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The politics of legitimacy: roles of for-profit corporate and private philanthropic actors in global education

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ABSTRACT

High-net-worth individuals, and the business organizations they found and lead, are becoming a class of 'elite' donors who use philanthropic vehicles and mechanisms often drawn from business to achieve their philanthropic goals. With the entry of this class of donors into the realm of global education, the authors argue that we are witnessing the commodification of legitimacy. Utilizing comparative methodology, they examine case studies from Brazil, China, India, and the United States to systematically analyze global trends and regional differences in contemporary for-profit corporate and private philanthropic enactment. The analysis reveals consistent themes, with regard to philanthropic trends, as well as contemporary philanthropic enactment patterns that show the capitalist economy to be a driving force of globalization and transformation in global education. The discussion reflects on how new roles simultaneously support and undermine global education goals, highlighting these trade-offs as they relate to legitimacy, transparency, and accountability. This contribution brings the attendant vulnerabilities and trade-offs of non-state actor engagement to the forefront of discourse around the achievement of Sustainable Development Goal 4 and considers safeguards that can be taken to ensure equitable and democratic education governance.

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1. Introduction

High-net-worth individuals (HNWIs), and the business organizations they found and lead, are becoming a class of 'elite' donors who use philanthropic vehicles and mechanisms, often drawn from business, to achieve their philanthropic goals. Such trends have been observed in both in-house for-profit philanthropic divisions of existing corporations, such as Google.org, and for-profit philanthropic limited liability companies (LLCs), such as the Omidyar Network and Chan Zuckerberg Initiative (Brakman Reiser 2018; Brakman Reiser and Dean 2023). These new philanthropic approaches hold the potential to disrupt traditional structures and change education, bring new

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players into the education policy sector, reshape existing policy networks, and shift dynamics of global education governance (Avelar and Patil 2020; Ball 2012, 2020b).

The phenomena under exploration is ‘for-profit philanthropy,’ a term that encompasses emerging trends among for-profit corporate and private philanthropic organizations to incorporate business logic into their operations, blurring the lines between profit and social mission (Brakman Reiser and Dean 2023). Pioneered in Silicon Valley, for-profit philanthropic models apply practices and standards originally conceived for the commercial world to the social sector (Brakman Reiser 2009, 2018; Schervish, O’Herlihy, and Havens 2001). ‘Virtuous capitalism’ (Letts, Ryan, and Grossman 1997), ‘philanthrocapitalism’ (Bishop and Green 2008), ‘shared value’ (Porter and Kramer 2011) and ‘strategic philanthropy’ (Arrillaga-Andreessen 2012, 2015; Brest 2016; Brest and Harvey 2008) are other terms that describe similar phenomena: for-profit approaches characterized by a dual set of social and business objectives.

With the entry of this class of elite donors into the realm of global education, the authors argue that we are witnessing the ‘commodification of legitimacy,’ their terminology to describe dual pursuits of capitalist models and social objectives that underpin private sector engagement in the business and governance of international development (Patil 2021; Gorur 2020, Klees 2020). For-profit corporate and private philanthropic organizations seek legitimacy in the education and government sectors to further the business agendas of their corporate affiliates: advancing market development, workforce development, their license to operate, and brand recognition (Patil 2023).

‘Legitimacy,’ here, refers to favorable judgement about the acceptability of an object/person and its right to govern (Deephouse and Suchman 2008). Objects and people that/who are legitimized are typically less questioned and, consequently, tend to have greater ability to influence behavior (Suddaby, Bitektine, and Haack 2017). Legitimized objects and people also instill institutional confidence, reduce uncertainty, and foster favorable stakeholder commitments. Stakeholders tend to respond positively to narratives that highlight ventures as an opportunity to help others (Diez-Martin, Blanco-Gonzalez, and Cachon-Rodriguez 2022; Reay and Hinings 2009; Sendra-Pons, Comeig, and Mas-Tur 2022). Here, the objects of focus are for-profit corporate and private philanthropic organizations.

For-profit corporate and private philanthropic organizations often seek legitimacy through strategies of multistakeholderism. ‘Multistakeholderism’ is defined as ‘a governance model in which multiple stakeholders – such as governments, businesses, civil society organisations (CSOs), and individuals – are involved in decision-making processes related to a particular issue or policy’ (da Silva, Croso, and Magalhaes 2023). Public-private partnerships and multistakeholder partnerships for education have become well-established areas of research within the field of international and comparative education (see Draxler 2008; Draxler et al. 2012; Education International 2009; Ginsburg et al. 2012; LaRocque 2008; Patrinos, Barrera-Osorio, and Guaqueta 2009; Robertson 2008). Recent scholarship in this area highlights shifts in power dynamics and education governance as a result of emerging non-state actors in the education sector (Ball 2012, 2020b; Draxler 2008; Menashy 2016, 2019; Menashy and Shields 2017, Robertson et al. 2013; Tompkins-Stange 2016). To build upon this literature, the authors assert that it is imperative to analyze the ways in which for-profit philanthropic approaches are being enacted in various country contexts and the trade-offs that can

arise from the roles of for-profit corporate and private philanthropies in global education and the blurring of lines between public and private spheres.

The authors argue that for-profit philanthropy is an understudied phenomenon that is rapidly encroaching on traditional forms of high-profile philanthropy, in numerous and varied contexts around the world. Utilizing comparative, multi-sited ethnographic methods, this paper examines case studies from Brazil, China, India, and the U.S. to systematically analyze global trends and regional differences in contemporary strategies of for-profit philanthropic enactment in education. Analyses of each focal country cover traditional philanthropic engagement and the applicable legal and regulatory frameworks, as well as distinct/unique pathways to new philanthropic approach enactment in each country context:

- In Brazil, policy advocacy to advance philanthropic agendas.
- In China, coordinated corporate philanthropy and in-kind efforts.
- In India, innovative financing mechanisms.
- In the U.S., alternative organizational structures for philanthropy.

The authors' comparative analysis suggests that along with cultural alignment and regulatory support, private wealth generation is an important precursor to the development of a strong philanthropic sector (Patil and Brakman Reiser 2021). Businesses, particularly sizable ones, along with their founders and leaders, play a large and increasing role as philanthropic sectors emerge and grow. Philanthropic and other private sector engagement practices in the social sphere are evolving on the ground with innovative structures and mechanisms taking shape, often drawn from business. Thus, a key finding is an increasing shift toward the capitalist economy as a driving force of globalization and transformations in global education.

This shift, discussed further in sections four and five, has implications for systems of education. Similar to capitalistic business models, for-profit approaches to education solutions and services must be market conscious and knowledge based to succeed (Patil and Brakman Reiser 2025). Business strategies often utilize economies of scale and standardization to maximize profits. Corporate social responsibility strategies increasingly include non-financial resources such as products, employee time and know-how that are often directly connected to core business development objectives. The implication for education systems lies in that the incentives to guide education solutions will be increasingly conceptualized through the lens of unique corporate products, programs, platforms and policies. As such, even when involved with a common good like education, their primary interests are often diametrically opposed to reflecting humanity's diverse ways of knowing and being in various local contexts (Patil 2024).

To illustrate, the shift in philanthropic practices resulted in varying implications to the systems of education the across the four countries we analyzed (Patil and Brakman Reiser 2025).

The Lemann Foundation's involvement in coordinating the construction of National Learning Standards in Brazil is an illustration of the outsized impact of elite family philanthropy on the education sector through policy influence (Avelar and Ball 2019; Tarlau and Moeller 2020). Scholars describe how 'rather than provide grants to smaller NGOs or civil society groups, the Lemann Foundation strategically invested its resources

to make the most large-scale policy impact possible' (Tarlau and Moeller 2020, 8). This process was termed 'philanthropizing consent' which represents 'ways in which private and corporate actors negotiate political openings and alliances that enable new assertions of power and influence' (Tarlau and Moeller 2020, 4).

The charitable activities of the Tencent Corporation and of Charles Chen Yidan, the co-founder of Tencent who is most identified with its charitable giving, exemplifies the deployment of innovative philanthropic approaches through the use of coordinated high net-worth individuals and corporate philanthropy as well as significant in-kind efforts to increase charitable giving, to influence education policies and priorities. For example, like many Chinese philanthropists, Chen views higher education as the key to personal and national economic development (Kuo et al. 2017).

Tata Trusts' impetus for innovative financing in India is shifting the strategy/practice in the country to support the achievement of the SDGs via through pay-for-success mechanisms (Mehendale and Singh 2020). These mechanisms of innovative financing for education can involve 'a reform of the state according to market practices, such as a focus on measurable outcomes and a combination of financial and social returns, offering the possibility of private actors profiting from underfunded social and educational initiatives' (Avelar, Terway, and Dreux Frotte 2020).

The utilization of the philanthropic limited liability company (LLC) by the Chan Zuckerberg Initiative (CZI) in the US illustrates of how creative for-profit philanthropic business models, at the intersection of corporate and philanthropic agendas, impact education by wielding influence over EdTech products and platforms. In circular fashion, these platforms that are supported by philanthropic investments via the LLC vehicle can, in turn, have return on investment benefits for the founder's firms' business objectives (Patil and Brakman Reiser 2025). The result is a shifting dynamic between technology industry business incentives and philanthropic giving that is re-centering toward technosolutionist worldviews and goals for education.

The increasing shift toward the capitalist economy as a driving force of globalization and transformations in global education risks enmeshing systems of public education with corporate and philanthropic initiatives that draw upon their economic incentives and global networks to scale their unique worldview for education solutions. These corporate strategic efforts often align with industry priorities and preferences, and do not necessarily map onto the public priorities and needs identified under Sustainable Development Goal 4 (Patil and Brakman Reiser 2021). How these models are influencing the development and dissemination of education products is under-researched given the outsized impact of private corporate and philanthropic actors.

Our contribution is timely and relevant to global education, as private resources and private involvement are framed as essential to the achievement of internationally agreed upon development goals (UNESCO 2015, 2021; United Nations General Assembly 2015). Through multistakeholder strategies, elite donors are already beginning to 'assume socio-moral duties that were heretofore assigned to civil society organizations, governmental entities and state agencies' (Shamir 2008). For systems of education, where the government becomes just one of many stakeholders responsible for addressing social challenges, the introduction of for-profit organizations to global education governance raises significant concerns. Addressing trade-offs and shifts in global education governance, this paper aims to contribute to the understanding of meaningful and responsible

engagement by for-profit corporate and private philanthropic organizations in the governance of global education.

This paper is organized as follows. After this introduction, the second section outlines the theoretical and methodological orientations of this research. The third section summarizes our analysis of consistent themes and country differences with respect to the contours of emerging philanthropic trends. The fourth section addresses the implications for systems of education, specifically the shifting landscape of elite donors in education governance. In the fifth section, the authors reflect on how these pathways all simultaneously support and undermine global educational goals, highlighting trade-offs of legitimacy, transparency, and accountability and considers safeguards that can be taken to ensure equitable and democratic education governance. The final section concludes the analysis with potential policy levers and rationales for meaningful long-term strategic philanthropic engagement in global education.

2. Methodology

Our theoretical and methodological frameworks are grounded in analysis of political economy and policy connected to well-established themes of policy borrowing and lending in the field of comparative and international education. A political economy lens is helpful to unpack various dynamics through which global education agendas and policies are constituted and disseminated internationally. Early scholars in the field of policy analysis advocated for ‘an applied subfield whose contents cannot be determined by disciplinary boundaries but by whatever appears appropriate to the circumstances of the time and the nature of the problem’ (Wildavsky 1979, 15). Relating policy analysis to the field of international and comparative education, Waldow and Steiner-Khamsi (2019) emphasize a comparative method of inquiry as indispensable for examining policy transfer processes across and beyond national boundaries. For this reason, some scholars use the terms ‘policy-borrowing research’ and ‘comparative policy studies’ interchangeably. The present analysis is grounded in this perspective.

Efforts to theorize globalization and education policy change are well established in the field of comparative education (Verger, Fontdevila, and Zancajo 2016). The Globally Structured Education Agenda, for example, identifies the capitalist economy as the driving force behind globalization and transformations in global education. World Culture Theory argues that policy reforms spread as part of the diffusion of a culturally embedded model of the modern nation state. This encompasses a range of common education policies adopted globally as part of the international dissemination of Western values of modernity and legitimation pressures on non-Western governments. Adding and centering nuance, though, scholars of anthropology, sociology, and historical institutionalism often contest these notions of policy convergence on the basis of locally-grounded research that considers global policy ideas as constantly and actively reinterpreted, modified, instrumentalized, and/or resisted by local agents’ their own symbolic frames, interests, and institutional constraints.

This paper aims to build on this body of literature from an historical institutionalist perspective, examining the mediating role of institutional traditions and national regulatory frameworks with respect to for-profit philanthropic strategies and the adaptation of global education models. Four country case studies, developed

by the authors in collaboration with local researchers, provide the foundation for this analysis. Brazil, China, and India – the largest developing economies and leading contributors to philanthropic flows (OECD 2018) – along with the U.S., were selected for this initial analysis due to their dominant sizes and potential to develop universal solutions or programs that can be implemented or transferred globally.

Case study methodologies are widely used across multiple disciplines and fields, often with relatively little consideration for the embedded terms and methods utilized by researchers (Ragin and Becker 1992). Bartlett and Vavrus (2016) argue that ‘existing, influential conceptualisations of case studies can be usefully divided into three categories: variance-oriented, interpretivist, and process-oriented’ (28). The first two categories, those scholars argue, are problematically constrained and narrow in their conception of culture, context, and comparison. Variance-oriented case studies emphasize bounding the case and have limited conceptions of cultural and contextual influences, and interpretivist approaches underemphasize power relations and/or social structures. Alternatively, Bartlett and Vavrus propose an innovative, process-oriented case study approach that aims to compare, contrast, and ‘trace across’ sites or scales. Their ‘comparative case studies’ approach re-envisions culture, context, and comparison in case study research, which resonates with the comparative, multi-sited, ethnographic case study approach utilized in the present study.

The *Guide to Monitoring eLearning Programs* (Intel Corporation and SRI 2012), a research design originating from ethnographers at Intel Research Labs, aided the data collection process. Each case study shares a common methodological framework and analytic strategy to facilitate analysis of historical, social, economic, political, and regulatory forces that shape contemporary philanthropic and other private sector engagement in education sectors around the world. Analyses of each focal country cover traditional philanthropic engagement and the applicable legal and regulatory frameworks, as well as distinct/unique pathways to new philanthropic approach enactment in each country context. The common framework allows for comparison across the case studies and enables a systematic analysis of global trends, as well as regional differences (see Patil and Brakman Reiser 2021 for further details).

This initial synthesis just touches the surface of complex historical, cultural, and regulatory implications affecting the evolution of new philanthropic trends and innovative mechanisms in each focal country context. Longer studies, in collaboration with regional experts, can provide more thorough assessments and historical institutional analyses tracing the evolution of country engagement, illuminating the historical and regulatory contexts that shape present practices, and highlighting ‘what’ and ‘why’ variations in contemporary philanthropic enactment across different country contexts. Through analyzing the emerging roles and risks of philanthropic enactment in global education across Brazil, China, India, and the U.S., though, this paper aims to contribute to the literature:

- Nuanced understandings of global trends and country differences across four country contexts, including how various country pathways to contemporary philanthropic enactment point to the commodification of legitimacy.

- Reflections on the trade-offs between opportunity and risk for education development due to the new roles of philanthropy in relation to Sustainable Development Goal 4,¹ particularly with respect to legitimacy, transparency, and accountability.
- Potential policy levers and rationales for meaningful and positive long-term strategic engagement of for-profit corporate and private philanthropic engagement in the education sector.

3. Analysis: consistent themes and country differences

The authors' analysis of country examples highlights commonalities and differences that characterize present day enactments of philanthropic agendas across the four countries. They also establish a useful super context for subsequent reflections upon the commodification of legitimacy and implications for systems of education. Due to time and space constraints, this initial synthesis just touches the surface of complex historical, cultural and regulatory implications affecting the present evolution of new philanthropic trends and innovative mechanisms in each country context.

***Theme 1.** Along with cultural alignment and regulatory support, private wealth generation is an important precursor to the development of a strong philanthropic sector. Businesses, particularly sizable ones, along with their founders and leaders, play a large and increasing role as philanthropic sectors emerge and grow.*

The large-scale and sustained investment required to pursue social change through philanthropic and other private sector engagement in the social sphere requires considerable resources, as well as cultural and regulatory support. Though at different points in time, the development of philanthropic and other forms of private sector engagement, and particularly recent philanthropic innovation, followed a similar path in each of the countries studied. Philanthropic enterprise was supported by cultural norms and its evolution was underpinned by the amassing of private wealth through businesses, particularly among company founders and their families.

In Brazil, voluntary associations and giving have colonial roots reaching back to the arrival of Europeans in 1500. Two key pillars exhibited early influence on the development of the non-profit sector: the plantation system and the close ties between the colonial government and the Roman Catholic Church (Landim 1993). From the arrival of European settlers until the issuance of the Proclamation of the Republic in 1889, the combined influence of the plantation system and the Catholic Church negated any impetus for further development of civil society and the non-profit sector. Scholars thus argue that the development of the social sector in Brazil must be viewed within the larger historical context of a strong state and a weak civil society (Anheier and Salamon 1998; Landim 1993). Independence, separation between church and state, and economic modernization following independence from a period of military rule were important factors in the evolution of philanthropic enactment. Brazil's independence from Portugal in 1822 led to voluntary associations gaining considerable prominence, with the profiles of these associations also shifting from religious or local entities to those organized around political or professional interests. The end of military rule marked a trend toward privatisations in the philanthropic sphere, as Brazilian business leaders were influenced by new

ideas at home and abroad about corporations engaging in the communities in which they operate (Aguero 2003; Landim 1993; Martins and Krawczyk 2016; Spero 2014).

The fiscal and legal environment for philanthropy in Brazil has not kept pace with business sector and civil society changes over the last few decades, impeding the domestic development of private social investment (Lessa and Rossetti 2005). Enactments in 1999 and 2001 broadened access and remain fundamental today; Brazilian non-profit organizations may now legally form as foundations or associations, both are asset-locked and either created by or registered with the government (ICNL 2019; Spero 2014). Foundations, organized around an endowment and managed by a board or council, may be public or private. Associations, formed to engage in specific charitable activities, are governed by general assemblies of members and do not require the establishment of an endowment fund. This makes the association model appealing to many founders and most of Brazil's new organizations have adopted an association structure (Lessa and Rossetti 2005). Present trends in Brazil include the rise of a sophisticated corporate social responsibility sector, elite family philanthropy creating 'in-house' programs and strategies of policy advocacy, and impact investing.

China has a centuries-old history of charitable and philanthropic activity, resonant with China's political and cultural commitment to harmonious society; all three of China's primary religious traditions embrace the value of charitable giving. Traditionally, charitable giving in China 'emphasi[zed] community and clan-based giving to help the most needy' (Johnson and Saich 2018, 10), targeting individuals and families in need rather than systemic projects (Kuo et al. 2017). With the arrival of foreign missionaries, philanthropic norms did shift somewhat to include the funding of hospitals and scientific endeavours (Johnson and Saich 2018). The period from the nationalization of wealth in 1949 until market reforms began in 1978 created a notable, extended gap in philanthropic activity, and engendered considerable distrust of philanthropy across the Chinese population.

In China, four decades of phenomenal economic growth coupled with recognition of citizens' still-unmet needs for social services set the stage for philanthropic (re)engagement of government and individual donors alike. The 2016 Charity Law marked major regulatory change, reducing bureaucratic hurdles for domestic charities, reinvigorating the charitable trust form, enhancing requirements for transparency, and clarifying tax benefits for organizations and donors (Lin 2018). While this law shifted the Chinese government to a welcoming and facilitative stance on domestic philanthropy, particularly when aimed at poverty alleviation through education and other means, China's government perceives and situates foreign philanthropy as a potential influence threat that needs restriction. The 2017 Law on the Management of the Activities of Overseas NGOs in Mainland China reassigned foreign NGO registration and oversight from the Ministry of Civil Affairs, which handles domestic charity registration and oversight, to China's powerful security agency. China is now 'molding the kind of third sector it wants . . . focused on service provision, charity and capacity building' domestically, with limited influence from external actors (Sidel 2019). The rapidly growing philanthropic sector in China today is dominated by corporate giving, with the highly successful technology sector contributing funds and harnessing prime platforms to engage and encourage donors.

In India, the tradition of charity dates back 2000 years, with contributions originating from both ordinary and wealthy Indians to social causes deeply rooted in broad religious, political, ethnic, social, and cultural diversity and foundations of society (Cantegreil et al. 2013, Sen 1993). Ancient charity often went unrecognized, flowing through informal mechanisms and was not quantifiable in monetary form (Cantegreil et al. 2013), with traditional practices largely explained by the concepts of Zakat in Islam – or Daan in Hinduism, Buddhism, Jainism, and Sikhism – which confer a strong cultural sense of responsibility towards family, community, and society (Sen 1993; Shah 2020). Another feature of traditional philanthropy was motivation to set aside income or profits for charity to accumulate merit for the afterlife, build community or caste prestige, and/or strengthen one's business reputation (Cantegreil et al. 2013).

The mid-19th century marked the beginning of the modern philanthropy era in India. Under British colonial rule, charity diversified from providing religious and communal services to spearheading public projects and initiatives. Colonialists encouraged Indian elite philanthropy because it provided funds for civic programs while simultaneously socializing local elites to imperial control. Industrialization created fortunes in India, offering economic surplus for public welfare. Industrial philanthropists such as Jamsetji Tata, the Indian industrialist who founded the Tata Group conglomerate, pioneered the concept of building wealth for the public good. The independence movement, and Mahatma Gandhi's leadership of it, further emphasized the ethical aspect of economic behaviour, and how contributions to public works areas such as urban transport or sanitation also benefit business (Cantegreil et al. 2013; Sen 1993).

Regulations in India today reflect tension between encouraging philanthropy and civil society and a set of regulations that address NGO accountability and foreign meddling (Sen 1993). Section 8 of the Companies Act of 2013 imposed compulsory corporate social responsibility obligations on for-profit companies. The Income Tax Act provides incentives to charitable and philanthropic organizations and to their donors but requires all income to be spent in India, in alignment with longstanding limits on foreign charities entrenched under the Foreign Contribution Regulation Act (Kassem et al. 2016). New government regulations in India mandating corporate giving to the social sector and novel education financing mechanisms such as social impact bonds have put the country at the forefront of philanthropic experimentation.

In the U.S., charitable organizations have been a ubiquitous and important presence since the 1830s (De Tocqueville 1835). With the great expansion of individual and corporate wealth at the turn of the 20th century, business magnates like Andrew Carnegie and John D. Rockefeller became elite philanthropists and founded foundations. For roughly 100 years, makers and inheritors of vast fortunes adopted this model nationwide, shaped by a highly regulated and professionalized environment. Historically, U.S. charitable and philanthropic organizations are legally organized under state laws that regulate their internal governance and leaders' and managers' obligations. They can qualify for income tax exemption and receive tax-deductible contributions under federal law (Internal Revenue Code §§ 170(c), 501(c)(3), 2522, 2055). The U.S. philanthropic sector is also highly professionalized, with organized networks across various dimensions encompassing charitable and philanthropic organizations of every size, in countless issue areas across urban, suburban and rural geographies from coast to coast. Trade associations establish standards and best practices for members and train organizational leaders,

employees, and volunteers (National Council of Nonprofits 2021). University-based programs offer individual courses and degree programs taught by faculty who research philanthropy and non-profit organizations (Lee 2002; Mirabella and Wish 2001). These highly developed networks hold frequent conferences and events for training, collaboration, and idea sharing.

For philanthropic organizations to proliferate and a robust philanthropy sector to take hold and become a profession, a stable and supportive regulatory environment was needed. Across all four country contexts major corporations and other significant businesses play a particularly important role, in this regard, due to the scale of their financial and human resources and their political and cultural influence. Company inventory, employee skills and time, and company and founder money all contributed considerably to philanthropic efforts in all four countries. In Brazil and China, the dominance of corporate donors in the philanthropy sector is particularly striking (close to 70 percent, in both cases), but even in the U.S., where levels of direct corporate giving are much smaller, the prominence of corporate founders, leaders, and their family members in the philanthropic domain has enhanced the influence of business (Callahan 2017). Corporate philanthropy efforts serve a range of objectives: expressing gratitude and the desire to pay success forward, as part of larger voluntary (or, in India, mandatory) corporate social responsibility programs, enhancing consumer perceptions and company goodwill, staunching populist criticism, or currying favor with cash-strapped governments. Business donors and leaders in China and the U.S. have also pursued opportunities to build new philanthropic products and service offerings that leverage their existing business footprints. Across all four countries studied, the most significant business entities, their leaders, or a combination of both, are at the forefront of philanthropy, despite operating in different types of political systems at different stages of economic development.

***Theme 2.** Philanthropic and other private sector engagement practices in the social sphere are evolving on the ground with innovative structures and mechanisms taking shape, often drawn from business.*

Philanthropists and other private sector actors are experimenting with new tools to enhance the operations and outcomes of their strategic engagement, including important innovations in education. Although these tools are varied and designed to solve specific problems, they often draw inspiration from the for-profit sector. Given the influence of major businesses in society, particularly in philanthropy, it is natural for founders and leaders to try to adapt the tools of their success in the business world for use in the philanthropy sector. For instance, social impact bonds, which play a role in India and are also deployed in the U.S., rely on models drawn from finance. In China, corporate construction of new giving platforms redeploys technologies designed to generate profit to boost charitable giving. Alternative methods of organizing philanthropic activity, such as U.S. donor-advised funds and philanthropic limited liability companies (LLCs), have introduced successful business players, including investment companies, and widespread business practices into the philanthropic arena (Brakman Reiser 2018; Brakman Reiser and Dean 2023). While importing successful players, practices, and norms from

business into the philanthropic context will likely continue, the extent to which this approach will complement, crowd out, or surpass traditional approaches in efficacy is not yet known.

The case of the Lemann Foundation's involvement in coordinating the construction of National Learning Standards in Brazil is an example of the outsized impact of elite family philanthropy. Created in 2002, the Lemann Foundation emerged as a major player in Brazilian education reform and gained scholarly attention in 2015 (Avelar and Ball 2019). Scholars articulate the strategy, power and influence of the Lemann Foundation strategy,

Rather than provide grants to smaller NGOs or civil society groups, the Lemann Foundation strategically invested its resources to make the most large-scale policy impact possible ... promoting national learning standards became a means through which the foundation could embed itself within the state, wield influence, and gain prestige. (Tarlau and Moeller 2020, 8)

Ultimately, Tarlau and Moeller (2020) introduce and explore the notion of 'philanthropizing consent,' whereby philanthropic organizations in Brazil between 2015–2017, notably the Lemann Foundation, rapidly popularized – among public audiences, policy actors, and teaching professionals – the idea of a need for national learning standards.

The charitable activities of the Tencent Corporation and Charles Chen Yidan, the co-founder most identified with charitable giving, exemplify the deployment of innovative philanthropic approaches in China. Founded in Shenzhen in 1998, Tencent has grown to be valued at hundreds of trillions of dollars. Since 2007, when Tencent created Tencent Charity Foundation, becoming the first Chinese Internet company to do so (Tencent 2018), the company has contributed RMB 3.5 billion and its employees an additional RMB 68 million. Supporting a range of charitable efforts, this example illustrates the deployment of innovative philanthropic approaches through the use of coordinated high net-worth individuals and corporate philanthropy as well as significant in-kind efforts to increase charitable giving, to influence education policies and priorities. As noted in the introduction, like many Chinese philanthropists, Chen views higher education as the key to personal and national economic development (Kuo et al. 2017).

A contemporary example from India is Tata Trusts establishing an ecosystem for innovative financing through pay-for-success mechanisms, and having implementation and process mechanisms adopted as part of an investment deal with Social Finance India and the India Education Outcome Fund to support SDG achievement. With the financial support of Tata Trusts, Social Finance India was established as a non-profit organization 'to harness capital to address social challenges where outcomes are poor, where the system is acknowledged to be failing and where the costs of failure are high' (Social Finance India, India Education Outcomes Fund 2019, 29). Having observed problems with scale because custom-designed impact bonds had one service provider, one outcome payer, and one or more risk investors, Social Finance India sought to avoid inefficiencies and high one-time costs for contracting and performance management. Interested in scaling through pooled funds, with the whole flow of money managed by an overarching entity, in 2018 – with the support of Tata Trusts and the Global Steering Group for Impact Investment – Social Finance India invested US\$1 billion in the India Education Outcomes Fund (Mehendale and Singh 2020). The Fund was conceptualized as

a marketplace for innovative finance mechanisms and emerged as a direct response to key problems India confronts around financing education.

The example selected for the U.S. highlights the use of a philanthropic limited liability company as an alternative organizational structure to pursue philanthropy, in this case education philanthropy in support of SDG 4. Founded in 2015, just after the birth of the first child of Facebook founder and CEO Mark Zuckerberg and his wife, Dr Priscilla Chan, the mission of the Chan Zuckerberg Initiative (CZI) is to ‘build a more inclusive, just, and healthy future for everyone’ (CZI 2021a). Its core initiatives span education, justice and opportunity, and science. The couple committed to donating 99% of their Facebook shares to these efforts, a pledge at that time valued at US\$45 billion and worth far more today. They explain their choice to use a limited liability company structure rather than a traditional private foundation in terms of flexibility, the ability to ‘fund non-profit organizations, mak[e] private investments and participat[e] in policy debates,’ underscoring relative tax advantages (CZI 2021b; Zuckerberg 2015). CZI acts as a coordinating entity, with actual disbursements of funds donated by CZI made directly; by an associated donor-advised fund, the Chan Zuckerberg Foundation, a tax-exempt ‘social welfare organization’ permitted to engage in political advocacy work.

In summary, distinct country pathways toward new approaches to and forms of philanthropic enactment are shaped by historical, social, economic, and political forces within each country context, which, in turn, shape actors’ relationships with the state. For example:

- In Brazil, trends include the rise of a sophisticated corporate social responsibility sector, elite family philanthropies creating ‘in-house’ programs and strategies of policy advocacy, and impact investing.
- In China, a rapidly growing philanthropic sector is dominated by corporate giving, with highly successful technology sector actors contributing funds and also harnessing their own platforms to engage with and encourage donors.
- In India, new government regulations mandating corporate giving to the social sector, in conjunction with novel financing mechanisms, such as social impact bonds, have placed the country at the forefront of philanthropic experimentation.
- In the United States, elite donors are using commercially affiliated donor-advised funds and limited liability companies to organize their philanthropy, as these structures offer more flexibility and privacy than traditional, heavily regulated private foundations.

While governments and citizens alike desire private financial support from charitable contributions and philanthropy to meet social needs, many are wary of yielding power to institutions outside their control. Across the countries studied, governments and citizens have welcomed the contributions of private philanthropy to improve social and economic conditions but also expressed concern and sometimes suspicion around these private actors’ public discourse and decision-making influence. Government distress over the activities of foreign charities is particularly acute in China and India, where restrictive regulations limit their influence. Brazil is characterized by political divide

between big philanthropy and grassroots organizations due to contrasting worldviews, political purposes, and practical approaches. Critiques of the power of elite philanthropy in the U.S. are more diffuse but often connected to educational philanthropy, including recent challenges to universities (Brakman Reiser and Dean 2023).

4. The shifting landscape of global education governance

In the education sector, non-state actors play an increasing role in education global governance. The emerging mechanisms complement traditional philanthropic practices with implications for global and local educational contexts.

High-net-worth individuals, and the business organizations they found and lead, are becoming a class of 'elite' donors who use philanthropic vehicles and mechanisms often drawn from business to achieve their philanthropic goals.

Scholars have analysed elite donors as new policy actors who operate largely under the rationale of efficient, free-market alternatives to traditional public policymakers, demonstrating how these actors exert control over education policy (Avelar 2018; Smolarek and Scrivener 2021; Tompkins-Stange 2016) as emerging players in the political economy of global education reform (Moschetti et al. 2020; Santori 2018; Verger 2012; Verger, Fontdevila, and Zancajo 2016). This growing body of scholarship reveals shifting power dynamics and a systematic weakening of the public sector, democratic processes, and the voice of civil society (Avelar 2018; Draxler 2020; Menashy 2016, 2019; Menashy and Shields 2017; Tarlau and Moeller 2020).

Simultaneous with these changes, the role of philanthropy in society is shifting and its relationship with governments and multilateral organizations is being altered. The mechanisms of global governance that emerged in the aftermath of World War II were conceived with governments as principal actors. The conduct of international affairs was established by culture and international law, as a matter for sovereign nations and their representatives. While the politics of this established system has long been influenced by elites, the work of global governance was designed to be undertaken by authorized public bodies, through open and accountable processes, guided by democratic norms. Over the past few decades, though, the private sector, through business and philanthropic activity, has introduced new forms of governance and modalities at the state level (Ball 2012, 2018, 2020a, 2020b; Ball and Junemann 2012; Ball, Junemann, and Santori 2017). Within this context, private sector businesses, billionaires, high-tech disrupters, and social entrepreneurs are expanding the range of actors beyond the small number of large foreign aid agencies who previously dominated the landscape (Kumar 2019). As a result, the centrality of governments in conceiving, delivering, and regulating education based on agreed-upon norms and principles has weakened under pressures of demand and supply (Draxler 2020).

Present day international debates on the role of non-state actors in the politics of global education governance (UNESCO 2021) are set against the backdrop of broader shifts towards private sector engagement in the business of international development (Gorur 2020). In 2019, the United Nations dramatically, yet quietly, signed a memorandum of understanding with the corporate-led World Economic Forum (Gorur 2020; Klees 2020; Patil 2021), outlining unprecedented levels of cooperation and coordination in the fields of education, women, financing, climate change, and

health (Gleckman 2019a). Through the establishment of ‘multistakeholder governance groups’ composed mainly of multinational corporations, critics argue that the United Nations is quietly transforming into a public-private partnership with the role of the private sector playing an integral part in its governance structure (Gleckman 2019b).

Systems of education associated with the privatization of public goods and policy-making processes, where the government becomes just one among a set of stakeholders responsible for addressing social challenges, raise significant concerns. For example, private sector actors from the technology industry are amassing and interpreting data in significant quantities across national boundaries. To sustain their corporate business models, these data-driven enterprises rely on the transfer of information to readable electronic formats, producing large amounts of quantifiable data that can be tracked, monitored, and analysed (Patil 2023; Steiner-Khamsi 2016, 2020). This scenario places systems of public education within the reach of technology corporations and philanthropic elites who control the knowledge, means, and global networks to scale their technological solutions. This trend also involves a shift toward standardization, testing, and internationalization, as corporations seek to maximize economies of scale (Steiner-Khamsi 2016; Steiner-Khamsi and Draxler 2018). These practices are at odds with the ethos of education as a public endeavor that should reflect local context and unique ways of knowing (Patil 2024).

5. Reflections: addressing roles, risks, and trade-offs

Non-state actors and the emerging methods that they employ are gaining traction in education sectors and countries around the world. While their distinct donor and institutional agendas can enhance scale and innovation, they can also limit transparency and undermine accountability as it relates to both actions and outcomes.

Relationships between the non-profit sector and state are changing due to shifts in the nature and objectives of philanthropic giving, as well as the status of philanthropic organizations, in different ways, in different parts of the world. New relational dynamics reflect and amplify changes in – and power mechanisms behind – national and international public policies over the past few decades that focus on shorter-term objectives, outcome measurement, and different rationale/analyses regarding the causes of inequality. These trends have had an impact on and been impacted by philanthropic giving in the sphere of public education, largely influenced and reinforced by high-net-worth individuals whose philanthropic activities mirror their business approaches.

By addressing the trade-offs, as well as the potential vulnerabilities and risks to the achievement of the SDGs, our aim is to contribute to ongoing efforts that promote meaning and responsible philanthropic and private sector engagement.

Distribution problems inherent in the correlation observed between surges in individual and corporate wealth and the rise of philanthropy and other private sector engagement, for example, raise very basic legitimacy concerns. If activating philanthropic and other private sector actors requires substantial and sustained economic growth, domestic philanthropy and other private sector engagement will not play a significant role in achieving SDG 4 in struggling economies. This potential problem can be remedied by contributions from foreign philanthropic actors, at least to some degree. However, popular suspicion of charities and the resulting reticence among foundations towards

grant-making (as observed in Brazil and China), restrictions on foreign NGOs (as observed in China and India), and the targeting of tax incentives at domestic philanthropy (as observed, in varying degrees, across Brazil, China, India and the United States) may frustrate such efforts.

The growing salience of philanthropy for businesses, the philanthropic commitments of business founders and leaders, and the increasing prevalence of philanthropic practices drawn from the business sector also create serious legitimacy risks. New donors and the business-inflected practices they implement make available not only the fortunes of multinational companies and the high-net-worth individuals behind them, but also non-financial resources such as products, employee time, and employee know-how. While vast capital and in-kind resources to address some of global education's most challenging problems bring wonderful potential for social goals, new donors' priorities and preferences do/will not necessarily map onto public priorities and needs identified under SDG 4. The authors caution that while new donor and institutional agendas can enhance scale and innovation, adapting business methods and models to educational funding creates distinct challenges for philanthropic transparency, accountability and legitimacy.

How can these challenges be addressed to contribute to ongoing efforts to promote meaningful and responsible philanthropic and private sector engagement in education and development? Ensuring the legitimacy of philanthropic actors engaged in educational development requires them to be transparent and accountable to their missions, to governments and to the wider public. Governments, charitable and philanthropic organisations, and their corporate and individual donors, as well as sector networks and associations, can all respond to the transparency and accountability gaps that endanger the legitimacy of philanthropic and other private sector involvement in education and development.

Examples from the four focal countries illustrate these risks but also indicate how committed donors, philanthropic institutions, and governments can proactively mitigate them. In the U.S., donors who pursue their philanthropic goals through donor-advised funds or LLCs elude requirements regime intended to ensure public input into and scrutiny of philanthropy (Brakman Reiser and Dean 2023), avoiding the obligation to spend tax-advantaged donations on a publicly regulated timeline. Donor-advised funds also make donors' philanthropic activity difficult to track. LLC structures evade all governmentally imposed limits on philanthropic activity and provide the public with only the information each LLC chooses to share. The newly invigorated Chinese charitable trust form likewise offers donors less onerous disclosure and other regulatory obligations than foundations face, presenting similar risks (Lin 2018). Elsewhere, contracts governing social and development impact bonds provide transparency and accountability only to those party to deals, not broad, accessible information about the conduct and outcomes of funded projects. The ability to operate entirely outside public view, unless donors and funders opt for disclosure, can 'create the wrong kinds of incentives for measuring outcomes' (OECD 2018). Conducting philanthropy through corporate social responsibility programs, as widely practiced in Brazil and mandated in India, similarly obscures philanthropic inputs and outcomes.

Even donors/organizations that provide regular disclosure need to improve data specificity and consistency across their different initiatives for reports to provide a clear view of organizational priorities, operations, and outcomes – which would keep

them accountable around conflation of corporate/economic priorities and social objectives. In some instances, for example, corporate social responsibility programs styled as philanthropy merely refashion marketing efforts or product or market development programs, rather than effectively and efficiently address legitimate public needs. To make this less likely, a mandatory program in India now designates areas of public concern appropriate for corporate social responsibility spending, including education, poverty alleviation, and disaster relief (Afsharipour 2018; Kassam, Handy, and Jansons 2016). In the U.S., on the other hand, commercially-affiliated sponsors of donor-advised funds have little incentive to speed the distribution and use of donated funds to operating charities that could deploy the funds for public needs rather than merely hold and invest them. Proposals to impose or incentivize minimal distribution levels would force such spending and channel donated funds to charitable purposes (ACE Act, S. 2021) – but have not been taken up by lawmakers. The authors note that it will be difficult for governments plagued by corruption or suspicious of philanthropists as unwelcome policy competitors to serve this ameliorative, balance-seeking function.

Encouragingly, some elite philanthropists have taken steps in this area. For example, though structured as an LLC, CZI has made exemplary efforts to ensure the transparency of its charitable giving; the website discloses all recipients and associated grant amounts, and giving made through the affiliated Chan Zuckerberg Foundation are also transparent in tax disclosures. Increased transparency around grant outcomes and investments in social enterprises and advocacy efforts would further improve public perspectives regarding CZI's philanthropic legitimacy. Founders of Chinese charitable trusts could likewise disclose their activities voluntarily, and donors everywhere can increase opportunities for input from the wider philanthropic community, government, and public. Tencent Charity Foundation, for example, established transparency as a key value and embedded it within its massive funding platform (Tencent 2018), harnessing new technologies to build legitimacy in a culture where many remain suspicious of charities.

Emphasis on outcomes built into social and development impact bond structures to reassure investors can similarly be mined to increase transparency, public input, and accountability. Social and development impact bond deals could require disclosures or even stimulate opportunities for discourse on how well the interventions they finance perform in achieving social goals. Developing transparency and accountability as industry-wide best practices would enhance the legitimacy of such pay-for-success programs, provided the communities in which they operate possess sufficient government or public capacity to engage in robust assessment.

If we look at pursuits to achieve SDG 4 in struggling economies, contributions from foreign philanthropic actors can quickly eclipse domestic philanthropic and even government influence, impact, and voice. Yet, popular suspicion of charities and resulting reticence among foundations toward grant making (observed in Brazil and China), restrictions on foreign NGOs (observed in China and India), and the targeting of tax incentives at domestic philanthropy (observed across Brazil, China, India, and the U.S., to varying degrees) are emerging as boundaries to that possibility.

Governments, charitable and philanthropic organizations, and their corporate and individual donors, as well as sector networks and associations, can all take action to address transparency and accountability gaps. Charitable and philanthropic actors operate without a public mandate or political accountability and have varying disclosure

obligations. The existence and extent of disclosure mandates also differ by jurisdiction, donor type, legal form and area of activity. Enhancing the transparency of charitable and philanthropic actors, whether individuals or businesses, will increase information about funding allocation, use and effectiveness. Regulators, the public and other members of the philanthropic sector can use this information both to challenge actors' priorities and implementation and to learn and scale effective interventions. Transparency will not only inspire debate, but also enhance efforts to create complementarities, craft technological solutions and improve training and implementation.

Sector-level expectations that best practices will incorporate transparency would be valuable. Regulatory transparency mandates, an obvious first step, require careful design (Fung, Graham, and Weil 2007), particularly to limit required disclosure to useful information, an unrealistic requirement in many overtaxed bureaucracies. Effective disclosure mandates make useful information available without swamping the resources of small and nascent organizations. Governmental disclosure requirements should thus constitute a baseline augmented by incentives, norms, and best practices. Charitable and philanthropic organizations, their donors, and sector networks and associations can offer incentives for additional transparency. Individual, corporate, and bilateral and multilateral donors can demand transparency from organizations to which they contribute and with whom they partner. Grant-making foundations can impose transparency requirements for grant awards and retention. Professional organizations can make transparency a condition to gain access to the benefits of their networks. Grant-making and network organizations should also disclose their own funding patterns, activities, and outcomes, setting an example and establishing useful templates to underpin organizational legitimacy and public trust.

Failures of accountability range from misappropriation of philanthropic resources to non-compliance with internal and external standards for philanthropic operations and veering off mission to pursue alternative public objectives or even private gain (Patil 2024). When uncovered, breakdowns in accountability damage the reputation not only of the organization in question, but also of others within its sphere. Though accountability failures cannot be reduced to zero, improved accountability measures will contribute to the performance of philanthropic organizations and safeguard public trust in their legitimacy.

Given the wide range of forms adopted by charitable and philanthropic organizations active in education and development, and wide-ranging legal and political environments in which they operate, a universal accountability regime is impossible. Accountability measures must instead be tailored to organizational type and size and provide information and reassurance to internal and external stakeholders. Depending on the organization, appropriate accountability measures may be as simple as regular meetings and compliance with a record-keeping system, or involve complex internal controls and/or external auditing. Ideally, any accountability regime a charitable or philanthropic organization adopts will integrate transparency standards, giving public and private partners and beneficiaries the knowledge and opportunity to provide process and progress input.

Actors across the philanthropy ecosystem can take steps to make accountability a priority. National, state, and local regulators/regulations impact the accountability norms of charitable and philanthropic organizations within their jurisdictions. Donors

of all types can prioritize the existence and robustness of accountability measures as a factor in decisions about which organizations to contribute to or partner with. Sector networks, professional associations, and academic centers can develop standards of excellence and disseminate best practices around accountability. These actors can make particularly important contributions by providing training, convening opportunities, and technical assistance to charitable and philanthropic organizations struggling to design and implement accountability measures. Donors can support these efforts with funding and in-kind contributions. Accountability mechanisms designed to facilitate public input are only impactful if engaged participation occurs, so stakeholders at every level have crucial roles to play, as well.

6. Conclusion

This article analyzes new, elite donors' use of for-profit corporate and private philanthropic vehicles and mechanisms to achieve philanthropic goals across the U.S., Brazil, China, and India. The authors highlight the need to ensure that these actors are/remain transparent and accountable to their missions, local governments, and wider public. Governments, charitable and philanthropic organizations and their corporate and individual donors, and sector networks and associations can all act to address transparency and accountability gaps that endanger the legitimacy of philanthropic involvement in education and development.

Specific steps should include safeguarding public goods and the state's ultimate responsibility to ensure the right to education with due diligence and thoughtful navigation of the trade-offs, vulnerabilities, and risks inherently associated with private actor involvement. This will involve appropriate regulation, as well as support for research examining this emerging landscape. Improved understanding of private sector corporate and philanthropic enactment of agendas within the social sector will both allow for and contribute to more accurate capture, analysis, and critique of modes of practice and influence beyond financial flows.

Governments and public audiences alike are aware of the manifold and unique contribution potential of for-profit corporate and private philanthropic actors, and rightly wary of magnifying elite and unaccountable influences on the social agenda. To best align the efforts of non-state actors in pursuit of SDG 4, and bolster legitimacy across the board, the wider international development community can take steps to enhance transparency around philanthropic contributions, activities, and outcomes. Such measures will simultaneously improve those actors' accountability to their own missions and stakeholders.

Only through norms of public input, debate, and learning can the vast opportunities being channeled through new, business-grounded models and philanthropic organizations be leveraged in legitimate ways. A number of development actors are already putting into place mechanisms articulated through existing norms and standards, exploring ways to regulate collaboration with a view to the public interest, and/or promoting research on scale and impact (see the Abidjan Principles 2019; Adamson et al. 2021; Global Partnership for Education 2024; OECD 2018; OECD netFWD 2024; United Nations Global Compact 2021).

Inspired by Verger, Fontdevila, and Zancajo (2017), the authors' future research with regional experts will seek to develop a typology addressing various pathways to philanthropic enactment in Brazil, China, India, and the U.S. today. Using historical institutional analysis, that research will also further explore *why* new philanthropic actors make choices and create processes differently, and *how* different philanthropic enactments shift relational state and other power dynamics in different country contexts.

Note

1. One of seventeen goals set by the United Nations in 2015 as part of Agenda 2030, the objective of SDG 4 is to 'Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all'.

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