that the source was included in the final corpus for the systematic literature review.

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Appendix A. Literature search syntax

TITLE-ABS-KEY("Privati?ation" OR "quasi-market*" OR "per-capita funding" OR "new public management" OR "NPM" OR "public private partnership" OR "public-private partnership" OR "PPP" OR "public-private" OR "voucher" OR "school-based management" OR "private sector participation" "religious schools" OR "private-sector supply" OR "private schools" OR "charter school*" OR "markets in education" OR "school autonomy" OR "accountability" OR "corporati?ation" OR "education industry" OR "education marketplace" OR "liberali?ation" OR "marketi?ation" OR "commerciali*ation" OR "low-fee private schools" OR "Network governance" OR "Philanthrop*" OR "International orgs" OR "neoliberalism" OR "education reform" OR "outsourcing" OR "school choice" OR "decentralisation" OR "for-profit schools" OR "LFPS" OR "LFP" OR "privatizacion" OR "cuasi-mercado" OR "cuasimercado" OR "financiamiento per capita" OR "financiacion por capita" OR "nueva gestion publica" OR "alianzas publico-privadas" OR "alianzas publico privadas" OR "app" OR "publico-privado" OR "escuelas privadas" OR "autonomia escolar" OR "participacion del sector privado" OR "mercado educativo" OR "rendici?n de cuentas" OR "escuela concertada" OR "escuela subvencionada" OR "liberalizacion" OR "mercantilizacion" OR "escuelas religiosas" OR "corporatizaci?n" OR "gobernanza en red" or "filantropia" OR "organizaciones internacionales" OR "neoliberalismo" OR "reforma educativa" OR "subcontratación" OR "elección escolar" OR "descentralizacion" OR "escuelas con animo de lucro") AND TITLE-ABS-KEY ("argentina" OR "barbados" OR "belize" OR "bolivia" OR "bra*il" OR "cayman islands" OR "chile" OR "colombia" OR "costa rica" OR "cuba" OR "cura*ao" OR "dominica" OR "dominique" OR "dominican republic" OR "republica dominicana" OR "el salvador" OR "grenada" OR "guatemala" OR "ha*ti" OR "honduras" OR "jamaica" OR "me*ico" OR "nicaragua" OR "panama" OR "paraguay" OR "peru" OR "puerto rico" OR "st. kitts & nevis" OR "st lucia" OR "st vincent and the grenadines" OR "sint maarten" OR "suriname" OR "trinidad and tobago" OR "turks and caicos islands" OR "uruguay" OR "vene*uela" OR "latin america" OR "latinoamerica" OR "america latina" OR "suramérica" OR "south america" OR "caribe" OR "caribbean" OR "america del sur") AND TITLE-ABS-KEY("school" OR "escuela" OR "schooling" OR "educa*ion" OR "educa*ional" OR "vocational training" OR "VET" OR "TVET" OR "professional training" OR "teaching" OR "teacher") AND SUBJAREA(MULT OR ARTS OR BUSI OR DECI OR ECON OR PSYC OR SOCI) AND NOT (TITLE("higher education" OR "universit*" OR "tertiary" OR "health")) AND (EXCLUDE(SUBJAREA,"MEDI") OR EXCLUDE(SUBJAREA,"PSYC") OR EXCLUDE(SUBJAREA,"NURS") OR EXCLUDE(SUBJAREA,"COMP") OR EXCLUDE(SUBJAREA,"ENGI") OR EXCLUDE(SUBJAREA,"ENVI") OR EXCLUDE(SUBJAREA,"HEAL") OR EXCLUDE(SUBJAREA,"AGRI") OR EXCLUDE(SUBJAREA,"NEUR") OR EXCLUDE(SUBJAREA,"MATH") OR EXCLUDE(SUBJAREA,"EART") OR EXCLUDE(SUBJAREA,"BIOC") OR EXCLUDE(SUBJAREA,"PHAR") OR EXCLUDE(SUBJAREA,"ENER") OR EXCLUDE(SUBJAREA,"CENG") OR EXCLUDE(SUBJAREA,"MATE") OR EXCLUDE(SUBJAREA,"CHEM") OR EXCLUDE(SUBJAREA,"DENT") OR EXCLUDE(SUBJAREA,"VETE") OR EXCLUDE(SUBJAREA,"PHYS") OR EXCLUDE(SUBJAREA,"IMMU"))

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