7. How and why policy design matters: understanding the diverging effects of public–private partnerships in education¹

Antoni Verger, Mauro C. Moschetti, and Clara Fontdevila

INTRODUCTION

In different policy circles, Public–Private Partnerships (PPPs) are increasingly perceived as an innovative policy approach to promote better quality education and provide disadvantaged populations with new educational opportunities. Many governments, international organizations and other key educational stakeholders expect PPPs to bring together the best of the private and public worlds, namely the equity orientation of the public sector and the efficiency and innovation of the private sphere (see Osborne and Gaebler, 1992). In education, PPPs can be broadly defined as legal arrangements through which the public sector contracts the private sector for the delivery of educational services for a certain period of time. These contracts should specify performance criteria and goals, and identify whether the public and the private sectors share the financial risks entailed in the delivery of the service (Patrinos et al., 2009). Nonetheless, beyond this broad and legalistic definition, PPP arrangements might follow very diverse rationales and crystallize

¹ An extended version of this chapter can be found in: Verger et al. (2020). Its content is based on the background paper that the same authors elaborated to inform the deliberations that preceded the adoption of the Abidjan Principles on the Right to Education.

in very different policy modalities, which places PPPs in an ambiguous policy category.

The most relevant PPP modalities in educational delivery are vouchers, charter schools and supply-side subsidies for private schools. Although there might be important differences as we shall see, overall, *voucher programmes* represent a significant departure from traditional and bureaucratic forms of educational funding and involve competitive funding formulas that allot public funds to families for use in private or public schools of their choice. *Charter schools* are relatively autonomous schools that are publicly funded but privately managed and exempt from following certain public regulations. *Supply-side subsidies* for private schools generally involve the provision of public funds to existing privately owned schools to cover part of (or all) their operating costs, via lump sums or the direct payment of specific inputs, such as teacher salaries or educational resources (Boeskens, 2016; Patrinos et al., 2009).

PPPs' growing popularity for educational delivery contrasts with insufficient supporting evidence. In fact, existing research on the outcomes of PPPs often yields contradictory results across multiple impact dimensions, including expanding access, improving educational results, and distributing educational opportunities or promoting educational innovations (Aslam et al., 2017; Day Ashley et al., 2014; Languille, 2016; Verger et al., 2019; Waslander et al., 2010). Diverging effects can be partially explained by the fact that policy-design variables and context specificities strategically mediate the enactment and impact of PPPs. However, within some policy and academic circles—such as international development and comparative education—the PPP debate is often too generic and fails to adequately differentiate the extent to which PPP modalities work, for whom, and in which sense.

This chapter aims to understand how and why policy design operates in order to analyse the differential impact of PPPs on education. Specifically, the chapter addresses the question of how policy options mediates the effects of PPPs in education in several dimensions (with a focus on learning outcomes and equity). The study also aims to contribute to the advance of a more nuanced and evidence-informed discussion on the potential benefits, challenges and disadvantages of PPPs in educational delivery.

The chapter is organized as follows: The first section builds a conceptual and analytical framework to classify different PPP modalities according to a series of policy-design variables. The second section presents the methodology and scope of the study. The third section

discusses the main findings of our research for this chapter, including an overview of the impact of each PPP model, both in aggregate terms and according to specific policy-design variables. We conclude by discussing the main findings of the study and distilling its main research and policy implications.

POLICY MATTERS: A CONCEPTUALIZATION OF DIFFERENT PPP MODELS AND RELATED POLICY OPTIONS

According to the World Bank’s seminal report *The Role and Impact of Public–Private Partnerships in Education* (Patrinos et al., 2009), PPPs cover a continuum of policy arrangements with different levels of engagement between the public and the private sectors (see Figure 7.1). This continuum ranges from a nascent stage—in which private schools exist independently of the state—to an integral stage—in which education is entirely provided by the private sector under a voucher scheme (Patrinos et al., 2009). This classification spectrum can be read as a sequence of educational governance models that transition from a bureaucratic and centralized governance model through to a fragmented and postbureaucratic governance approach in which unleashed market forces dominate.

Figure 7.1 The World Bank PPP continuum concept

This categorization has widely influenced the fields of comparative and international education due to its comprehensive nature. The categories assume that PPP models intrinsically calibrate market dynamics, with vouchers schemes being the market driver par excellence (in the sense that these schemes’ main objectives are to expand families’ choice opportunities and thus promote competition between schools). Nonetheless, in so doing, this categorization neglects the significant differences that

might exist within each PPP model. For instance, voucher schemes are more or less likely to trigger market competition, depending on whether they are targeted or universal, whether they provide partial or complete funding, and whether their territorial scope is local, regional or national (Levin, 2002; Moe, 2008). The market dynamics that charter schools programmes generate can also differ significantly, according to the degree of school autonomy, the diversification of their educational offerings, or the freedom of choice for families they pursue (Bulkley, 2005). As we argue in this chapter, these and other policy-design variables are crucial for understanding the heterogeneous nature of PPPs and their diverging outcomes.

Policy-Design Variables in Educational PPPs

Policy design is a key phase in policy formulation in which policy interventions are operationalized in concrete sets of tools and regulations. Despite often being conceived as technocratic, policy-design decisions tend to respond to political agendas and ideological preferences (Jordan & Turnpenny, 2015). This is especially so if we consider ambiguous policy programmes, such as PPPs, which can be guided by very contrasting values (such as academic excellence, educational equity, or freedom of school choice). Indeed, the final tools in which programmes crystallize can incline the intentions and logics underpinning the policy in rather different directions. For this very reason, specific policy-design decisions might explain the divergent outcomes of apparently similar policy interventions.

In this section, we unpack and present the main policy-design variables that contribute to the programmatic configuration of PPPs. We first reflect on those policy variables and options that are common to most PPP modalities before turning to those variables that are specific to each PPP modality.

Profit-making

PPP programmes can provide access to for-profit organizations or exclude them as eligible providers. When PPPs provide access to for-profit institutions, they intend to foster competition on a bigger scale and are expected to expose public schools to more intensive private competition (Hoxby, 1994). Many market policy advocates see profit-making as the strongest means available for incentivizing schools to meet consumer demand efficiently, as well as for facilitating the rapid expansion

of private provision and—above all—for unleashing the market's full potential (see Robertson, 2015). However, in basic education, for-profit operators are allowed to operate only in a few educational systems, given the concerns over the risk of corruption, or of profit being made at the expenses of quality or of public funding contributing to private gains.

Students' selection

Regulations over student admissions also vary across and within different PPP modalities. Some proponents of a free-market system argue that, for high-quality schools to participate in PPP programmes and turn the educational system into one that confers real choice, regulations regarding admissions should be kept to a minimum (Parry, 1996). Also, in contexts where PPPs have been adopted to ensure the economic viability of religious schools, or to preserve school diversity (as with most subsidy programmes), schools are more likely to enjoy greater discretion over student admission procedures. However, PPP arrangements that follow an equal opportunity rationale frequently prohibit the possibility of schools selecting students.

Tuition add-ons

Some PPP programmes encourage—or at least permit—families to add to the value of the voucher or subsidy and therefore allow schools to charge extra fees accordingly. Allowing parent add-ons incurs the risk of generating social segmentation in schools, yet can also be an effective way of encouraging private schools to participate in PPP programmes, thus maximizing the allegedly virtuous effects of competition (Moe, 2008). In some instances, permitting tuition fee add-ons may be justified on the grounds of cost-efficiency and quality. They are also expected to promote equity, since add-ons generate additional resources in the educational system that can be invested in the most socially disadvantaged schools or families (Narodowski et al., 2016; Van Der Berg et al., 2017). There are also those that argue that fixed-amount vouchers might lead to underfunding, thus restraining potential pedagogic innovation and improvement (see Bellei & Vanni, 2015).

Voucher programmes' specificities

Voucher schemes vary substantially, depending on their underlying 'structure of choice' and the social values they pursue (Levin, 2002; Moe, 2008). Policymakers can calibrate the degree of choice and/or

educational opportunity they wish to promote via vouchers by deciding between the following options.

Universal or targeted vouchers

Vouchers can be made available to every family with school-age children or exclusively to a specific group. A universal voucher programme would, theoretically, extend greater freedom of choice to families and generate higher levels of competition between schools (Moe, 2008). In contrast, targeted vouchers tend to follow an affirmative action rationale by granting vulnerable groups (including socioeconomically disadvantaged families and children with special educational needs) a wider choice of schools (Morgan et al., 2013; Ben-Porath, 2009).

Same-amount voucher or scaled voucher

Voucher systems may provide either the same, or a different, scaled amount of money per child, based on a series of pre-defined criteria, usually of a socioeconomic nature.² While giving all vouchers the same amount is often seen as the most straightforward market solution, scaled vouchers are more likely to be adopted if the programme is expected to serve an equity agenda. This is because scaled vouchers offer the chance to compensate for socioeconomic differences between families, in addition to expanding their capacity to choose (Levin & Belfield, 2003). Furthermore, it is also because they are expected to compensate for the (assumedly) greater costs of educating disadvantaged students and to incentivize schools to serve low-income populations (Moe, 2008).

Charter schools: the mediating role of management organizations

Despite some common attributes, differences between charter school regulations abound. An important design variable in charter school programmes concerns the *nature* and *scale* of the private operators. Charter schools might be managed by independent operators or by big charter management organizations (CMOs), frequently organized in the form of school chains. The former option is indeed more closely aligned to the original conception of the charter schools, as these were primarily envisioned as locally managed and highly autonomous educational establishments that were presumed more likely to incentivize innovative

² Although behavioural problems, learning disabilities or other educational difficulties might be considered as well (Levin, 2002).

and context-relevant education (Scott & DiMartino, 2009). However, some charter school advocates defend the presence of CMOs, claiming they can generate economies of scale and encourage dynamics of mutual support and pedagogic exchange within the school chain.

METHODS AND SCOPE

This research analyses the impact of PPPs on education according to a series of programme design features. To this end, we rely on a *scoping review* of the literature, informed by 199 impact studies on different modalities of PPPs published between 1992 and 2018.³ The papers reviewed were identified with a keyword-based search on *Scopus*. The selection process relied on successive screening sequences based on a protocol that restricted the scope of the review to studies that are empirically driven, focus on the effects of specific PPP modalities, are explicit on the main design characteristics of the studied PPP programmes and focus on primary and/or secondary education. The corpus of papers included in the review was analysed and synthesized following a charting approach so that, for each primary document, key items of information were collected and sorted for a selection of main attributes.

Besides some basic descriptors, (i.e. year of publication, methodological approach, field, etc.), two main groups of attributes were contemplated—namely, policy-design variables and assessed impact dimensions. *Policy-design variables* comprised the range of policy options discussed in the previous section—including those variables common to all PPP varieties, as well as those specific to certain modalities, whereas *impact dimensions* referred to a selection of frequently discussed policy effects organized around common themes. We focused mainly on two dimensions that are more present in the literature—namely, *learning outcomes* (e.g. any measure related to academic achievement and student performance) and *equity* (e.g. any measure of the effect of PPP programmes over learning inequalities, school segregation and the inclusion of students with special needs).

For each of the policy dimensions analysed by a given paper, four possible *directions of impact* were considered—namely, positive, negative,

³ Further detail regarding the search selection procedures used in this review, as well the list of the references constituting the final corpus of the study, can be found in an extended version of this chapter (see Verger et al., 2020).

neutral or mixed. When the codes assigned to the multiple dimensions addressed by the article differed, the *global impact* of the policy was determined mixed, and the article was coded as such.

The information collected in the coding process was organized and summarized in a database that allowed us to calculate the frequency of the coded effect, as well as to identify recurrent patterns of effects in relation to particular policy designs. Results are presented in a quantitative format for the sake of clarity and conciseness. However, it should be noted that our study is not conceived as a probabilistic undertaking, but rather as a mapping exercise. In this sense, figures are only oriented at capturing the state of the literature; they are not meant to be extrapolated in order to determine broader trends.

Table 7.1 provides an overview of the corpus of studies covered. As observed, the reviewed studies are unevenly distributed in terms of country focus, methodology, year of publication and impact dimension.

Table 7.1 Distribution of primary documents according to selected dimensions

<i>Impact dimension</i>		<i>Policy addressed</i>	
Learning outcomes	84	Voucher programmes	84
Equity-related categories	98	Charter school programmes	100
Teacher-related categories	15	Subsidies programmes	15
Family-related categories	9		
Innovation	8		
Curriculum breadth	8		
Student behaviour	2		
Grade inflation	2		
<i>Country</i>		<i>Methodological approach</i>	
USA	118	Quantitative approach	151
Chile	35	Qualitative approach	32
UK	8	Mixed methods	9
Other OECD*	21	Literature review/other	7
Other non-OECD	13		
Comparative studies	4		

* Organisation for Economic Co-operation and Development.

Our results should be read without losing sight of such imbalances—which reflect essentially the priorities and prime concerns that have guided research on PPPs during the last decades.

Finally, it is important to bear in mind that a focus on policy-design variables, as established in regulatory frameworks, necessarily entails certain limitations given the fact that real practices do not always adhere strictly to the regulations in place. For instance, even in those systems where student selection or tuition add-ons are forbidden, schools might adopt a number of informal strategies to try to screen students and/or charge fees to families. A more accurate understanding of the relationship between policy design and policy outcomes would require exploration beyond formal arrangements and paying greater attention to enactment dynamics, as well as to the effects of weak legislation or potential regulatory gaps.

UNPACKING PPP EFFECTS: MAIN FINDINGS OF THE REVIEW

In this section, we first provide an overview of the impact of each PPP modality in aggregated terms. Second, we break down our results according to the most relevant policy-design variables for each case.

Impact Overview

Altogether, publications reporting negative effects of PPPs are manifestly more common than studies reporting positive effects—although studies finding neutral and mixed results also abound (Figure 7.2). In the reviewed literature, charter schools and subsidy programmes are reported to generate negative effects more frequently than voucher schemes. As shown in Figure 7.3, voucher schemes offer a slightly more mixed picture in terms of aggregated impact. Studies reporting positive and mixed effects appear to be slightly more frequent for voucher schemes than for charters and subsidies.

However, this aggregated approach offers only limited insight. When we disaggregate the data according to different impact dimensions, the effects of PPPs differ notably. Indeed, as Figures 7.4 and 7.5 show, some remarkable differences between PPP modalities can be found in relation to the most often studied impact dimensions (learning outcomes and equity-related outcomes). When it comes to learning outcomes (Figure 7.4), studies focusing on voucher programmes report positive effects

Figure 7.2 Global impact of education PPPs (n = 199)

Figure 7.3 Global impact according to policy approach (n = 199)

more frequently (and negative effects less frequently) than studies on subsidies and charters. Mixed results on learning outcomes are significant in all cases and neutral results are comparatively over-represented for subsidy programmes. Conversely, the three different PPP modalities

Figure 7.4 Impact on learning outcomes according to PPP programme (n = 84)

Figure 7.5 Impact on equity according to policy approach (n = 98)

appear to have a more similar pattern of results in relation to equity-related dimensions (Figure 7.5). In these cases, the reported effects of PPPs, independently of their modality, are predominantly negative.

Ultimately, the apparently contradictory and inconsistent nature of the results sketched above are indicative of the limitations of adopting a bird’s eye perspective to assess the impact of PPPs. A design-sensitive approach—which we argue for in this chapter and develop below—is better equipped to advance a more fine-grained understanding of the effects of PPP interventions on education.

Voucher Programmes

Universal vs. targeted vouchers

This research suggests that targeted vouchers perform significantly better than universal vouchers. As shown in Table 7.2, positive effects are reported in about half of the studies on targeted voucher programmes, whereas studies on universal vouchers only report positive effects in about 20% of the cases.

Table 7.2 *Voucher programmes’ impact according to scale—paper count and row percentage*

	Negative		Neutral		Mixed, ambiguous or inconclusive		Positive	
	Count	%	Count	%	Count	%	Count	%
<i>Global impact</i>								
Targeted	3	12.5	4	16.7	5	20.8	12	50.0
Universal	22	37.9	7	12.1	16	27.6	13	22.4
<i>Learning outcomes</i>								
Targeted	0	0.0	1	10.0	0	0.0	9	90.0
Universal	1	3.4	7	24.1	10	34.5	11	37.9
<i>Equity-related dimensions</i>								
Targeted	2	15.4	3	23.1	4	30.8	4	30.8
Universal	24	75.0	3	9.4	2	6.3	3	9.4

A disaggregated analysis shows that universal vouchers are unlikely to yield any gains in terms of equity, whereas targeted vouchers perform

much better from this perspective. The differences in academic performance between universal and targeted vouchers are also important. Targeted vouchers are reported to yield overall positive results on learning outcomes, whereas research on universal vouchers finds mixed or neutral effects much more frequently.

These findings could be explained by the fact that universal vouchers, by placing emphasis on school competition, tend to exacerbate school segregation. Research observes that the overtly competitive environments created by universal voucher schemes tend to benefit middle-class and upper-class families with greater ability to navigate the system and effectively exercise choice (Alves et al., 2015; Gewirtz et al., 1995; Olmedo, 2008). Universal vouchers also seem to generate more incentives for schools to try to recruit the best students and those perceived as less costly to educate, and to discriminate against less academically skilled students or against those with special educational needs (Carrasco et al., 2017; Hsieh, & Urquiola, 2006).

For-profit vs. not-for-profit participant schools

As captured by Table 7.3, voucher schemes in which participation is limited to non-profit providers are more frequently found to deliver positive results than schemes that do not restrict profit-making. The very limited evidence in this area suggests the need for caution in the interpretation of the results—and does not allow for their disaggregation by dimension of impact. However, these findings are ultimately consistent with the arguments made by a number of scholars who have problematized the fact that there is no guarantee that for-profit schools will re-invest earnings to improve educational quality, or who have argued that public funding does not necessarily end up following demand, but rather corporate income (Bellei & Vanni, 2015).

Tuition add-ons

The reviewed evidence suggests that negative results are more frequently reported for voucher programmes that allow parental co-funding (Table 7.4), especially in relation to equity. Such findings are consistent with recent studies highlighting how add-ons build market hierarchies and create sorting dynamics that lead to socioeconomic stratification and undermine equity in education. As documented in Chile, the voucher value becomes a formal ‘suggested retail price’, whereas actual tuition prices ultimately display great variability according to the amount of the add-on tuition charged by private voucher schools (Mizala & Torche,

Table 7.3 *Voucher programmes’ impact according to profit restrictions—paper count and row percentage*

	Negative		Neutral		Mixed, ambiguous or inconclusive		Positive	
	Count	%	Count	%	Count	%	Count	%
<i>Global impact</i>								
Profit not allowed	1	16.7	0	0.0	1	16.7	4	66.7
Profit allowed	24	31.6	11	14.5	20	26.3	21	27.6
<i>Learning outcomes</i>								
Profit not allowed	1	16.7	0	0.0	0	0.0	5	83.3
Profit allowed	0	0.0	8	25.0	10	31.3	14	43.8
<i>Equity-related dimensions</i>								
Profit not allowed	1	100.0	0	0.0	0	0.0	0	0.0
Profit allowed	24	54.5	6	13.6	6	13.6	8	18.2

Table 7.4 *Voucher programmes’ impact according to add-ons restrictions—paper count and row percentage*

	Negative		Neutral		Mixed, ambiguous or inconclusive		Positive	
	Count	%	Count	%	Count	%	Count	%
<i>Global impact</i>								
Not allowed	5	17.9	6	21.4	8	28.6	9	32.1
Allowed	18	40.9	4	9.1	7	15.9	15	34.1
<i>Learning outcomes</i>								
Not allowed	0	0.0	3	23.1	3	23.1	7	53.8
Allowed	1	4.5	5	22.7	3	13.6	13	59.1
<i>Equity-related dimensions</i>								
Not allowed	4	28.6	3	21.4	3	21.4	4	28.6
Allowed	18	75.0	2	8.3	2	8.3	2	8.3

2012). The result is usually a highly segmented educational marketplace that reflects the differential purchasing power of households.

Same-amount vouchers vs. scaled vouchers

Since scaled vouchers aim to balance the field for disadvantaged families, this type of voucher should perform better than same-amount vouchers in terms of equity. However, existing research reports practically the same positive results for same-amount vouchers as for scaled vouchers and—paradoxically—more negative results for scaled vouchers than for same-amount voucher programmes (see Table 7.5). These results counter the equity expectations informing the theory of change that underpins most scaled voucher programmes. Given the limited literature on the matter, further research is needed to gain a better understanding of the social mechanisms that are more likely to explain such patterns. Future research could focus on examining whether the differences in value scales are sufficient to counteract schools’ incentives for selecting students, or whether scaled vouchers might aggravate student selection by ‘signalling’ a particular type of student.

*Table 7.5 Voucher programmes’ impact according to amount—
paper count and row percentage*

	Negative		Neutral		Mixed, ambiguous or inconclusive		Positive	
	Count	%	Count	%	Count	%	Count	%
<i>Global impact</i>								
Differential	15	53.6	1	3.6	3	10.7	9	32.1
Uniform	9	18.8	9	18.8	15	31.3	15	31.3
<i>Learning outcomes</i>								
Differential	0	0.0	3	27.3	1	9.1	7	63.6
Uniform	1	3.7	5	18.5	8	29.6	13	48.1
<i>Equity-related dimensions</i>								
Differential	13	72.2	1	5.6	1	5.6	3	16.7
Uniform	11	47.8	4	17.4	4	17.4	4	17.4

Student selection

Voucher schemes that allow student selection yield slightly more positive results than non-selective schemes, especially when looking at learning outcomes (Table 7.6). This might be due to the fact that studies on vouchers tend to report results of private voucher schools as compared to conventional public schools' students, and do not necessarily conduct a system-level analysis. As Hsieh and Urquiola (2006) show, the main effect of the Chilean universal voucher programme has been to facilitate the exodus of the middle-class from non-selective public schools to selective private schools. While learning outcomes in the latter have improved, the authors find no evidence that the school choice dynamics triggered by the voucher system have improved aggregate academic outcomes in the country.

Table 7.6 *Voucher programmes' impact according to student selection restrictions—paper count and row percentage*

	Negative		Neutral		Mixed, ambiguous or inconclusive		Positive	
	Count	%	Count	%	Count	%	Count	%
<i>Global impact</i>								
Not allowed	16	37.2	8	18.6	7	16.3	12	27.9
Allowed	7	22.6	2	6.5	10	32.3	12	38.7
<i>Learning outcomes</i>								
Not allowed	0	0.0	5	31.3	2	12.5	9	56.3
Allowed	1	4.5	3	13.6	7	31.8	11	50.0
<i>Equity-related dimensions</i>								
Not allowed	13	54.2	3	12.5	4	16.7	4	16.7
Allowed	10	71.4	2	14.3	0	0.0	2	14.3

Most studies on the effects of voucher schemes tend to focus on learning outcomes as the main dependent variable. However, the existing studies focusing on the impact of vouchers on equity dimensions tend to report negative results more frequently. As suggested by Table 7.6, when selection practices are allowed, vouchers have predominantly negative consequences for equity. This pattern is likely to be the consequence of

the increase in social and school segregation entailed by student selection practices. Numerous scholars have noted that, when schools face market pressure, they are more likely to compete for students perceived as easier to educate—usually, those from wealthier backgrounds, or that are part of certain ethnic, social, or religious groups regarded as desirable (see, for instance, Jennings, 2010; Van Zanten 2009).

Charter Schools

For-profit vs. not-for-profit participant schools

While evidence regarding the mediating role of the for-profit variable is limited, our review suggests that profit-making restrictions do not alter the direction of the educational effects of charter school programmes substantially. Nonetheless, the results are slightly more positive for charter programmes that do not allow operators with profit motives, or when comparing not-for-profit charter schools to for-profit charter schools. (Table 7.7).

Table 7.7 Charter programmes' impact according to profit restrictions—paper count and row percentage

	Negative		Neutral		Mixed, ambiguous or inconclusive		Positive	
	Count	%	Count	%	Count	%	Count	%
<i>Global impact</i>								
Not-for-profit	10	41.7	4	16.7	2	8.3	8	33.3
For-profit	17	54.8	2	6.5	5	16.1	7	22.6
<i>Learning outcomes</i>								
Not-for-profit	1	10.0	3	30.0	0	0.0	6	60.0
For-profit	4	36.4	1	9.1	2	18.2	4	36.4
<i>Equity-related dimensions</i>								
Not-for-profit	7	58.3	4	33.3	0	0.0	1	8.3
For-profit	8	88.9	0	0.0	1	11.1	0	0.0

As shown by Table 7.7, when we disaggregate the results in terms of impact on learning outcomes and equity, a similar pattern can be identified, with for-profit motives being more associated with worse effects

regarding equity and—to a lesser extent—learning outcomes. The findings on equity are usually attributed to the fact that for-profit operators have more market oriented ethos and have greater economic incentives to select the most able students, or to avoid special needs or disadvantaged students (Lacireno-Paquet et al., 2002).

CMOs vs. independent charter schools

As Table 7.8 shows, charter schools operated by independent providers are reported to obtain better results than charter schools operated by CMOs. However, the number of studies that place emphasis on the scale of the school operator is relatively low, which means that this comparison needs to be approached with caution.

Table 7.8 Charter programmes’ impact according to management—paper count and row percentage

	Negative		Neutral		Mixed, ambiguous or inconclusive		Positive	
	Count	%	Count	%	Count	%	Count	%
<i>Global impact</i>								
Independent	1	20.0	0	0.0	1	20.0	3	60.0
CMO	8	47.1	1	5.9	3	17.6	5	29.4
<i>Learning outcomes</i>								
Independent	0	0.0	0	0.0	0	0.0	1	100.0
CMO	1	20.0	0	0.0	1	20.0	3	60.0
<i>Equity-related dimensions</i>								
Independent	2	66.7	0	0.0	0	0.0	1	33.3
CMO	4	80.0	0	0.0	1	20.0	0	0.0

CMOs’ results, in terms of learning outcomes, are more frequently reported to be positive than negative. This might be explained by the economies of scale and the support structures that these chains generate for their school members. However, in terms of equity, CMOs’ effects are more negative than those generated by more independent providers. This might be the result of the fact that independent schools tend to be more mission-oriented and more socially motivated than CMOs, which

makes the former more likely to generate more positive equity outcomes (Burch and Bulkley, 2011; Hernández, 2016; Roch and Sai, 2015).⁴

Student selection

The restriction of selection practices contributes to charter schools producing better results from the perspective of learning outcomes and—especially—educational equity (Table 7.9). As we saw in respect of vouchers, a regulatory framework that tolerates student selection is conducive to schools discriminating against certain types of students as a way to reduce costs and improve their overall institutional performance. These practices might benefit some schools, but can potentially harm the quality and equity of the educational system for at least two reasons. First, student selection might incentivize schools to compete on the basis of intake exclusiveness rather than on the basis of improving their performance or instructional strategy (Lubienski 2006). Second, student selection dynamics generally translate into greater school and social segregation, which results in a decrease in equity.

However, student selection is a subtle phenomenon that might happen in school settings that are not apparently conducive to this practice, or even in contexts where selective admissions are explicitly prohibited. Hidden selection practices by charter schools include requiring very high levels of parental commitment, implementing complicated applications procedures that only certain families can navigate, discouraging certain families from applying to the school during interviews, or operating exclusively in relatively well-accommodated neighbourhoods (Jabbar, 2016; Jennings, 2010; Robertson, 2015; Weiler and Vogel, 2015). Presumably as a consequence of these practices, existing research reports negative results of charter schools in terms of inclusion or equity much more often than positive, neutral and mixed results.

Subsidies

Conducting a similar analysis for subsidy programmes is more challenging, given the limited availability of studies focusing on the effects of these programmes, as well as the fact that subsidy arrangements consti-

⁴ That said, CMO size might be an endogenous variable to the profit motive, since large CMOs tend to operate with for-profit objectives more often than independent schools and, in recent years, numerous CMOs have continued scaling up their activity driven by profit.

Table 7.9 Charter programmes' impact according to student selection restrictions—paper count and row percentage

	Negative		Neutral		Mixed, ambiguous or inconclusive		Positive	
	Count	%	Count	%	Count	%	Count	%
<i>Global impact</i>								
Not allowed	29	39.2	10	13.5	18	24.3	17	23.0
Allowed	6	54.5	3	27.3	0	0.0	2	18.2
<i>Learning outcomes</i>								
Not allowed	7	23.3	2	6.7	10	33.3	11	36.7
Allowed	0	0.0	2	66.7	0	0.0	1	33.3
<i>Equity-related dimensions</i>								
Not allowed	24	80.0	2	6.7	1	3.3	3	10.0
Allowed	4	57.1	3	42.9	0	0.0	0	0.0

tute a particularly heterogeneous policy category and frequently rely on a rather undefined structure of incentives.

Allowing or prohibiting tuition add-ons

In subsidy programmes, add-on tuition fees might be allowed to ensure schools enjoy the necessary financial autonomy to experiment with innovative projects, or are equipped with the appropriate material conditions to increase the quality of their services. However, add-ons are frequently regarded as problematic in terms of equity, in that they are likely to trigger a *de facto* selection mechanism (OECD, 2012).

Results from a disaggregated analysis by impact dimension are in line with these premises. As shown in Table 7.10, when it comes to learning outcomes, allowing schools to charge tuition fees appears to be a relatively effective option. Here, studies showing positive effects are equalled by those identifying mixed results but outnumber those showing negative and neutral effects. Nonetheless, the opposite is true in relation to equity, since programmes allowing tuition add-ons show mixed and neutral effects at best and—in the great majority of cases—produce negative effects. The interpretation of such patterns, however, remains particularly challenging given the limited evidence on programmes discouraging tuition. In any case, the clear prevalence of studies finding

negative effects suggests that the equity damage caused by the imposition of school fees is particularly difficult to alleviate through the introduction of compensatory measures, such as sliding scales. While progressive scales can ensure a certain degree of resource equality, they cannot prevent or neutralize the segregation dynamics engendered by price-discriminating schools.

Table 7.10 Subsidy programmes' impact according to add-on restrictions—paper count and row percentage

	Negative		Neutral		Mixed, ambiguous or inconclusive		Positive	
	Count	%	Count	%	Count	%	Count	%
<i>Global impact</i>								
Not allowed	2	50.0	2	50.0	0	0.0	0	0.0
Allowed	5	45.5	1	9.1	2	18.2	3	27.3
<i>Learning outcomes</i>								
Not allowed	0	0.0	2	100.0	0	0.0	0	0.0
Allowed	1	16.7	1	16.7	2	33.3	2	33.3
<i>Equity-related dimensions</i>								
Not allowed	1	100.0	0	0.0	0	0.0	0	0.0
Allowed	5	71.4	1	14.3	1	14.3	0	0.0

Allowing or prohibiting selective admissions

Similar dynamics to those just described might be at play with the regulation of student admission procedures. In terms of aggregate effects, as shown by Table 7.11, research on systems allowing for student selection reports a relatively balanced combination of effects—although evaluations finding negative effects outnumber studies finding a positive impact. Studies on subsidy programmes that restrict student selection report only negative or neutral effects.

In terms of learning outcomes, the fact that positive effects on learning are only found in systems allowing student selection (Table 7.11) suggests that gains in achievement might be the result of changes in student composition and are not necessarily the result of an improvement in

Table 7.11 Subsidy programmes’ impact according to student selection restrictions—paper count and row percentage

	Negative		Neutral		Mixed, ambiguous or inconclusive		Positive	
	Count	%	Count	%	Count	%	Count	%
<i>Global impact</i>								
Not allowed	2	50.0	2	50.0	0	0.0	0	0.0
Allowed	5	50.0	1	10.0	1	10.0	3	30.0
<i>Learning outcomes</i>								
Not allowed	0	0.0	2	100.0	0	0.0	0	0.0
Allowed	1	20.0	1	20.0	1	20.0	2	40.0
<i>Equity-related dimensions</i>								
Not allowed	1	100.0	0	0.0	0	0.0	0	0.0
Allowed	5	71.4	1	14.3	1	14.3	0	0.0

school effectiveness or the instructional or organizational advantage of the private sector. Table 7.11 also shows the overly negative effect of subsidy programmes allowing for selective schools in terms of equity. None of the studies reviewed report positive effects, and the number of studies finding negative effects is greater than the number of studies finding neutral or mixed effects. Again, such results are indicative of the sorting dynamics and practices usually triggered by different modalities of PPPs in education. When given the opportunity, schools are likely to exclude socially disadvantaged or less academically able students as a means of increasing the average achievement and/or the ‘attractiveness’ of the student body and hence enhancing their institutional reputation.

For-profit schools: allowed vs. not allowed

Finally, provisions regarding the participation of for-profit schools also shape the effects of subsidy programmes. As shown by Table 7.12, only subsidy programmes allowing for-profit schools to receive public funds are reported to yield positive effects in aggregate terms, while negative effects are over-represented when contrasted with programmes not accepting for-profit schools. Conversely, most of the studies on systems prohibiting government-supported schools to operate for profit

find neutral or inconclusive effects. The over-representation of negative effects in programmes accepting for-profit schools is explained by the generally negative impact of these programmes on equity. As captured by Table 7.12, this modality of subsidy programme is likely to yield negative results for this specific impact dimension. At the same time, however, it should be noted that positive effects on student achievement are only identified for subsidy programmes accepting for-profit providers.

Table 7.12 Subsidy programmes' impact according to profit restrictions—paper count and row percentage

	Negative		Neutral		Mixed, ambiguous or inconclusive		Positive	
	Count	%	Count	%	Count	%	Count	%
<i>Global impact</i>								
Not-for-profit	1	25.0	2	50.0	1	25.0	0	0.0
For-profit	6	60.0	1	10.0	0	0.0	3	30.0
<i>Learning outcomes</i>								
Not-for-profit	0	0.0	2	66.7	1	33.3	0	0.0
For-profit	1	25.0	1	25.0	0	0.0	2	50.0
<i>Equity-related dimensions</i>								
Not-for-profit	1	50.0	0	0.0	1	50.0	0	0.0
For-profit	5	83.3	1	16.7	0	0.0	0	0.0

It is unclear which are the mechanisms that explain these contradictory effects. The association between the presence of subsidized for-profit schools and improved levels of academic achievement remains particularly difficult to interpret, especially given that the potential of commercial providers is expected to result from school competition dynamics—something most subsidy programmes do not promote explicitly, but might activate nonetheless (Moschetti, 2018).

DISCUSSION

The main goal of this chapter is to map existing research on PPPs' effects on education and to identify different patterns of effects according to

policy-design variables. In this section, we discuss our results by focusing on the two impact dimensions we have explored—namely, equity and learning outcomes.

Equity Effects of PPPs: Conducive to School Segmentation and Segregation

Different PPP modalities appear to yield similar results regarding equity-related dimensions and—especially—school segregation. The majority of research on PPPs, no matter their modality, reports negative effects on equity matters. This is, to a great extent, because most PPP policy programmes in education tend to replicate long-established privatization, pro-competition and quasi-market interventions, which have proven especially problematic in relation to equity and inclusion in education (Waslander et al., 2010; Languille, 2016; Verger et al., 2019; World Bank, 2018). Nonetheless, not all the policy-design variables bear the same responsibility in the production of these results.

Allowing for-profit providers to participate in PPP schemes is one of the policy choices that tends to further aggravate inequalities. Research shows that, overall, PPP interventions that limit participation to non-profit providers appear to deliver better results than partnerships that permit profit-making. The very nature of the internal incentives of profit-making institutions—and arguably their commercial ethos (Linder & Rosenau, 2000)—tends to increase the probability of these schools engaging in student selection practices guided by cost-efficiency criteria: students' characteristics (such as attitudes towards learning or academic skills), then, become a key factor in these schools' profit-maximizing function, providing incentives for them to deploy selective strategies (Elacqua, 2012; Robertson, 2010).

Tuition add-ons are another variable that appears to be significantly problematic from the equity perspective across different PPP modalities. This is due to the fact that, when subsidized schools can top up public funds with parental contributions, equity suffers as a consequence of add-ons generating typical market price-based hierarchies and sorting dynamics that lead to socioeconomic stratification. This stratification is particularly difficult to alleviate, even with compensatory measures or maximum-price regulations (Narodowski, 2002; Krüger, 2014).

Student selection is a third cross-cutting phenomenon affecting all PPP models, with negative implications for equity in education. The pervasiveness of student selection practices is a result of schools' perfor-

mance being primarily determined by the nature of their student intake (Van Zanten, 2009). When student selection takes place, research tends to show positive results on learning outcomes for selective schools in comparison to non-selective schools, but also negative effects on equity and inclusion (Hsieh & Urquiola, 2006). Nonetheless, numerous studies report that, even when student selection is not allowed, covert selective practices happen in the context of voucher schemes (Carrasco et al., 2017; Zancajo, 2018), charter schools programmes (Jennings, 2010; West et al., 2006) and public subsidies programmes (Gottau & Moschetti, 2016; Rambla, 2003). Thus, research based on formal regulations does not capture the dimension of the selection effect because it tends to be administratively difficult for governments to control whether the private schools involved in PPP frameworks fully comply with public regulations on students' admissions.

PPPs' Effect on Learning Outcomes: Not a Win-Win for All

According to the reviewed literature, the different modalities of PPPs yield mostly positive results in relation to learning outcomes, usually measured in terms of student performance on standardized tests. The causal theory connecting PPPs and improved student achievement relies, on the one hand, on the school effectiveness dynamics that increased choice and competition trigger; on the other, on the fact that private school providers are more autonomous and are, accordingly, more likely to innovate and promote more socially relevant education (Chubb & Moe, 1990). Notwithstanding, empirical research shows that pedagogic innovation is not necessarily the main driver of PPP effectiveness. PPP schools, instead, tend to strengthen their effectiveness by adopting organizational strategies, such as introducing longer school days, as well as instructional practices more oriented toward discipline, ability grouping and external tests preparation (Lubienski, 2003; Termes et al., 2017; Preston et al., 2012). These types of strategies have proven to be particularly effective in schools serving vulnerable populations (Angrist et al., 2013).

In PPP frameworks, the improvement of learning outcomes is also connected to the changing student intake in more competitive schools. Numerous studies show that schools react to market pressures by adjusting their relationship to the environment, and that those schools that are better positioned in the educational market are able to exert a degree of control over student composition (Waslander et al., 2010; Van Zanten,

2009; Lacireno-Paquet et al., 2002). Other authors note that, in a context of choice and diversity, self-selection dynamics are likely to be at play (see Chen and Pereyra, 2019). Accordingly, the diverging schooling preferences and expectations of families, given their socially constructed nature, affect substantially the social composition of private, charter or subsidized schools (Solmon & Goldschmidt, 2004). Therefore, beyond instructional and organizational strategies, the explanation for the connection between PPPs and improved levels of educational achievement would also lie in the specific student composition of certain schools.

Our review seems to support this line of reasoning, in that PPP arrangements allowing for student selection practices and tuition add-ons yield slightly more positive results in terms of learning outcomes. As we have seen, those PPP designs that are more frequently found to produce substantive achievement gains are precisely those that provide schools with more leeway for adjusting their student intake—whether through explicitly selective admissions or by charging tuition fees. However, to confirm this hypothesis, it would be necessary to unpack our *learning outcomes* category in order to understand at which levels such performance gains occur.⁵ This is so as, if the improvement in learning outcomes is the result of changes in the student composition, performance gains are unlikely to be found at the system level. In more segregated educational systems, peer-effect losses undermine the overall effectiveness of the educational system, something that especially penalizes disadvantaged students (Levin, 2002). The differential effects of universal and targeted vouchers would corroborate the pertinence of this line of reasoning. Thus, the superiority of targeted over universal vouchers might be explained by the fact that the former enables disadvantaged students to benefit from being schooled alongside their better-off peers. In contrast, when universal voucher systems allow the free circulation of any pupil within the system, ensuing segregation dynamics are likely to inhibit positive peer effects, so that the aggregate level of educational achievement is more likely to stagnate, or worsen, as a consequence of enhanced stratification.

⁵ The fact that our analysis merges system-level, school-level and student-level gains in learning achievement into a single category does not allow us to perform a more fine-grained analysis.

CONCLUSIONS

This chapter highlights the importance of policy-design variables when making sense of the diverging impact of PPPs in education. Specifically, the chapter shows that policy decisions on profit-making, add-ons and student selection can potentially work as either catalysts or inhibitors of market dynamics in education and—in so doing—play a significant role in mediating the performance and outcomes of PPP programmes. These dynamics are especially visible in relation to equity issues. Our results demonstrate that those PPP designs more inclined toward the promotion of market competition between providers, or which encourage market interactions between schools and families (via add-ons or school choice), are also those that pose greater risk to educational equity. When market dynamics are encouraged within PPP frameworks, schools tend to address competitive pressures by investing more resources into student screening and selection, whereas the effects on educational innovation and instructional improvement are barely documented. This is consistent with existing studies pointing to the fact that PPP schools generate more innovations at the organizational level than at the pedagogic and/or instructional levels (Lubienski, 2003; Lake, 2008).

Our results suggest that, if the aim of educational policy is to promote inclusion and equity, the implementation of most of the PPP programmes analysed in this chapter would not be advisable. Even if educational quality is the goal, most PPP programmes, by undermining equity, do a disservice to the aggregated effectiveness of the educational system. Teacher training and professional development, school cooperation networks or distributed leadership are all policy programmes that contain greater potential for school improvement—and are less challenging from the public accountability perspective—than partnering with the private sector.

Besides these general trends, however, our review does not allow for the identification of robust causality patterns for most of our variables of interest. In summary, such results suggest that existing knowledge about the effects of the different PPP policies is still limited. This is not so much the consequence of insufficient evidence, but rather of the fact that the effect of particular policy-design variables is rarely analysed in isolation and therefore evidence on specific policy arrangements remains fragmentary and unsystematized. Our research has identified a number of research gaps for which further research is warranted. Within the reviewed PPP

modalities, public subsidies to the private sector is the modality most clearly under-researched. Studies exploring PPPs' impact in dimensions other than learning outcomes and equity (including pedagogic innovation, educational differentiation and economic efficiency) are equally insufficient. In terms of policy-design variables, future research could focus on the role of accountability systems, school admission procedures and school choice regulations in mediating PPP outcomes. In territorial terms, more research on PPPs should be conducted in the so-called Global South, where studies on this phenomenon are emerging, but are still marginal.

It should finally be noted that policy design is not the only factor of significance in understanding PPP effects. Beyond policy-design factors, the divergent and inconclusive result of research on PPPs is the consequence of different institutional and socioeconomic contexts where research is conducted, and can also be attributed to the adoption of varying methodological approaches. As discussed by Jabbar et al. (2019) in relation to school choice policies, the effect of these policies depends greatly on the context of implementation and the socioeconomic status of the population benefitting from such policies. PPP reforms are complex and multifaceted: their outcomes are conditioned by how these reforms interact with other educational policies in place, local realities, administrative capacities and the political reception of these reforms. Thus, to strengthen its explanatory power, future research should attempt to identify the context-mechanism configurations (cf. Pawson, 2006) that influence different patterns of PPP outcomes.

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