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# Social investment strategies in European education : a comparative study of Italian new philanthropic organizations

Arianna Montemurro

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**Social investment strategies in European  
education: a comparative study of Italian new  
philanthropic organizations**

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## Abstract

The thesis is focused on social investment initiatives carried out by new philanthropic organizations through the use of their resources. In particular, the study explores two research objectives. The first objective is to investigate European digital education networks in which new philanthropic organizations are involved with public and private stakeholders. Indeed, as emerged from the literature review on new philanthropic actors dealing with European education, today Ed-Tech companies exercise a central role in the implementation of social investment strategies. The second objective is to explore how new philanthropic organizations mobilize their financial resources to advocate for education. Here, I focus on social inclusion as a core theme of advocacy actions and which emerged through interviews with employees of new philanthropic organizations. The methodological approach is centered on network ethnography based on Italian case studies and is used to present the data collection, visualization and analysis. The adopted network ethnography involves close attention to new philanthropic organizations and their relations in the global education policy field and to the connections that join-up these actors, to provide topological visualizations of networks of social investment in education.

## Résumé en français

La thèse se concentre sur les initiatives d'investissement social menées par des organisations de la nouvelle philanthropie à travers l'utilisation de leurs ressources. En particulier, l'étude explore deux objectifs de recherche. Le premier objectif est d'enquêter les réseaux européens d'éducation numérique dans lesquels des organisations de la nouvelle philanthropie sont impliquées avec des acteurs publics et privés. En effet, comme le montre la revue de la littérature sur les acteurs de la nouvelle philanthropie s'occupant de l'éducation européenne, les entreprises Ed-Tech exercent aujourd'hui un rôle central dans la mise en œuvre de stratégies d'investissement social. Le deuxième objectif consiste à explorer comment les organisations de la nouvelle philanthropie mobilisent leurs ressources financières pour plaider en faveur de l'éducation. Ici, je me concentre sur l'inclusion sociale comme thème fondamental des actions de plaidoyer et qui a émergé à travers les entretiens avec les employés des organisations de la nouvelle philanthropie. L'approche méthodologique est basée sur l'ethnographie de réseau centrée sur des études de cas italiennes et est utilisée pour présenter la collecte, la visualisation et l'analyse des données. L'ethnographie de réseau adoptée implique une attention particulière aux organisations de la nouvelle philanthropie et à leurs relations dans le domaine des politiques éducatives mondiales ainsi qu'aux connexions qui unissent ces acteurs, afin de fournir des visualisations topologiques des réseaux de stratégies d'investissement social dans l'éducation.

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## **List of abbreviations**

Associazione di Fondazioni e di Casse di Risparmio Spa: ACRI  
Artificial Intelligence: AI  
Digital Economy and Society Index: DESI  
Directorate-General: DG  
Early Childhood Education and Care: ECEC  
European Union: EU  
Education Technology: Ed-Tech  
Education Service Industry: ESI  
Global Education Industry GEI  
Information Communication Technology: ICT  
Istituto Nazionale di Statistica: ISTAT  
Istituto Tecnico Superiore: ITS  
Associazione Nazionale Comuni Italiani Lombardia: ANCI Lombardia  
New Public Management: NPM  
Non-governmental Organization: NGO  
Open Method of Coordination: OMC  
Public-private Partnerships: PPPs  
Recovery and Resilience Facility: RRF  
Science, Technology, Engineering and Mathematics: STEM  
United Nations International Children's Emergency Fund: UNICEF  
United States: US  
World Health Organization: WHO



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## General introduction

In recent years, we have witnessed the implementation of the new paradigm of social investment, which involves a redefinition of the relationship between the economic and the social spheres, and a redesigning of new ways of tackling social problems. The social investment paradigm brings together the work of local, regional, national and supranational organizations from the economic, social and political sectors, which carry out together the work of capitalist and non-capitalist actors in implementing a shared neo-liberal moral project. In this context, tasks that traditionally fell under the domains and responsibilities of government are now shared by private organizations.

Contemporary privatization is part of a broader redesign of the public sector. This redesign involves private companies, non-profit entities, voluntary organizations, non-governmental organizations (NGOs), social enterprises inside the public sector. In this scenario, the social policy explanation of welfare state transformation intersects with the governance narrative that sees the change as brought about by the new realities of globalization and rising neo-liberal economic pressures. In his book "Modernity and Self-Identity", Giddens (1991) argues that the fabric of societies has transformed as old solidarities of class, community, family and nation have deteriorated and people have become more consumerist, producing new models of social risks, needs and demands. Moreover, as explained by Ong (2017), neoliberalism is a governing technology of "free subjects" that co-exists with other political rationalities. In advanced liberal nations, neoliberalism has also been defined as a mode of "governing through freedom", requiring people to be free and self-managing in different areas of daily life, such as education.

In these last few years, we have seen the emergence of private actors in the field of education. International advisory firms, non-profit organizations, Corporate Social Responsibility divisions of commercial enterprises, individual consultants and a growing number of philanthropic foundations entered the field of education that was almost exclusively government domain. At the same time, we are observing a shift in education philanthropy. Hence, as philanthropic investment in education is on the rise, increasingly critical questions are being asked about the impact of the activities of private actors on educational systems. New corporate donors have entered the scene, using large amounts of financial resources and employing new and ambitious approaches even as their commitments to educational philanthropy raise critical questions of accountability and legitimacy.

According to Ball (2016), some trans-national policy actors in the field of global education policy are well researched, such as the OECD, the World Bank and the European Union (EU). Educational businesses, Ed-Tech companies and philanthropies compared have received much less attention from researchers, despite their significant impact on the reshaping of teaching and learning and on the conceptualization of education policy and governance within and across national jurisdictions (Hogan, 2015).

This thesis seeks to expand a body of research within policy sociology dealing with changes in the policy process and new methods of governing society (Ball, 2008), and to contribute to the conceptualization of policy networks in the field of education. The term “network” is used in this study as a theoretical device to “represent a set of “real” changes in the forms of governance of education, both nationally and globally”, and as a method, “an analytic technique for looking at the structure of policy communities and their social relationships” (Ball, 2012a, p. 6).

Thus, “the proliferation of policy-making sites and activities around the world and the increasing mobility and flow of education policy have significant implications for how we carry out policy analysis work and education policy research.” (Ball et al, 2017, p. 18 ). There are also few examples of direct research on the labour of networking, or which “follows” policy through networks, or addresses the work and movement of key actors or dealing with network evolution (Ball, 2016).

In this context, the popularity of the concept of “network” is an adequate methodological response to the change in governance and forms of the state. That is, the network as a device for both researching and representing policy allows policy researchers to shape their methods and analytic practices in relation to the global shift from government to governance (Rhodes, 1995, Ball & Youdell, 2008, Cone & Brøgger, 2020), or what is sometimes called “network governance”. This shift involves a move away from the administrative, bureaucratic, and hierarchical forms of state organization and the emergence of new “reflexive, self-regulatory and horizontal” spaces of governance: the heterarchies. The heterogeneous range of organizations and practices that constitute these heterarchies contributes to, reflects, enable, and require the semiotic and technical re-articulation of education and educational governance (Ball et al., 2017).

Therefore, the framework of policy analysis is also changing: the nation state is no longer a reasonable or practicable limit to the analysis of policy and governance. New relations and spaces of governance are being built that exist and operate above, beyond, and between national state systems. This entails a significant “shift in the center of gravity around which policy cycles move” (Jessop, 1998, p. 32).

An important consequence of the increased focus on policy movement and change is the imperative to reflect on how researchers might best move with the “transfer agents” and other policy actors who produce, disseminate, modify and consume policies through their daily work practices (McCann & Ward, 2012). According to Marcus (1995), in “following” as a research method, researchers are not just to follow people, but also things, metaphors, stories, and conflicts as mobile research objects. Whether working “forward” from where a policy originates or “backwards” from where it has arrived, this approach consists of tracing the places a policy has travelled through and questioning how the policy has changed or transformed along the way (McCann & Ward, 2012).

Network analysis also responds to the need for “new methods and concepts and new research sensibilities” (Ball, 2012a, p. 4) to better understand the “new actors, organizations, forms of participation and relationships” engaging in education policy and, more generally, in the “global expansion of neoliberal ideas” (p. 2). Network analysis is appropriate here both as a method for the analysis of educational governance, and as a representation of the actual social relations and sites of activity within which the work of governing is done (Ball & Thawer, 2019).

However, “there are relatively few examples of direct research on the effort and labour of networking, or which “follows” policy through networks” (Ball, 2016, p. 552). In this thesis, I seek to address some of these omissions and to extend a research series, which has sought to identify and explore global education policy networks, actively engaged with the reform of school systems, educational methods, and forms of educational governance and specifically the construction of a policy ecosystem that enables a market in state services and state work in diverse settings around the world (Ball & Thawer, 2019).

Finally, “all of this involves a re-working, or perhaps even an erasure, of the boundaries of state, economy, and civil society.” (Avelar & Ball, 2017, p. 8). Thus, the aim of this thesis is to understand something of the process of neoliberalism joining up policy network activities with a more general reshaping of economic and social values.

### **Outline of the thesis**

Following the concepts outlined in the previous section, the thesis is divided in three parts. The first part, entitled “Theoretical inquiry: new philanthropic networks in European education governance”, consists of four chapters that introduce the reasoning behind the empirical investigation and allows me to answer the research question on how new philanthropic organizations promote social investment in European education by mobilizing their resources.

Thus, Chapter 1 addresses the question, the two objectives and the related hypothesis of the research in the framework of the sociological literature in the field of networks for social investment in European education, placing the study in a policy network perspective. Here, the network is understood as a means to represent social relations within the field of policy (Ball, 2008).

Chapter 2 presents the methodology of the research, which is related to network ethnography and involves three sets of activities: internet searches around particular new philanthropic organizations and philanthropically funded programs; interviews with some key employees in new philanthropic organizations involved in education, and participation in some related meetings; the use of these searches and interviews to construct graphs displaying policy networks (Ball & Junemann, 2011). Some examples of policy networks focusing on philanthropic “players” in the field of social investment in European education are offered in the thesis to indicate the new sorts of relationships that operate in relation to education policy thinking and service delivery (Ball & Junemann, 2011, p. 647).

Chapter 3 shifts the focus to the theoretical sensibilities underlying my analysis and develops an appropriate conceptual framework for studying strategies of social investment in European education implemented by new philanthropic organizations. The theoretical framework refers to considerations on private actors represented in committees, trusts, boards, authorities, agencies and councils that are connected to and do the work of the state, particularly in the field of education (Ball, 2008). The chapter



goes on to describe the dynamics of the involvement of digital technologies in education governance and the prominent role of Ed-tech companies in shaping education policies.

Chapter 4 presents the Italian social and legal background in which the empirical analysis develops, emphasizing how neo-liberal policies are entering the field of education, above all through the recent reforms. The chapter also underlines how “policy philanthropists-entrepreneurs are trying to lead the way in re-thinking education according to the new imperatives of the globalised economic imperatives” (Grimaldi & Serpieri, 2013, p. 445).

The second part of the thesis, entitled “Social investment strategies in education advocacy: an analysis of the policy-scape”, is composed of three chapters presenting the Europeanization context in which new philanthropic organizations carry out their actions of education advocacy in Italy, which constitutes this research fieldwork. Therefore, understanding how new philanthropic organizations operate in Italian education governance fits in wider efforts of understanding European trends of education policy. Furthermore, this second part of the thesis deepens social investment dynamics in relation to the education advocacy strategies introduced in Chapter 10.

Chapter 5 examines the policies implemented in Italy to improve early childhood education and quality in the educational system in the light of the European Child Guarantee implemented in 2021. This policy initiative is being examined for its efforts to combat social exclusion and ensure that children and adolescents have free access to education, challenging specific disadvantaged situations, such as those of minors in precarious family backgrounds. Furthermore, the implementation of this measure in favour of disadvantaged Italian children is analyzed in relation to the interaction of different types of actors linked by cooperation dynamics to achieve social inclusion in education, such as ministries, municipalities and regions, demonstrating a shift towards new forms of governance composed of actors “doing” policy in new ways, joined up in complex and evolving social networks (Junemann et al., 2018).

Chapter 6 introduces the policies that focus on youth participation to achieve educational change, adopting the principles of the European Pillar of Social Rights, implemented for the proper functioning of social protection systems. The chapter also presents examples of projects carried out by the NGOs Teach for Italy and Ashoka Italia and by the Learning for Well-being foundation, whose employees were interviewed during the data collection phase, to build an inclusive educational system and enable young people to achieve educational change.

Chapter 7 focuses on policies implementing inclusive digital technologies in education to empower students. Therefore, illustrations are provided of recent initiatives to build an inclusive European information society that can offer citizens a better quality of life by increasing accessibility, closing skill gaps and accelerating the effective participation of those who are at risk of social exclusion. At the European level, the analysis focuses on the European Declaration on Digital Rights and Principles for the Digital Decade, implemented in December 2022 to empower students and teachers with digital skills.

The third part of the thesis, entitled “Empirical inquiry: social investment strategies in Italian education” comprises of a further 3 chapters which present the empirical data and discuss the implications of the findings based on Italian case studies. The methodological approach based on network ethnography

focused on Italian case studies is then set out and used to present the data collection, visualization and analysis. Furthermore, the choice of the Italian fieldwork is due to the fact that Italian new philanthropic organizations echo the characteristics of similar entities in other countries, with a growing relevance of their influence on education governance, which will be deepened in chapters 9 and 10.

Chapter 8 outlines the theoretical contribution of this thesis for practitioners of social investment in education. It also presents three implications drawn from the findings of the empirical analysis and discusses the theoretical and methodological inferences of the network dynamics emerged in the investigation related to the first and second objectives of the research.

Chapter 9 presents the findings concerning the first objective of the research. One of the two objectives of the study was to investigate European digital education networks in which new philanthropic organizations are involved with public and private stakeholders. Furthermore, as emerged from the literature review on new philanthropic actors in European education, today Ed-Tech companies exercise a centrale role in implementing social investment strategies. Therefore, the chapter seeks to answer the hypothesis of the research: do new philanthropic organizations promote social investment in European education through the digital education networks in which they are involved? To this end, the chapter presents a data analysis based on interviews and data visualization built on network graphs displayed using the Gephi manipulation tool ([www.gephi.org](http://www.gephi.org)), which is an open-source software for network analysis (Bastian et al., 2009). It also illustrates the Italian case study Fondazione Cariplo (Saving Bank Foundation of the Lombardy Provinces, Fondazione Casse di Risparmio delle Province Lombarde) in relation to its involvement in networks of new philanthropic organizations implementing social investment strategies in the field of education.

Chapter 10 explores the second objective of the research, that is to investigate how new philanthropic organizations mobilize their financial resources to advocate for education and tries to answer the second hypothesis of the thesis: the new philanthropic actors give voice to a wide range of advocacy groups for social inclusion in education by mobilizing their resources. In fact, to analyze the second objective of the study, I focus on social inclusion as a central theme of the advocacy actions and that emerged through the interviews with the employees of new philanthropic organizations.

The chapter also analyzes some advocacy practices using the network ethnography. It describes an Italian education advocacy network based on data collected through interviews with employees of new philanthropic organizations and focuses on the advocacy practices adopted by these actors to pursue social inclusion in education, through different actions: redefining childhood education, improving quality in the educational system, pursuing educational change and empowering students in digital skills.

Chapter 11 summarizes the salient points of the theoretical and methodological approaches. It also introduces some future research directions related to the issue of social investment in European education that need to be further explored by practitioners in the sociology of education.

## **Part I**

**Theoretical inquiry:**

**new philanthropic networks in European education governance**

## Introduction of the first part

In the first part of the thesis, the subject and hypothesis of the research are introduced. The methodology used to examine social investment dynamics is also illustrated and refers to network ethnography. Hence, drawing from Ball and Junemann (2012), I introduce the concept of “policy network” as the focus of the theoretical framework in which the study develops throughout the chapters, underlying the central role of the networks as means for representing social relations within policy strategies. In addition, focusing on a network method, I consider issues of governance in education, carried out through the flexible authority of networks or heterarchies (Ball & Junemann, 2013).

After introducing the theoretical framework focused on trans-national policy networks in education, the presence within these networks of private actors (NGOs, associations, social enterprises, etc.) is highlighted and characterized by a “sensitivity of giving” aimed at solving the problems of state education. Consequently, I illustrate the main dynamics of the new philanthropic governance that assumes moral duties previously assigned to state agencies.

I also explain how new philanthropic organizations are using enterprise models based on venture capitalism to see a return on their donations, encompassing the so-called “philanthrocapitalism”, i.e. hedge funds invested in charitable projects through money-market strategies, research tools and techniques to manage the performance of financings.

Finally, focusing on Italy as the research fieldwork, I introduce the Italian socio-legal background in which the third sector organizations, defined as a social and economic sphere “not attributable to either the State or the market” (Polizzi & Vitale, 2017, p. 102), examined in the empirical phase of the study implement social investment strategies in education. Indeed, today, in Italy, philanthropies act as key nodes in the design, development and implementation of policies, driving the “re-thinking” of education according to the new economic requirements (Grimaldi & Serpieri, 2013).

# Chapter 1

## Introduction to the thesis

This introductory chapter to the thesis illustrates the research that is developed across the following sections. The focus of the study is on social investment in European education, specifically on the promotion of social investment initiatives by new philanthropic organizations through the use of their resources. In this first chapter, the conceptual framework across which the analysis moves is introduced and some of the key components of the thesis, such as the research questions and the two hypothesis are discussed. The literature review is presented and the position that I take in respect to this literature is also outlined.

Throughout the chapter, I underline that the study draws on the role of new philanthropy and the financial resources mobilized in global education networks, with a special focus to digital governance in education within a European perspective. The methodology of the research related to network ethnography is delineated in the third paragraph and will be deepened in chapters 9 and 10 of the thesis.

### 1.1 Presentation of the subject of the research and hypothesis

In order to present the focus of the study, in this paragraph, the research question, objectives and hypothesis are introduced. I begin by exploring new philanthropic organizations as privileging “market-based” solutions to solve emerging problems, such as social exclusion in education. Then, I present the two lines of inquiry of the research through an explicative model addressing issues and questionings of this thesis. The introduction of these lines of investigation is essential to give an overview of the entire study and its main focal points, which will accompany the development of the empirical demonstration along the various chapters.

#### 1.1.1 The subject of the research

The subject of this research is the promotion of social investment in European education by new philanthropic actors. In the last decades, within the “marketizing” of relations between schools (Ball, 2008) a variety of providers and participants in education provision, such as charitable organizations, philanthropists, commercial sponsors and non-profit organizations have become part of schools, which are now “joined up” in new ways in networks.

The promotion of social investment by these new philanthropic actors raises our research question: how do new philanthropic organizations promote social investment in European education by mobilizing their resources? This thesis also aims to answer to two hypotheses: 1) new philanthropic actors are able to promote social investment in European education through the European digital education networks in which they are embedded, and 2) they give voice to a wide range of advocacy groups for social inclusion in education by mobilizing their financial resources.

In this study, I introduce a network ethnography of Italian case studies in different stages in order to answer to the research question and the two hypotheses, which are presented in the next sections. The first step of the network ethnography has been focused on a documentary analysis concerning several types of sources issued by philanthropists, such as reports, brochures, business analyses, events' programmes, manuals, background papers, philanthropic organizations' financial results, charts, press releases, program proposals, survey data, public records, etc., and European institutions documentary sources on funding for new philanthropic initiatives in digital education; the second step involved semi-structured interviews with members of the new philanthropic organizations focused on social investment in European education. Further clarifications about the network ethnography conducted will be introduced in the third paragraph of this chapter entitled "Methodology".

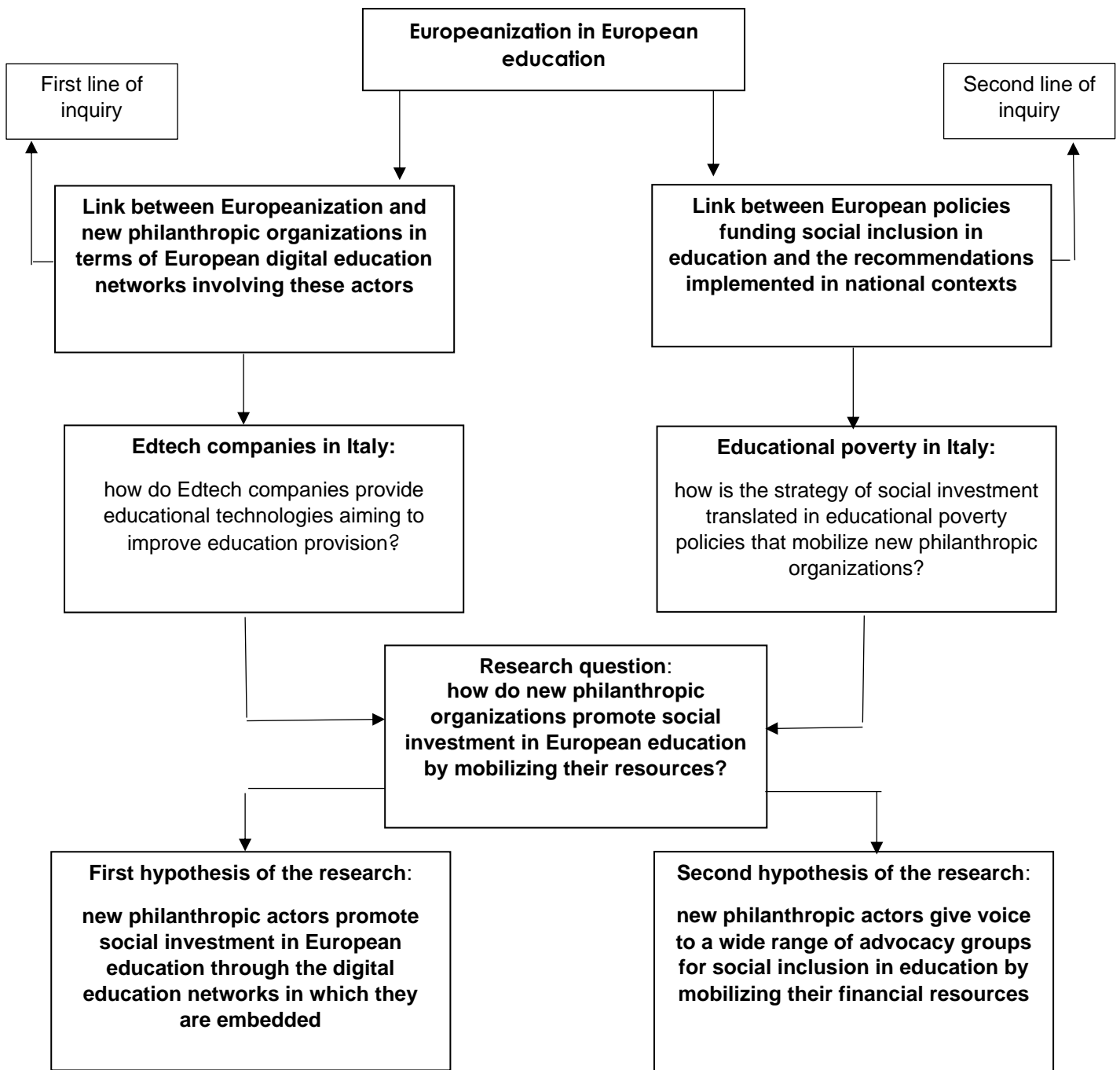
### **1.1.2 The research question**

As outlined above, the research question in this study investigates how new philanthropic organizations promote social investment in European education by mobilizing their resources. Nowadays, as Ball and Olmedo state: "the ways in which social and educational problems are being organized and addressed, nationally and globally, are changing in response to the methods of 'new' philanthropy and the privileging of 'market-based' solutions to these problems" (Ball & Olmedo, 2011, p. 83).

Moreover, through the introduction of this market form into public provision, what is achieved is not simply a new mechanism of resource allocation but also the creation of a new "moral environment" of consumers and producers, in which moral and financial dimensions are intertwined, and articulated in terms of social risk and return in relation to mechanism of scale and sustainability. In this context, philanthropists of various kinds take on the moral responsibilities of the state articulated within a complex global architecture of relations (Avelar & Ball, 2017).

In this philanthropic landscape, local, regional, national and supranational organizations from the economic, social and political fields are expected to assemble together the efforts of capitalist and non-capitalist actors in the enactment of a shared neo-liberal moral project. In addition, in this thesis, according to Shamir (2008, p. 6) I refer to new philanthropists as individuals who "assume socio-moral duties that were previously assigned to civil society organizations, governmental entities and state agencies." A research model clarifying the two lines of inquiry, objectives and hypothesis of the research is provided below.

**Figure 1.1 Lines of inquiry, research question and hypotheses**



### **1.1.3 The first objective and hypothesis of the research**

The first objective of this study is investigating the European digital education networks in which new philanthropic organizations are involved together with public and private stakeholders. As noted in the outline of the thesis, the first hypothesis of the research related to this objective is: “new philanthropic

actors promote social investment in European education through the digital education networks in which they are embedded”.

In recent years, the figure of the network has featured prominently in research on education and technology (Williamson, 2019). Moreover, as explained by Peruzzo et al. (2022), global digital education networks are shaped by digital technologies and platforms, that become new edges and nodes inside these transnational networks and are promoted by “tech people”. Education technology (Ed-Tech) has also been aggressively marketed as a suite of products and services that can both improve student learning by presenting students with more engaging lessons, and enable more individualized instruction (Regan & Khwaja, 2019).

Transnational networks in global education governance are also introduced by Viseu, who refers to new actors and structures regarding a new philanthropy reasoning in global education governance (Viseu, 2022). In this research, I deal with global digital education networks to study new philanthropic organizations aimed at social investment in European education and, in order to answer to the first hypothesis of the research, I present in the third part of the thesis a provisional mapping of emerging new philanthropic actors in digital education governance in Europe, focusing on Italian fieldwork, with an attempt to highlight similarities, differences and relations between these actors through a comparative analysis.

In order to map the digital education networks in which new philanthropists are involved to promote social investment in European education, I have analyzed the ethnographic material collected through the documentary sources and interviews conducted from 2018 to 2022. Then, I have put in relation the background and role of the new philanthropic organizations’ employees that I have interviewed and the information that they have given to me through the interviews, to understand which the main nodes inside these European digital education networks are, and the peripheral ones.

Finally, as explained by Regan and Khwaja, the investigation of the network structures of investors and their roles is imperative for an understanding of the crucial implications of funding for Ed-Tech (Regan & Khwaja, 2019). This consideration raises the second objective of the thesis, that is related to how new philanthropic organizations mobilize their financial resources in order to advocate for inclusion in education in groups or communities. The second objective of the research is introduced in the next section.

#### **1.1.4 The second objective and hypothesis of the research**

As noted above, the second objective of this study is investigating how new philanthropic organizations mobilize their financial resources in order to advocate for social inclusion in education. Consequently, the second hypothesis of this research is: “new philanthropic actors give voice to a wide range of advocacy groups for social inclusion in education by mobilizing their financial resources”.



In particular, the recent centrality of education as a space for investment and profit-making within financial markets is apparent in the emergence of “eduspace” players, such as non-profit investment ventures, financial advisors, education private equity investors, incubators and funds (Santori et al., 2016). In the broader context of the neo-liberal shift towards education governance, these new philanthropists participate in education policy-making as “policy entrepreneurs” or specialists creating and maintaining invaluable relationships with policy-makers, beyond what is traditionally understood as “advocacy” (Avelar, 2018).

Moreover, the focus of the second hypothesis is on the “funding” component of the relationship between new philanthropy and society. Indeed, within social investment networks, venture capital funding is one of the sources of finance for Ed-Tech market, together with personal spending from billionaire entrepreneurs, and philanthropy from individuals and companies (Regan & Khwaja, 2019).

Concluding, in order to answer the second hypothesis of this research, I analyzed the information on the resources used to develop social investment projects in European education advocacy that the new philanthropists provided me through the semi-structured interviews conducted in the different phases of the thesis.

## **1.2 Positioning of the thesis, problems and theories**

After presenting the main questionings of the thesis, in this second paragraph of the chapter the positioning of the research is provided. The contribution to the field of study is also introduced and followed by a literature review on new global policy networks in education. Hence, this literature addresses the role of resources within the policy networks comprising social entrepreneurs and business philanthropists, who are transforming education under the promotion of digital technologies and social inclusion.

### **1.2.1 Positioning**

This thesis is located at the intersection between sociology of education and policy sociology. Nowadays, sociological concepts, ideas and research are needed as tools for making sense of education policy. In fact, within a context of time and space compressions caused by globalization and the subordination of education to the competitive pressure of the global market, in which Information Technology facilitates the virtual connection of students to a digital schooling community, one recurring theme is the analysis of the relationship of education policy to the needs of the state and the economy (Ball, 2008).

Furthermore, policy sociology in education can be defined as the application of social science approaches to the study of education policy (Ozga, 1987). Moreover, Ball set the originary of

foundational canon of policy sociology in education, providing a critical and contextualized account of policy steering of educational systems. His research in policy sociology of education emphasizes the attention given to the language of policy (rhetorics and discourses), not in terms of a focus on language for its own sake but as a way of seeing how policy discourses work to privilege certain ideas and topics and speakers and exclude others (Lingard, 2013). Drawing from his considerations in policy sociology of education, in this research a particular attention is given to the changing in educational institutions, their relations to economy and to Information and Communications Technology (ICT) and to international economic competitiveness, that require to rethink, or “reimagine” education (Ball, 2008).

Finally, the Covid-19 pandemic and related recent measures of school closures have triggered an urgent need for critical scrutiny of how digitalization is reshaping the worlds of education (Decuyper et al., 2020). As a consequence, a distinctive approach of “pandemic pedagogies” related to the emergence of educational technologies has spread in 2020, when distance education and remote teaching have taken a new salience, stemming debates about “emergency remote education” in a contextual recognition of the extraordinary circumstances in which they have developed. These “pandemic pedagogies” have become the center of attention of Ed-Tech industry, which is the focus of the first objective of this research. Therefore, the thesis is linked to the concepts of “emergency remote education”.

### **1.2.2 Contribution to the field of study**

This thesis makes a contribution to understanding how new philanthropic actors promote social investment in European education and gather opportunities to increase their benefits, by using resources to provide digital products to teachers and students. Nowadays, not all young people are the well connected, but there is a certain variety in the ways that they can access and use the internet and new technologies, with a minority who are excluded from education and social networks (Williamson et al., 2020). Hence, as explained in the previous section, business actors are transforming education under the promotion of digital technologies (Williamson, 2020).

This research explores the economic resources owned by the new philanthropic organizations and provided to finance projects for social inclusion in European education through the implementation of digital technologies. As stated by Regan and Khwaja, “in the past decade, a surge of investment in the Ed-Tech industry and the emergence of powerful firms have resulted in complex, entangled interrelationships that have affected the content and delivery of education at all levels” (Regan & Khwaja, 2019, p. 1). However, there are still relatively few examples of direct research in education on the work of networking, which addresses the movement of key actors (Nambissan & Ball, 2010). Moreover, this investigation challenges the economic dimension of new philanthropic networks focused on social investment in education in Europe, which is theoretically underdeveloped, and it is to this gap that the thesis is addressed.

The thesis also makes a theoretical contribution by exploring the connection between Europeanisation and the initiatives of new philanthropic networks towards social inclusion in European education. In fact, at the European level, the implementation of the Digital Single Market strategy has brought together the education and economy dimensions, defining new digital skills and enhancing new modalities of teaching and learning. This transformation of European education and policies, within the framework of a renewed sociology of education, requires an analysis of digital education networks concerned with the European dimension.

At the same time, there are issues that, for reasons of space, cannot be pursued here. Although I recognize the importance of philosophical, pedagogical, and ethical controversies and the policy issues generated by the promotion of digital technologies in European education, in this thesis I do not focus on critic questioning on the negative implications for student privacy and socialization or the values that should be reflected in Ed-Tech applications.

Moreover, in this research the experience of the choice process in education, and the qualitative difference between those students of the more privileged classes and the disadvantaged ones is not explored. Nor do I examine mechanisms of social closure that reproduce inequalities in education and racial and gender discriminations. Rather, I consider these issues as a necessary development of future research in education.

### **1.2.3 Theoretical framework**

As noted in the first paragraph, the research question for this thesis concerns how new philanthropic organizations promote social investment in European education by mobilizing their resources and is placed within a theoretical framework focused on policy network perspectives.

According to Ball and Junemann (2012, p.3), policy networks are “both a real change in the structure of the policy and an emergent and distinct form of governance and a move beyond the methods of New Public Management”. In this thesis, according to the research question, I drawn from Rhodes (1995) who emphasizes the importance of resources (money, information, expertise) owned by networks to achieve their objectives. Furthermore, some of the financial resources that new philanthropic actors are putting in place in European networks for social investment in education are introduced in the third part of the study.

The network is recognized “as a means for tracing and representing social relations within the field of policy” (Ball, 2008, p. 3). Focusing on the network method, it is worth considering issues of governance, which has been used extensively in recent political science and is done in the social relations within policy-networks (Ball & Junemann, 2012). A contrast is drawn here between government as accomplished through hierarchies, within bureaucratic methods, and governance as carried out through the more flexible authority of these diverse networks or heterarchies (Ball & Junemann, 2013).

In these governance by networks, dispersed resources are mobilized towards the solution of policy problems (Pal, 1997) and are indicative of what Jessop calls “destatization”, a new public-private divide, reallocating tasks and rearticulating the relationships between organizations and tasks across this divide (Jessop, 2002). Within these changes referred to as “Anglo-governance model”, the state is not “hollowing out”, rather is now dependent on a vast array of state and non-state policy actors (Marinetto, 2003) to solve “wicked social problems”. “Wicked social problems” are interrelated and complex, thus difficult to understand and even more difficult to respond to, especially if responses are limited to traditional solutions that have failed before. ‘Wicked’ problems typically involve many stakeholders with different values and problems and have long histories and tangle origins and causes.” (Ball & Junemann, 2012, p. 5). Hence, network governance brings new solutions to bear upon such problems by catalyzing public, private and voluntary sectors. “that is argued, not only do policy network blur the boundaries between state and society but they also expose the policy-making process to particularistic power games.” (Ball & Junemann, 2012, p. 7).

Policy networks constitute new kinds of policy communities, usually based upon shared conceptions of social problems and their solutions. Inside these policy communities, not all actors play the same power game and are equally significant. Hence, in these social networks, business, non-governmental agencies and government bureaucracies are interlinked and there is a recurrence of particular companies and people, related to particular kind of policy ideas. These new policy communities also draw “energies” by entrepreneurial and policy “heroes”, who are social entrepreneurs and business philanthropists (Ball, 2008).

Within these networks, what is new is the “direct relation of ‘giving’ to “outcomes” and the direct involvement of givers in philanthropic action and policy communities. That is, a more hands-on approach to the use of donations” (Ball & Junemann, 2012, p. 49). Moreover, according to Shamir (2008), through individual philanthropic action, companies assume socio-moral duties that were previously assigned to civil society organizations and state agencies. These “new sensibilities of giving” are based upon the increasing use of enterprise models as a new form of philanthropic organization, practice and language, such as venture philanthropy, philanthropic portfolios, due diligence, corporate-funded and individual foundation, trusts, etc. Therefore, this new philanthropy is also defined as “strategic philanthropy”. In this context, projects are looked at in terms of the possibilities of “replication” and business research is used to identify particular potential recipients of donations. Indicators are also used to monitor the impacts and effects of donations on social problems and methods of private equity investment and calculation are involved (Ball & Junemann, 2012).

New philanthropy also encompasses the deployment of venture capitalism strategies and the funding of innovative and “risky” solutions to “wicked” social problems. This is called “philanthrocapitalism” (The Economist, 2006) and is the idea that funders normally expect to see a “return” on their donation and benefactors become consumers of social investment. A further development of this approach is the introduction of a financial return on “investment” in solution to social problems, as in the case of Social Impact Bonds. In this scenario a “new new philanthropy” emerges, that is hedge funds of private equity managers who via their foundations choose to invest their donations in charity projects and use money-

market strategies, research tools and techniques to manage the performance of their portfolios (Ball & Junemann, 2012). Table 1.1 introduces the different types of philanthropy and their main activities.

Thus, “as part of these changes, global education policy communities are being reconstituted and are evolving, and new policy discourses and narratives are flowing through them. These new global policy networks, integrated by a diverse set of think tanks, consultants, multi-lateral agencies, donors, education businesses, and philanthropies, constitute policy communities that are based upon shared conceptions of social problems and their solutions.” (Junemann et. al., 2016, p. 537). In addition, as stated by Ball (2008), it is important to recognize the political functions of these networks, giving space to new voices within policy talk. New policy actors also “work” the public sector through linkages and alliances around policy concerns. Moreover, new values and modes of action are legitimated and moral authority established.

Finally, there is scope to study the networks in European strategies for social investment in education governance, using network ethnography to explore the “network” aspects of this governance in more detail. Network ethnography is a developing method of research, or an assemblage of research tactics and techniques, engaging with policy topography of networks. Hence, although having the main empirical setting of Italian new philanthropic organizations, this research analyses European networks for social investment in education that surpass national borders. The use of network ethnography to investigate these networks will be introduced in next paragraph.

**Table 1.1 Different types of philanthropy**

<b>Type of philanthropy</b>	<b>Starting period</b>	<b>Main activities</b>
<b>Palliative philanthropy</b>	XVII century	Altruistic donations
<b>Developmental philanthropy - Elite philanthropy</b>	1980s	Voluntary giving by wealthy individuals or families
<b>New philanthropy – Venture philanthropy – Profitable giving</b>	Second half of the 1990s	<ul style="list-style-type: none"> <li>Direct involvement of givers in philanthropic actions</li> <li>Adoption of commercial and enterprise models of practice</li> <li>Management of philanthropic portfolios</li> <li>Scaling of non-profit projects</li> <li>Investment in venture capital, start-ups and high-risk enterprises</li> </ul>
<b>Strategic Philanthropy</b>	Late 1990s	<ul style="list-style-type: none"> <li>Manifestation of interest by government in innovative projects</li> <li>Replication of projects</li> <li>Identification of potential recipients of donations by business researchers</li> <li>Use of metrics to monitor the impacts of donations</li> <li>Investment in private equity</li> </ul>
<b>Philanthrocapitalism</b>	Second half of the 2000s	<ul style="list-style-type: none"> <li>Attendance of return on donations</li> <li>Consumption of social investment by benefactors</li> </ul>
<b>New new philanthropy</b>	Mid 2010s	Investments in charities by edge-funds and private-equity managers

### **1.3 Empirical analysis**

This paragraph of the chapter describes how the case studies, based in Italy, were set up and how the limitations brought by the Covid-19 health crisis influenced the empirical analysis (i.e. closures of public spaces and restrictions to travel).

The paragraph also defines the methods used for the data collection that refer to network ethnography. After describing these methods, I illustrate their use in the empirical phase of the research and present two exploratory graphs of a European and Italian new philanthropic network, which have been better developed through the software called Gephi in the subsequent stages of the research. These preliminary graphs are introduced to illustrate the maps concerning social investment in European education that are developed in the third part of the research, namely in chapters 9 and 10.

### **1.3.1 Methodology**

As noted previously, the methodological approach to this thesis refers to network ethnography. The complex nature of new philanthropic networks analyzed in this study has required a methodological approach that could capture the configurations of relations between private actors promoting social investment in European education.

Specifically, the research is interested in how networks work (Ball, 2017). Moreover, the methodological approach of network ethnography is best suited to the attempt of this thesis to specify the exchanges and transitions between participants in global education policy networks, and the resources of the different actors involved (Ball, 2012a; Ball & Junemann 2012). Hence, as Junemann puts it (2017, p. 95): “while there is a constant reference to the role of money in education policy literature (both at the national level and in relation to the investment strategies from international agencies and private donors) these are usually passing reference, to illustrate a wider issue or problem, but the actual focus of such studies is not on money itself”. According to her explanation, the aim of this thesis is “to bring money to the fore”.

Given this context, the thesis has sought to bring ethnographic sensibilities to bear on the study of the global education policy networks, which has meant a direct engagement with network participants and activities, but also adaptability and flexibility (Ball, 2017). Specifically, network ethnography involves mapping, visiting, questioning and following, that is following people, conflicts and money (Junemann et al., 2015). Hence, there are different sorts of data involved in network ethnography, and a combination of techniques of data gathering and analysis (Ball, 2017).

Thus, network ethnography involves four main activities, as outlined by Ball and Junemann (2012): internet searches, interviews, field observation and graph building. First, “extensive and exhaustive internet searches around the primary actors of the studied network. Second, interviews conducted with individuals and institutions identified as highly connected, or relevant and influential. Third, participative observation of events conducted at key sites of network maintenance. Network ethnography involves, in fact, Internet visiting and meeting attending” (Ball, 2017, p. 22). Throughout the three activities, network graphs are built as tools to identify relevant individuals, institutions and relationships in relation to specific networks. In particular, the different methods carried out in the various stages of the research are introduced in the following table.

**Table 1.2 The methods used**

<b>Method</b>	<b>Data collection</b>	<b>Analysis</b>
<b>Documentary analysis of sources issued by new philanthropic organizations</b>	<p>Institutional webpages</p> <p>Institutional reports (balance sheets, financial statements, reports of meetings)</p> <p>Event programmes</p> <p>Advertisement (brochures of activities, online advertisement about the organization's projects)</p> <p>Social networks (institutional pages of the organization, posts)</p>	<p>Exploring online pages, related to vision, mission, projects, partnerships, events, discourses that are mobilized, partners, members</p> <p>Examining projects that are executed, partners involved and beneficiaries</p> <p>Understanding of connections between organizations, topics of discussion and how they are delineated</p> <p>Exploring advertisement material useful to promote the projects sponsored, both online and in presence</p> <p>Gathering a vision of the organization and connections between people and projects</p>
<b>Documentary analysis of sources issued by the European institutions</b>	<p>Communications, regulations, working papers and reports on funding for new philanthropic initiatives in education</p>	<p>Exploring policies on education governance</p> <p>Gathering data on resources for new philanthropic investments in education</p>
<b>Semi-structured interviews with the members of the new philanthropic organizations</b>	<p>32 semi-structured interviews with new philanthropic organizations' governance board members, presidents, heads of departments and staff employees</p>	<p>Collecting data about connections between people, organizations and projects</p> <p>Understanding the social context of the organizations</p>
<b>Participative observations of meetings, events, seminars, presentations provided by new philanthropic organizations</b>	<p>Observation of an after-school session for disadvantaged students held at the base of a voluntary organization in the province of Milan</p> <p>Observation of a monthly team meeting of the same organization focused on difficulties in carrying out educational activities, future projects, relationships with parents, etc.</p>	<p>Understanding of the culture of the organization</p> <p>Observing spaces and small talks between meetings</p> <p>Visualizing connections between people and organizations</p>

As noted earlier, in this study the initial method was carrying out documentary analysis. According to Ball: “network ethnography involves deep and extensive Internet searches (focused on actors, organizations, events and their connections) and attention to related social media, blogs, podcasts, Twitter, Facebook, LinkedIn and documents.” (Ball et al., 2017, p. 19). In this thesis, extensive online research was conducted about new philanthropic actors promoting social investment in education. The



documentary sources analyzed are constituted by official documents, such as articles, books, press releases, public records, financial statements, etc., and the so-called “grey literature”, made of information produced at a governmental, academic or industrial level, in electronic and paper format, not controlled by commercial publishing, for examples brochures, charts, events’ programs and survey data. Other documents consulted are those issued by the European institutions, such as communications, regulations, working papers and reports on funding for new philanthropic initiatives in social investment in education. Social networks (institutional pages of the organizations and posts) have also been accessed to better understand connections between organizations, people and projects.

The next stage concerned carrying out semi-structured interviews. Different employees of new philanthropic organizations were involved in the research: governance board members, presidents, heads of departments and staff. Interviews were recorded and fully transcribed, except for four interviews in presence. A total of 32 people were interviewed, from different types of organizations as listed in the table below.

**Table 1.3 Interviews: list of typologies of organization**

Interviews	Typology of organization
1	Academic organization
5	Association
6	Foundation
1	Network
2	NGO
2	Social cooperative
1	Social enterprise
2	Think tank
1	Voluntary organization

I conducted the interviews in two different phases: in the first, that is in the years 2018 and 2019, I searched for European new philanthropic organizations focused on social investment in education. After this first phase of exploratory interviews, in the years from 2020 and 2022 I focused on Italian new philanthropic actors, having chosen an Italian fieldwork. In both stages, I sent the selected groups an email presenting the research and requesting an interview, specifying the academic purposes of the analysis and providing a privacy statement.

The interviews were conducted using a comprehensive method. In the comprehensive approach the grid of questions is a flexible representation and a guide for the interviewer, which can be used to let people talk about the topic, and thus achieve a conversational dynamic (Kauffmann, 2011). In the comprehensive interviews I conducted, the policy actors were not asked the same questions, but the interrogations were based on online findings, especially on the projects and relationships the new philanthropic organization is involved in. Hence, as Ball (2008), puts it: “the purpose of the interviews

was to understand the history and work of these businesses, the constitution and history of their staffs, and their engagement in and with current education policy processes.” (p. 2). This “following” of people was both face-to-face through in-depth interviews with nodal actors within social investment networks in education and attendance at network and virtual events (through the Internet and social media) (Ball, 2017).

Observations were also carried out in the fieldwork. The fieldwork was conducted in Brussels and Milan between February 2018 and March 2022. So far, it has involved the observation of small meetings, and the space of the new philanthropic organizations. The visual data of the observations that I have conducted were also collected in the form of photographs and these are presented in Chapter 10.

In addition to the physical visits, I attended events virtually. For these events, I reviewed the programme and watched the videos made available online. To date, I have participated in ten online events from March 2021 to March 2022 on the role of new philanthropic actors in promoting social investment, on the implementation of the new legislation concerned with transparency and taxation regarding the third sector, on digital tools in education, etc.

Finally, in this thesis, network graphs were created while conducting internet searches and interviews, subsequently to organize the data, and then, to present it. The graphs made it possible to visualize the links within the networks, which informed the following choices on how to proceed with data collection and analysis. All data was reported in spreadsheets and translated into graphs to verify the connections. The graphs also supported the identification of what people, institutions and policies were relevant to follow. In the following sections two graphs relating to the data collected through semi-structured interviews are shown as oversimplifications of a European and an Italian social investment network in education created with the Gephi software. The maps were then enriched with new interviews and observations in the subsequent phases of the research.

### **1.3.2 Map of a European digital education network**

The first exploratory map (see Figure 1.2 below) shows the connections between new philanthropic organizations and public and private stakeholders. What emerges from the map is that four organizations have links with members of the European institutions: All Digital Associations with the Directorate General Education, Youth, Sport and Culture (DG EAC) and the Directorate General Communication Networks, Content and Technology (DG CONNECT); the Learning for Wellbeing foundation and Nesta Italia with the European Commission; the ThinkYoung think tank with members of the European Parliament; the Digital Learning Network Association with the working groups of the European Commission.

Other new philanthropic actors (Fondazione Cariplo, Fondazione Arnaldo Pomodoro and Fondazione Pirelli) have connections with Italian institutions, such as municipalities, the Bicocca University of Milan

and the Lombardy Region. Other relationships that have emerged are those with private stakeholders, such as large multinationals focused on digital technologies such as Cisco System and Microsoft.

**Figure 1.2 Exploratory map of a European social investment network**

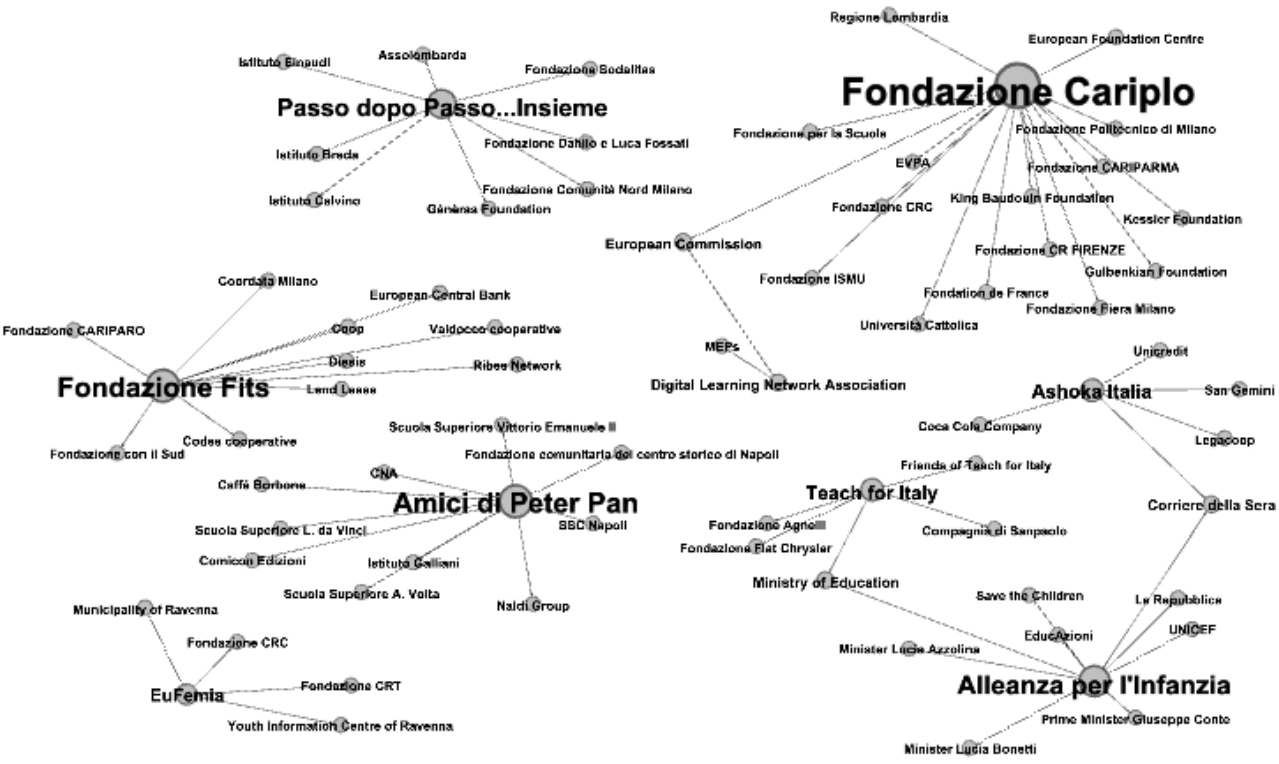


**1.3.3 Map of an Italian social investment network**

The first exploratory map of Italian new philanthropic organizations promoting social investment in education shows that four actors are involved in networks with European institutions. They are: the foundations Cariplo, Fits and Nesta Italia and the association European Digital Learning Network.

The “minor” organizations are indirectly linked to the European institutions by the four main nodes: the NGO Teach for Italy, the associations EuFemia and Amici di Peter Pan and the voluntary organization Passo dopo Passo...Insieme. Other actors that join the Italian network of social investment in education are saving banks, community foundations, social cooperatives and administrative entities.

Figure 1.3 Exploratory map of an Italian social investment network



**1.3.4 Limitations to methodology**

Since March 2020 the global pandemic crisis has slowed down the empirical analysis due to travel restrictions that have prohibited visiting the spaces of new philanthropic organizations. As a consequence, I did not conduct face-to-face interviews during this period of time.

At the beginning of the health crisis, these limitations affected the empirical analysis, but in a second phase I managed them by using digital means to conduct interviews. In fact, to reach the interlocutors, I conducted telephone and video interviews using platforms such as Skype, Zoom and Google Meet. As noted earlier, the fieldwork has also been enriched by participation in webinars, online conferences, digital events, streaming projects openings by foundations, social enterprises, voluntary organizations and associations. Finally, social networks, such as LinkedIn, have been used in order to follow new philanthropic organizations online and their connections with other public or private actors in European networks of social investment in education.

### 1.3.5 Ethics

As far as ethics are concerned, the guidelines of the University of Strasbourg have been followed<sup>1</sup>. Therefore, for the purpose of the empirical analysis, an email was addressed to the selected new philanthropic organizations introducing the study and the academic objectives of the research. Consequently, the privacy statement was sent to the organizations that responded positively, to acknowledge the interlocutors of the dissemination of the collected data for academic purposes only.

## 1.4 Italian case studies

Confirming international trends, new philanthropy is increasingly active in the governance of education in Italy. Therefore, the case studies for this thesis were the Italian new philanthropic organizations promoting social investment in education. Furthermore, Italy is characterized by “positive attitudes among teachers and students about the impact of new information and communication technologies on the improvement of learning outcomes, motivation and the development of transversal and higher-order competencies.” (Landri, 2018, p. 109). However, attitudes towards technologies in education also show diversity (some are enthusiastic, others sceptic, others indifferent, etc.), creating disparities among users facing new educational opportunities. In other words, these attitudes give rise to a digital divide, as it will be shown in the second part of the research.

Hence, an account of the implementation of digital technologies in Italian education is provided by Landri (2018) and focuses on three phases: 1) 1985-2007: from the National Plan for Informatics to the Digiscuola initiative; 2) 2007–2014: from the first National Plan Digital School to the second National Plan Digital School; 3) 2015–present: from the second National Plan Digital School of the Renzi Government.

In the first stage, from 1985 to 2007, initiatives were funded by the European structural funds in the southern regions to support school improvement. In the second stage, from 2007 to 2014, the first National Plan Digital School (Piano Nazionale Scuola Digitale) envisaged for the first time a large-scale strategy for the digitalization of schools, aiming at provoking a technological “shock” in the hope of paving the way to innovative teaching practices in Italian schools. Particularly important in this stage was the approval of the Italian Digital Agenda, an intergovernmental initiative that mirrors the European Digital Agenda. The goal was to develop policies, guidelines and ideas to foster the digitalization of the economy and society.

In the third stage, which started in 2015, the strategy of development and consolidation of the digital school was relaunched by two among the most recent policies on digitalization in Italian education (Forciniti, et al., 2019): the reform “La Buona Scuola” of the Renzi Government and the new National Plan Digital School. The reform aims at guiding schools in a path towards digitalization, so that technologies can allow for less transmissive and more operational teaching method. The vision of the

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<sup>1</sup> <https://www.unistra.fr/ethique-recherche>

National Plan Digital School undertakes a sensitive path towards the development and implementation of a perspective on education in the digital age, where ‘technologies become enabled’ in a complex process of restructuring the ecology of school practice. Overall, the National Plan Digital School of the Renzi Government outlines the conditions for education in the digital era by giving a framework for the governance of opportunities offered by new digital technologies (Landri, 2018). Table 1.4 summarizes the different laws reforming the Italian educational system towards digitalization.

**Table 1.4 Italian laws for the implementation of digital technologies in education**

<b>Law</b>	<b>Year of implementation</b>	<b>Objectives</b>
<b>National Plan for Informatics</b>	1985	Improving scientific skills of students Providing skills in programming and computer systems Supporting the teaching of mathematics with computer tools
<b>DigiScuola</b>	2007	Developing and involving digital contents in teaching and learning processes
<b>First National Plan Digital School</b>	2007	Improving learning environments and promoting digital innovation in education
<b>Second National Plan Digital School</b>	2015	Implementing an overall strategy of innovation of the Italian school Encouraging collaboration between the Ministry of Education, governmental offices, regions and local entities to achieve innovation and digitalization in education Personalizing learning based on student needs Researching in education Slowing down school dropouts by increasing motivation Introducing interactive teaching tools to facilitate the learning process

Furthermore, in recent years, in southern European countries, such as Italy, the issue of poverty has been linked to a resurgence of educational inequalities. In this study, I refer to educational poverty as the deprivation by children and adolescents of the opportunity to learn, experimenting, developing and letting their skills, talents and aspirations flourish freely. Educational poverty also concerns the

limitations in the opportunity to grow emotionally, in the relationships with others, and in discovering oneself and the world (Save the Children, 2017).

In order to counter the spread of educational poverty, the Fund for the contrast of educational poverty of minors (Fondo per il contrasto alla povertà educativa minorile) was implemented in Italy on the impulse of the Association of Italian Foundations and Saving Banks (ACRI, Associazione di Fondazioni e di Casse di Risparmio Italiane Spa) in 2016. It represents an attempt to systematize public and private resources to be allocated to education and a replicable model for future collaborations between public and private organizations in the field of education. As part of this initiative, ACRI has increased the opportunities for access to qualified educational processes to be offered to disadvantaged minors.

As regards new philanthropic organizations, in 2016, the Reform of the Third Sector (Riforma del terzo settore) and the Single Register of the Third Sector (Registro Unico del Terzo Settore), respectively the reform and the mandatory register of the non-profit sector, officially recognized the new philanthropic actors. These measures require the Italian new philanthropic organizations to express in their statutes, among other principle, those on asset management, fundraising and destination of the money spent. The Reform of the Third Sector has also regulated, for the first time in Italy, the opportunity for the third sector organizations to unleash their potential as non-profit productive enterprises extending the scope of entrepreneurial initiatives to services of general interest and stimulating business logics of social impact. Italian new philanthropic organizations today therefore include: voluntary organizations, social promotion associations, philanthropic entities, social enterprises (including social cooperatives), associative networks, mutual aid bodies and foundations. A table concerning Italian new philanthropic organizations and their activities is provided below.

**Table 1.5 Italian new philanthropic organizations**

<b>Type of new philanthropic organizations</b>	<b>Areas of activities</b>
<b>Voluntary organizations (Odv)</b>	Entities aimed at carrying out activities of general interest in favour of third parties, through the voluntary work of their members. They were introduced into the Italian legal system by Law 266/1991
<b>Social promotion associations (Aps)</b>	Category of third sector entities established in associative form, which carry out activities of general interest for the benefit of their members, their family members or third parties
<b>Philanthropic organizations</b>	Type of third sector bodies that can take the form of a recognized association or foundation, with the aim of providing money, goods or services, including investments, to support disadvantaged people or activities of general interest. Their legal personality constraint is linked to the obligation to own a certain amount of assets
<b>Social enterprises (including social cooperatives)</b>	Private entities that carry out in a stable and prevalent manner a business activity of general interest for civic, solidarity and social utility purposes
<b>Associative networks</b>	Type of third sector bodies, established in an associative form, which carry out coordination, protection, representation, promotion or support activities of the associated new philanthropic organizations to promote their representativeness among institutional subjects
<b>Mutual aid organizations</b>	Non-profit organizations that pursue objectives of general interest through the exclusive provision of services for the benefit of partners and their family members
<b>Foundations</b>	Entities with private legal personality governed by the Civil Code owners of assets intended for a specific and legitimate purpose of social utility



## 1.5 Conclusion

The first chapter explored the research focus of the thesis, which is on social investment in European education, through the presentation of the research question and the objectives and hypotheses of the study.

To verify the first hypothesis, which concerns the possibility for new philanthropic organizations to promote social investment in European education through the digital education networks in which they are involved, I have drawn on the literature focused on network governance, exploring the relationships inside global education networks focused on solving “wicked” social problems addressed to new policy actors taking part into these heterarchical networks.

The second hypothesis of the research was also introduced which, as mentioned previously, refers to the promotion of advocacy instances for social inclusion in education by new philanthropic actors through the mobilization of their financial resources. To address this hypothesis, theories on new philanthropy were mobilized, along with a comparison of recent trends in new philanthropic investments and oriented towards the adoption of commercial and enterprise models based on the “return” on donations.

Finally, the history of the implementation of digital technologies in Italian education was provided together with a classification of Italian new philanthropic organizations to anticipate some salient points related to the context of Italian education governance networks, which constitutes this research fieldwork. Furthermore, a discussion was started on the methods used for the empirical analysis focused on the network ethnography of Italian case studies. Thus, to understand how new philanthropic organizations operate in education governance, it was necessary to follow the “whos”, “whats”, “wheres” and “hows” of policy, utilizing network ethnography, which is discussed in the next chapter.

## Chapter 2

### **Following social investment policies in European education through network ethnography**

After introducing the thesis, this second chapter will analyze a methodology for studying social investment strategies in European education. The methodology used in this research is that of network ethnography, which involves close attention to organizations and actors, and their relations, activities and histories, in the global education policy field, to the connections that join-up these actors, and to “situations” in which policy knowledge is mobilized.

In this study, I also explored the aforementioned interdependences and mobilities, focusing on the growing role of business and philanthropy in education policy work, deploying the network trope of a global policy as an analytical and representational device. This involves both a mapping and representation of the “global education policy field” (Lingard & Rawolle 2011).

In the first paragraph of the chapter, I present the concept of network, intended as a descriptive tool to analyze the forms of governance that interlink markets and heterarchies in European education and represent social relations within policy in the field. The paragraph also describes the method of network ethnography, which includes mapping, visiting, questioning and following (Marcus, 1995). Therefore, I introduce the attempt to follow people, “things” and money in the field of social investment in European education, in order to highlight exchanges between new philanthropic organizations in global policy networks and the roles, discourses and resources mobilized by these actors.

In the second paragraph, the methodological approach is exposed. A qualitative method case study using a network ethnography is described that pays particular attention to dynamics of social investment in European education. I describe the already mentioned activities involved in network ethnography: internet searches, interviews, field observation and graph building (Ball & Junemann, 2012). Different exploratory graphs related to data collected through interviews with employees of new philanthropic organizations involved in social investment strategies in European education are also presented.

In the last paragraph, I introduce the concrete design of the study conducted in which specific attention is devoted to the descriptions of the characteristics of the networks involved in the inquiry. Issues such as case study selection and fieldwork construction are discussed throughout the paragraph. Finally, the limitations of the methodological approach encountered during the empirical investigation are illustrated.

## **2.1 Researching networks of social investment in education**

The next sections provide an overview of the methodology used for the network analysis. Specifically, the methodology introduced in this study aims to recognize meanings and ideas from social investment strategies in European education implemented by new philanthropic organizations.

The methodological approach of the research was also designed to allow for understanding the interrelations between the different actors involved in social investment strategies in European education and the policy networks dynamics in which they are involved. Finally, in order to search for these links, new Internet tools are introduced, such as social networks, used to publicize partnerships and new projects carried out by new philanthropic organizations.

### **2.1.1 Network ethnography**

The study adopted an ethnographic approach to data collection and produced an ethnography in terms of presenting a detailed description of new philanthropic organizations implementing social investment strategies in European education and networks in which they are involved.

There is a degree of misleading clarity about the concept of networks, as illustrated in the governance literature. It is used abstractly to describe changes in the form of government or employed to refer to a wide variety of practical social relationships. Here, the idea of networks is used as a descriptive and analytic term, to refer to a form of governance that interrelates markets and hierarchies. It also indicates a method, a means for tracing and representing social relations within the field of policy (Ball, 2008). Moreover, according to Verger et al. (2017):

“Networks are sets of relationships between political, social and/or economic actors, which work as channels of influence and, on many cases, as more or less formal governance mechanisms.” (p. 327).

Policy networks are a set of interconnected policy spaces that are both virtual and real, formal and informal, ideological and social. They create a set of interactions, interdependencies and exchanges that do governing work, and are constituted through structures and flows, spaces and places (Ball et al. 2017, p. 18). Specifically, as explained in the previous chapter, I focus on a set of network relations, that constitute “policy communities”, which “catalyse” business in the delivery of education services and reconfigure education policy discourses. Thus, in this thesis, I map, explore and analyze the structure, dynamics and evolution of education policy communities, identified as sets of organizations, people and events that are joined up in different ways, in relation to a global project of education reform (Ball et al., 2017).

Therefore, network ethnography is an assemblage of research tactics and techniques that addresses both the organization and processes of network relations (Avelar & Ball, 2017). According to Ball (2016), it is a developing method of research that engages with new policy topography and involves mapping,

visiting and questioning and following policy (Marcus 1995). That is, following people, “things” (blended learning, assessment), stories, lives and conflicts and “money” (Junemann et al., 2016). Thus, the network examples which are discussed in this thesis (see chapters 9 and 10) are simplified for presentation, to highlight particular people and organizations, which are inter-connected in a variety of ways in policy networks (Ball & Junemann, 2011).

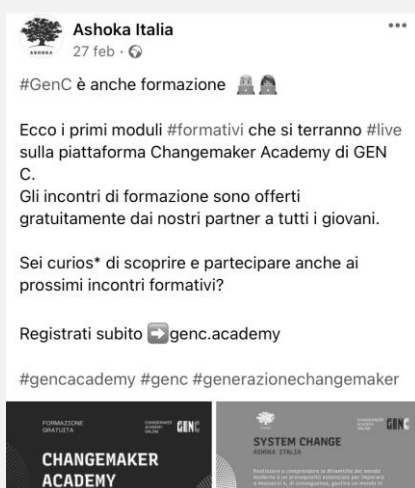
Therefore, network ethnography is an appropriate and responsive method that engages with networks (Avelar & Ball, 2019). However, little of the potential of the Internet either as a research site or as a research tool has been utilized in education policy research. According to Ball et al. (2017):

“There is a large body of material available (newsletters, press releases, videos, podcasts, interviews, speeches and web pages, as well as social media such as Facebook, Twitter, LinkedIn and blogs) that can be identified and analyzed as data in policy research.” (p. 20).

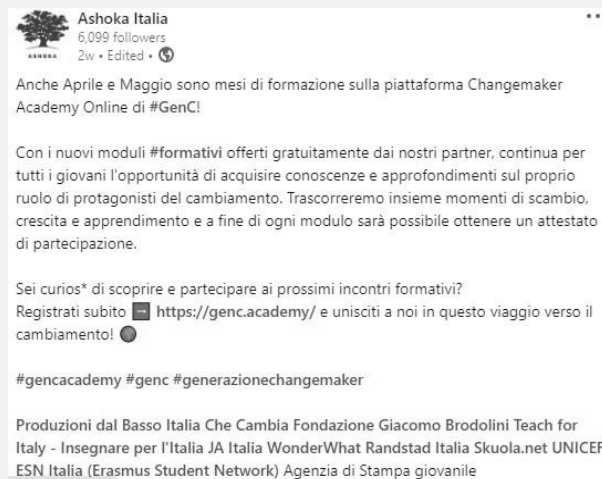
### Box 2.1 Ashoka Italia promoting educational activities on Facebook and LinkedIn

The NGO Ashoka Italia has the main goal of achieving positive change in society by building a community of “young changemakers”, able to address the root causes of problems with a long-term perspective and thus bringing about a systemic transformation.

Ashoka Italia works on these themes implementing educational projects promoted online through social networks, such as Facebook and LinkedIn. In particular, through the partnership with the online Academy Gen-C, Ashoka Italia is providing a “Changemaker Academy Online”, which consists of free training on different issues connected to social change, such as community empowerment and engagement, sustainability, system transformation, youth participation and co-leadership. Two examples of the related online posts on Facebook and LinkedIn are provided below.



Facebook post



LinkedIn post

In this landscape, network research settings are multiple, fluid and evolving, and also largely virtual. Therefore, in this thesis “following” is both face-to-face through in-depth interviews with nodal actors within the network and attendance at network events and virtual, through the Internet and social media (Junemann et al., 2018). Here Informality and casualness tend to be intrinsic features in the way policy networks operate. Hence, networks appear to be sustained through social and personal relationships, conversations, face-to-face meetings, social events, discussions, consultations, and so on (Verger et al., 2016).

Moreover, as stated by Selwyn (2013, p. 1) today there is a “reduction in the physical restrictions and ‘frictions’ of the ‘real’ world. Indeed, in the latter years of the twentieth century, there was much talk of a technology-led ‘time-space compression’, ‘end of geography’ and privileging of “virtual’ arrangements over material arrangements.” Thus, I examine these materials and highlight that:

“they have the potential to illuminate the extent of influence of new kinds of actors, including donors, policy entrepreneurs and various brokers, on policy processes, and the identification of new spaces of policy and conduits (both virtual and face-to-face) for policy ideas and discourses and crucially, relations and interactions between actors.” (Junemann et al., 2018, p. 459).

Finally, according to Junemann et al., (2016) building on previous work on policy networks and the analysis of global policy communities, in this thesis I want to think further about how global policy networks work, focusing on network relationships or more generally connectivity, that is, on what connects the nodes in a policy network and what is connected. Therefore, I am interested in understanding, first, what is the substantive tissue that both joins up and provides some durability to these forms of social interaction in a socioeconomic sense. Second, I want to think about network building or in other words the “work of networking”.

### **2.1.2 Following people, things and money**

“Network ethnography involves close attention to organisations and actors within the global education policy field, to the chains, paths and connections that join up these actors, and to ‘situations’ and events in which policy ideas and methods are mobilised and assembled.” (Ball et al., 2017, p. 19). All of this means “staying ‘close to practice’” and “‘tracing’ of the travels” of policy actors (McCann and Ward, 2012 p. 45). Hence, in this thesis, network ethnography is intended as:

“a hybrid mix of different tools and techniques - a hybrid of cyber ethnography, multisited ethnography and traditional ethnography. It involves Internet searching, network mapping, in-depth interviewing, event visiting and meeting attending – observing, taking field notes, and networking or building relationships in the field. [...] In accommodating to the object of study, it is essentially hybrid and responsive.” (Ball et al., 2017, p. 22).

Network ethnography also mirrors the hybridities and blurrings (Ball & Junemann, 2012) that characterize global policy networks. In an attempt to follow people, that is the “whos” of policy, in this thesis, the key relationships in the new philanthropic networks have been outlined in a series of interviews conducted with figures of different geographical extent from different types of organizations. I focused on 21 new philanthropic entities occupying nodal points within the European and Italian education social investment contexts and then examined some of their network relations and network activities, and documented some of the work they do in the “re-contextualisation of new modes of governance” (Ball, 2016, p. 11).

These organizations are each in different ways “boundary spanners”, that is, the focus of connections between sectors and communities (business, government, philanthropy). They join up different theatres (state, market and civil society), move ideas between them, and participate in and initiate policy conversations, establishing effective social relations. They are also solution providers (Ball & Junemann, 2012).

Moreover, as stated by Ball et al. (2017), these actors are constantly on the move locally and globally, attending events with potential sponsors, business partners and potential policy recipients. They join up in person distant points within the global education policy community. They are brokers, policy entrepreneurs and socially constructed “experts”. All of this ensures that they are taken seriously and that they are listened to, that they can speak to the “right” people and be in the “right” place to participate in the forging and forming of policy common sense. Furthermore, through the empirical investigation, I noted new players entering the global education policy community, such as specialized equity investors and advisors, as well as impact funds, accelerators and incubators. These new players are increasingly active not only in relation to education policy, but also inside the policy process, reworking the definition of policy problems and establishing authoritative “solutions” (Junemann, 2015).

The study also aims to identify what “passes” through networks, that is artefacts, techniques, and technologies that move through these network relations. This means analyzing the “whats” of policy, gaining credibility, support and funding as they move, mutating and adapting to local conditions at the same time (Ball et al. 2017). Thus, in this research, I follow “things”, the material objects that are incorporated within wider policy networks and circulate through them, considering wider “technologies”. “That is, the articulated set of instruments, techniques and procedures in place that, although they incorporate material objects, cannot be reduced to them” (Ball et al., 2017, p. 72).

Thus, the “things” I follow in this thesis “are part of a growing attention towards Ed-Tech, as a major site of business opportunities.” (Ball et al., 2017, p. 73). Here I look at company mergers, grant allocation decisions, philanthropic commitments and partnerships in order to understand how this “thing” moves across a tight network of powerful organizations, alternating between profit and aid. In this case, then, it is not so much the “thing” that moves from one location to another, but real companies that are drawn to one location by the opportunity to capture their share of an immense and growing market sector with the aid of technology. In this case, the movement of the “thing” is between companies and organizations, taking different forms as it moves (impact and venture capital investment, international development,

etc.). Hence, with digitalization, datafication and the technical devices of digital governance, my attention goes “to the minor tactics of governing that unfold across these relations” (Peruzzo et al., 2022, p. 4).

Finally, in order to track the movement of money of these Ed-Tech companies, my approach is to “progressively ‘zoom in’ to view the movement of money in greater detail.” (Ball et al., 2017, p. 95). By this sequence of approximations to investment in education, the study aims to dive into the micropolitics of venture capital in education.

### **2.1.3 Mobile policies involving new philanthropic organizations**

This research aims to “attempt some resolution between network analysis – and its emphasis on structural relations – and the analysis of policy mobilities” (Ball, 2016, p. 2). In the thesis I also consider some of the methodological consequences of studying the chains, circuits, networks, webs, and translations in and through which policy and its associated discourses and ideologies are made mobile (McCann & Ward, 2012). Hence, nowadays, there is the need to move away from a structured and static community analysis to an attempt to understand mobility, and the practices and mechanisms involved in the flows of policy. Indeed, as Junemann et al. (2015) argue, they are both forms of socio-economic relationship involving exchange, and epistemic-discursive communities joining up multiple, distant “sites” through fluid and evolving forms of financial, discursive, political, technological and social exchanges. Thus, the term “policy mobility” (Peck & Theodore, 2010) refers to policies as re-assembled in particular ways, in particular places and for particular purposes (McCann & Ward, 2012).

Policy mobility also involves the establishment of connections between policy actors and policy-making sites and will often be associated with the anointment of favoured “models”, involving the enrolment of advocates and followers and the consolidation of norms and paradigms. In this scenario:

“policy actors are not conceptualized as lone learners, but as embodied members of epistemic, expert, and practice communities. They are sociologically complex actors, located in (shifting) organizational and political fields, whose identities and professional trajectories are often bound up with the policy positions and fixes that they espouse. And rarely do they act alone. Instead, they operate in fields of practice that are heavily intermediated, not least by a range of interests in the policy transfer “business”, such as consultants, advocates, evaluators, gurus, and critics.” (Peck & Theodore, 2010, p. 170).

In relation to education policy, these re-assemblies may have convergent consequences in terms of modes of governance and global forms and conceptions of policy that require to think both about how the “global” impacts on the “national”, while acknowledging, at the same time, the extent to which the national is critical in the formation of global policy agendas. However, this study escapes from the global and local as a binary distinction and emphasizes the interdependency of actors and the movement of ideas in the framing of problems and policy directions and conceptions (Grek & Ozga 2010). All of this

means attending to multiple sites and spaces of policy within and between states and the relations between them (Ball, 2016).

Thus, through the work of networks, policy is being moved. To understand how this is achieved it is important to attend to the relationships and exchanges that make up network activity and evolution, focusing on the labour of network actors. Indeed, “networks are not just a set of connections between sites but are also a history of on-going effort, and are animated by social relations and performance.” (Ball, 2016, p. 2). Policies are made up of “embodied geographies” and their analysis address the ways in which ideas travel and orthodoxies become consolidated. Moreover, as Ball (2019) argues:

“New kinds of careers, identities, and human mobilities are forged within these processes of education policy and education reform. At the same time as policies move, and as new sites, new possibilities, and sensibilities are established, policy is “talked” and thought and enacted differently, and within new limits. Here the space of policy analysis is not defined by geographical entities, but by the space configured through the labor of policy actors at the intersection of global and situated elements. Global, regional, national, state and city, local and institutional levels of policy intersect and diverge.” (Ball, p. 83).

The flows and spaces that link local with global dimension, give substance to the concept of “scapes” (Appadurai, 1996), a new global cultural economy, which involves interactions of a new order and intensity, and to new topologies of policy (Lingard and Sellar, 2014). Finally, the policy space “is configured through the intersection of global and situated elements” (Ong, 2007, p. 5), which are new intersectional agents and spaces of policy, establishing interactive relationships with local actors and reconfiguring the processes of policy (Ball, 2016).

## **2.2 Methodology**

In this thesis, I deployed a methodology that could be compatible with the empirical analysis performed during the study. The methodology adopted was ethnographic.

In the second paragraph of this chapter, I introduce the methodological point of view of the data analysis, which is based on topological visualizations of networks of social investment strategies in education. Hence, in order to deepen the ethnographic approach adopted, and after having illustrated it in the previous paragraph, in the next sections I present in detail the methodological tools used in this research: documental analysis, comprehensive interviews and network graph building.

### **2.2.1 Ethnographic approach**

In order to analyze the composition of social investment strategies in European education, a methodological design was developed that would allow me to follow the different actors populating these



strategies. To explore how networks of education governance operate in practice and to illustrate the concomitant processes of the “heterarchicalisation” of the state (Avelar & Ball, 2017), in this thesis I focus on one specific case study for each research objective.

As explained in the previous paragraph, in this empirical investigation I outline the method of network ethnography, discussing its appropriateness as a research method for the study of the functioning of global policy networks. I then “put the method to work” (Ball et al., 2017, p. 15), by providing empirical examples of such networks (see chapters 9 and 10). Moreover, in the empirical analysis, the ethnographic approach was used as an in-depth qualitative study in the particular dynamics of social investment in European education, paying particular attention to advocacy practices. In addition, in network ethnography, there are various overlapping benefits of case studies, such as the collection of data from a realistic context and the ability to use qualitative methods that have been helpful in gathering a wide range of information for complex and long-standing programmes (Ball et al., 2017).

As noted in the first chapter, I interviewed 32 employees with different roles in new philanthropic organizations about their company's work, partnerships, strategies of social investment, funding mechanisms, etc. The interviewer's role was to ask questions that retrieved as many details as possible about the actors (academic and professional background, role in the organization, participation into projects, etc.) and the interactions between these actors (relations with employees of other new philanthropic organizations, participation in shared projects or consultations, etc. ). Having transcribed each interview (duration: 1 hour) verbatim, the transcripts were considered as strategic accounts of social investment strategies in European education, focusing on the actors and interactions that compose these strategies (see chapters 9 and 10 for detailed processing). Hence, ethnographic approaches also address contexts, which were important for this study where actor-oriented processes of social investment in European education were being explored within the European and Italian policy background in the field.

Finally, two types of data were used to identify the networks discussed in the third part of this thesis: a series of detailed and extensive searches on the Internet focused on the involvement of these actors in educational policies; a series of interviews with senior figures in the educational services industry. These two types of data are examined in the next sections.

### **2.2.2 Documental analysis: online searches**

In the first phase of the empirical analysis, extensive online research was conducted on new philanthropic organizations investing in the European education sector. The documentary sources that I have examined are official documents, such as articles, books, press releases, public records, financial statements, etc., and the so-called “grey literature” composed of information issued at the governmental, academic or industrial level, in electronic and printed formats not controlled by commercial publishing, such as brochures, charts, event programmes, survey data. Other documents consulted are those

provided by the European institutions, such as communications, recommendations, working papers, reports provided by the European Commission staff, contributions to consultations, etc.

Initially, exploratory search was conducted looking for relationships among actors. Once a central organization was identified, this node was followed in an attempt to collect more data on it. Indeed, when visiting the webpages, I tried to comprehend the organization (mission, key members, partners), to highlight the connections between the actors. Thus, it is possible to identify nodal organizations by seeing them repeated in different networks and projects. This is also useful to distinguish nodes that are involved in “smaller” networks, and that work together on specific initiatives, following certain strategies, mobilizing human and financial resources.

The online data collection started by the Lifelong Learning Platform, an umbrella website collecting 42 European organizations active in the field of education. The analysis of the members of this organization allowed me to identify relevant new philanthropic actors active in the field of social investment in European education and to build the exploratory graphs related to these actors. Examples of these maps are displayed below and visualize the first connections that were exposed.

**Figure 2.1 Exploratory network graph depicting one organization and its connections**

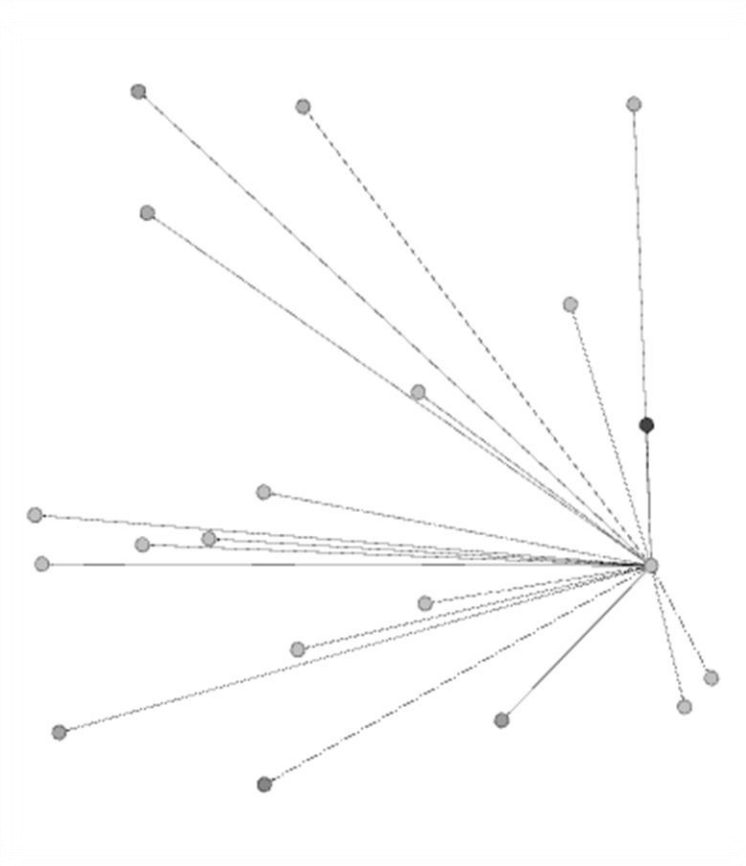


Figure 2.2 Exploratory network graph depicting two organizations and their connections

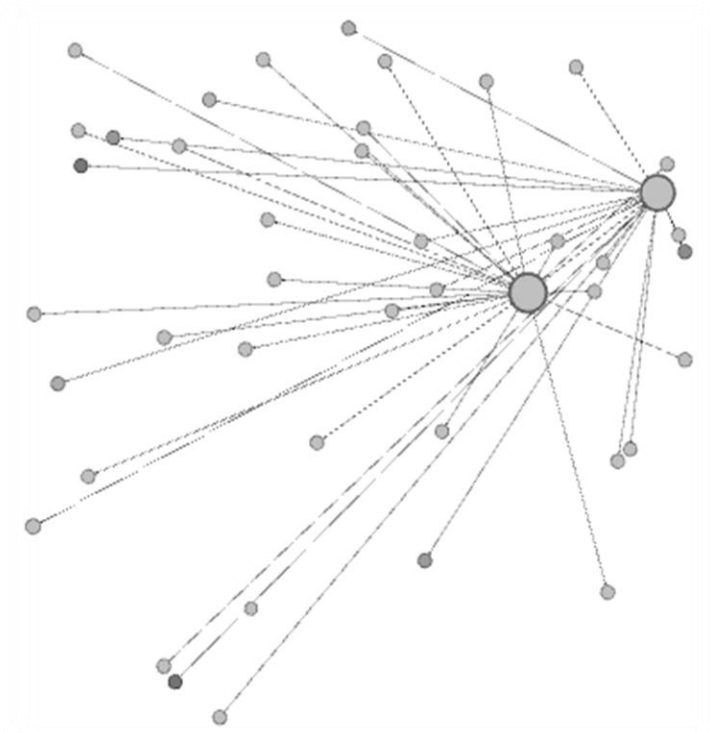
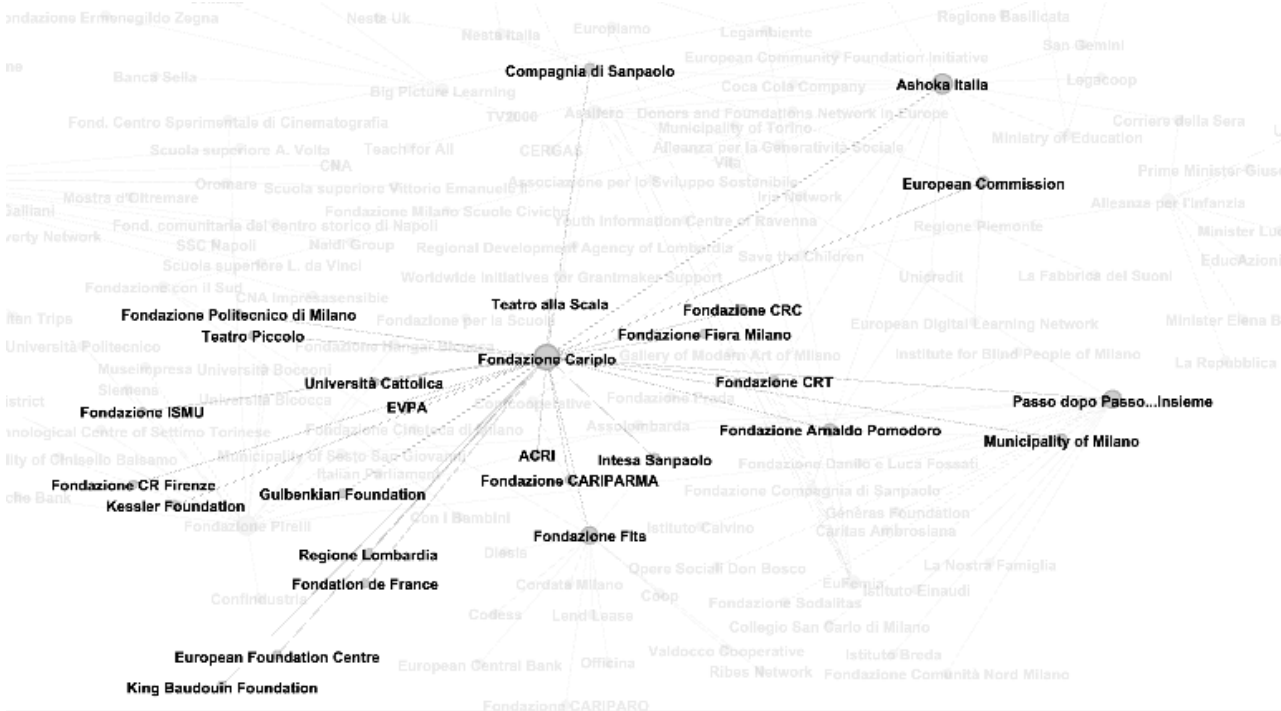


Figure 2.3 Exploratory network graph depicting the network of Fondazione Cariplo



The online data sources I reviewed are categorized here according to their function in data analysis. They are therefore divided into webpages of organizations, institutional reports, event programs, advertising and social network documents. Each type of documentary source was used with a particular purpose during the different phases of the empirical analysis, as introduced in Table 2.1.

**Table 2.1 Online searches**

Types of online data sources	Data analysis
<b>Official webpages of new philanthropic organizations</b>	The website analysis involved exploring online pages of mission, projects, members and partners
<b>Official reports (balance sheets, financial statements, reports of meetings)</b>	The screening of the reports enabled the understanding of the projects carried out, resources mobilized, partners and beneficiaries involved in the projects
<b>Event programmes (presentations of projects, conferences, webinars)</b>	Event programmes were relevant to identify connections between organizations, actors and topics of discussion
<b>Advertisement (brochures of activities, online advertisement about the organization's projects)</b>	Advertisement material was useful for learning about the projects and activities promoted, both online and in presence
<b>Social networks (institutional pages of the organizations, posts)</b>	The analysis of social networks deepened the understanding of the institution's vision and connections between organizations, people and projects

### 2.2.3 Comprehensive interviews

This study has sought to bring ethnographic sensibilities to bear on the study of these networks, which has meant a direct engagement with networks participants and activities but also an appropriate flexibility and adaptability. Networks are, in fact, “social and human constructions, and while networks are both structural and causal, we need to understand how actors interpret these structures.” (Ball et al., 2017, p. 16).

As noted in the previous chapter, I conducted interviews in two different phases: in the first one, that is in the years 2018 and 2019, I selected European new philanthropic organizations focused on social investment strategies in education by examining umbrella websites, such as the Lifelong Learning Platform. I have emailed selected organizations to present the academic goal of the investigation and

also sent them an email containing a privacy statement, specifying that I will not disclose the collected data for any purpose other than academic ones.

In the first phase of the network ethnography, I interviewed employees of 6 European new philanthropic organizations. After this first phase, from 2020 to 2022 I focused on the Italian new philanthropic organizations in the educational field. I searched for organizations in the online database of Italia non profit<sup>2</sup> ([www.italianonprofit.it](http://www.italianonprofit.it)) selecting those focused on social investments in education. As I did for the European new philanthropic organizations, I sent the selected Italian actors an email presenting the research and requesting an interview, specifying the academic purposes of the analysis and providing a privacy statement. Thus, I conducted semi-structured interviews, which allowed me to characterize the new philanthropic organizations with respect to their relationships, financial and human resources mobilized and projects implemented.

**Table 2.2. List of interviewees**

Interviewees	Organization
1	Aalto University
1	All Digital Association
1	Alleanza per l'Infanzia
1	Amici di Peter Pan
1	Ashoka Italia
2	Assifero
4	Big Picture Learning
1	EuFemia
1	European Digital Learning Network
2	Fondazione Arnaldo Pomodoro
3	Fondazione Cariplo
1	Fondazione Fits
2	Fondazione Pirelli
1	Con i Bambini
1	La Fabbrica dei Suoni
1	Learning for Well-being
1	Nesta Italia
4	Passo Dopo Passo...Insieme
1	Teach for Italy
1	ThinkYoung
1	Yerun

<sup>2</sup> Italia non profit is a platform that aims to bring institutions, professionals, donors and companies into contact with non-profit organizations.

The interviews were conducted using a comprehensive method. The comprehensive approach is based on the idea that the interviewees are not simple agents representing structures, but also active producers of the social. In the comprehensive interview, the interviewer maintains a discrete role, while the role of the interviewee who actively listens to the questions must prevail.

Hence, according to Ball (1990), qualitative research shares the principles of ethnography as a tradition engaged in the search for subjectivity and meaning, a suspension of preconceptions and an orientation to discovery. Furthermore, "the method is appropriate inasmuch as it is flexible, evolving and adaptive in bringing ethnographic sensibilities to bear to the portrayal and analysis of the complex, translocal, evolving and multimedia relations that constitute global policy networks." (Ball et al., 2017, p. 19). Thus, it is important to "bring together structural, macro-level analysis of educational systems and education policies and micro level investigation, especially that which takes account of people's perception and experiences" (Ozga, 1990, p.359).

Therefore, within the comprehensive approach I have used to conduct semi-structured interviews, the grid of questions is a flexible representation and a guide for the interviewer, suitable to get the topic talked about, trying to obtain a conversation dynamic richer than the simple answers to the questions, always remaining within the intended theme. Furthermore, as stated by Kauffman (2011), in comprehensive interviews the grid of questions is a "soft guide": once articulated, it is unlikely to read it and ask the questions in sequence, even if they must be presented in a logical and coherent way.

The grid of questions should be constructed like a scientific object: "working on coherence, strengthening what is central, controlling what is peripheral, removing without any weakness what is redundant" (Kaufmann, 2011, p. 45). Hence, while conducting interviews, respondents were not asked the same questions, but the interrogations were based on online findings, with particular reference to social investment strategies in education and the network relationships in which the new philanthropic organizations are involved. Thus, online searches were instrumental in creating relevant questions. In addition, during the interviews relevant topics emerged, such as access to funding or participation to national or European calls for grants. Sometimes these topics have become the subject of subsequent interviews with the same employee. The grid of questions to guide the interviews is presented in Box 2.2.

### **Box 2.2 Grid of questions for semi-structured interviews**

#### **Academic background and skills**

Academic and professional experience, role in the organization, specific skills, areas of expertise

#### **Characteristics of the organization**

Origin, dimension, mission, activities, reputation, daily and mid-term activities, internal decision-making, internal and external relations

#### **Specialization of the organization**

Vision, values, policy area of reference

#### **Internal organization**

Organizational model, leadership characteristics and staff roles

#### **External relations**

Audience (general public and policy-makers), networking activities, media strategies

#### **Successful projects**

Examples of successful projects, description of the strategy of success, measurement of outcomes

#### **Relationships with European and national institutions**

Staff dealing with institutional relationships, activities, frequency of contacts with the institutions, outcomes, types of advice provided

#### **Funding**

Application procedure for tenders, funding for specific projects, main funders, partners in fundraising requests

### **2.2.4 Network graph building**

Network graphs were built during the different phases of the research. After the first online searches on European new philanthropic organizations involved in social investment strategies in education, I was able to create spreadsheets that helped me to keep track of the relevant actors that emerged during the

online data collection. I have progressively enriched these databases with the data gathered through the interviews and concerning the relationships of the new philanthropic organizations analyzed with other relevant actors. Furthermore, I used these spreadsheets as the databases for the construction of the graphs through the map visualization software Gephi.

The graphs provided in this study offer a preliminary visual analysis “of some examples of new communities which have been formed around education policy, and consider some of the ‘work’ they do in bringing about changes in policy and changes in governance” (Ball, 2008, p. 748). However, next to meaning I am interested in the pattern of ties and structure (clustering, density and connectivity) and explore some of these characteristics of networks (Ball et al., 2017), which I will address in the third part of the thesis.

In this research, I use data both to map global education policy networks, and as the basis for an analysis of the dynamics and work of the network. Networks, in fact, are studied “not just as sets of nodes, but as a set of connections between certain nodes.” (Ball et al., 2017, p. 21). Indeed, “there are two relevant elements in the networks analyzed, the ‘nodes’ (which can be individuals, organisations, or even subject positions) and the ‘ties’, which are the links between them.” (Ball et al. 2017, p. 71). Therefore, the starting point of the interactions in social investment strategies in education introduced in this thesis is a configuration presented in the form of topological visualizations. Furthermore, to focus on the topology, the composition of such strategies will be visually analyzed along three dimensions of the networks: centers, boundaries and margins. The implications of these three profiles of social investment strategies in education will also be accompanied by the descriptions of their distributions within each map.

Based on the visual analysis of each map along these dimensions, I was able display different graphs of social investment networks in education shown in chapters 9 and 10. Here, the graphs are a simplified representation of complex and rapidly evolving network relations (Ball & Junemann, 2012). Where illustrative, quotations of the interviews were also used to supplement the analysis. Moreover, in the data analysis process, I followed the interview transcripts without making any further explanatory additions. Hence, the visualization process began with studying each interview transcript to identify the different actors and their relationships within European networks of social investment in education.

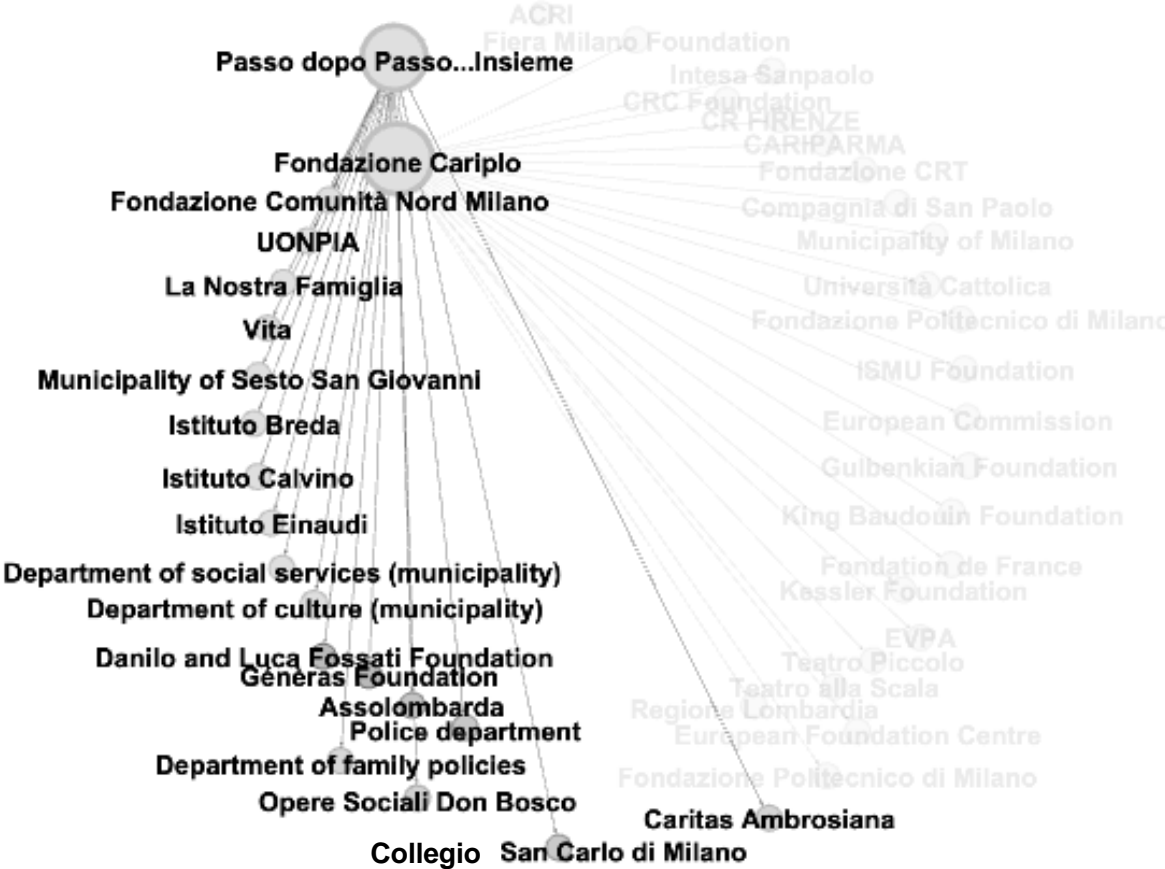
Then, I displayed the successive networks of actors and relationships through graphs. Each graph consists of nodes showing organizations and edges showing relationships between organizations. The shape of each network was obtained by using the Force Atlas algorithm of the Gephi visualization software. This algorithm spatializes a network of nodes and connections based on the attraction of connected nodes and the repulsion of unconnected nodes positioned in peripheral areas in a map.

In the graphs I constructed, attention was paid to the dynamics of social investment in education in terms of groups of organizations and their relationships. These visualized groups are, therefore, derived from the intensity of their interactions. That is, instead of viewing social investment strategies as a given set of activities, Gephi visualizations allow examining the composition of social investment practices in education by distinguishing groups of actors, based on the intensity of their relationships.



Also, once all the nodes and edges were entered into the database, I focused on different aspects of each graph by manipulating different parameters: size of nodes (nodes with more connections are bigger than the others), different colours of nodes depending on the type of organization (foundation, association, cooperative, school, business organization, etc.), different emerging groups connected to the central nodes through boundary actors. Overall, this data visualization process has resulted in various maps of social investment dynamics in European education, each map with its own distinct characteristics, which are displayed in chapters 9 and 10. Finally, the network examples presented and discussed are necessarily simplified for presentation, to highlight particular people and organizations in a variety of ways (Ball & Junemann, 2011).

**Figure 2.4 Preliminary graph on the relationships between new philanthropic organizations (Gephi Circular Layout algorithm)**



**Figure 2.5 Preliminary graph on the relationships between new philanthropic organizations (Gephi Force Atlas algorithm)**



## 2.3 Case study approach

In the following sections, a qualitative method based on a case study approach (one case study for each research objective) using network ethnography is introduced. The presentation of the two case studies analyzed in this thesis will be then deepened in the empirical chapters 9 and 10.

In the paragraph, I explain as network ethnography was appropriate for a case study of social investment strategies in European education implemented by new philanthropic organizations in networks involving advocacy processes, since enough data could be collected from the single case.

### 2.3.1 Case study selection

As anticipated above, this study attempted to research the social investment strategies in European education adopted by new philanthropic organizations using a network ethnography framework and a single case study methodology to explore each research objective. In the empirical investigation, there was no rationale to add other cases, and multiple cases would have generated too much data for the scope of the study. While this meant that some of the richness of descriptions of further organizations were lost, it enabled a more concentrated focus on describing the governance networks of the selected case study.

Therefore, more detailed descriptions of new philanthropic organizations were not needed and data that did not directly contribute to this network ethnography, as well as for reasons of space and the ethical orientation to protect individual confidentiality, were not included (Ball et al., 2017).

Thus, doing extensive observation work meant that the researcher knew the mission and goals of the new philanthropic organizations. This had advantages in preparing the grid of questions for this study because it enabled access to a large amount of information. However, accessing these private actors has been difficult in terms of availability for a recorded interview. As previously noted, with the aim of interviewing the employees of new philanthropic organizations engaged in social investment strategies in European education, an email presenting the research was sent to the selected organizations, asking for a recorded talk and underlying the academic purposes of the data collection. Some employees of the new philanthropic organizations, before agreeing to be interviewed, asked to receive the grid of questions and information on the research and the final dissemination of the collected data.

Moreover, as noted in the previous chapter, the global pandemic crisis slowed down the empirical analysis due to travel restrictions that prevented me from visiting the interlocutors and interviewing them face-to-face. In addition, many new philanthropic organizations' members did not work at full capacity from 2020 to 2022, and many of them worked remotely. Therefore, most interviews were conducted via telephone and online calling platforms, such as Google Meet, Skype and Zoom.

However, in 2018 the first interview was conducted in presence in Brussels, with the manager of external relations of the Young European Research Universities Network and three more face-to-face interviews (with 2 employees of the Fondazione Arnaldo Pomodoro and with one educator of the voluntary organization *Passo dopo Passo...Insieme*) were conducted in Milan in 2019 and 2022 after the elimination of the bans on frequenting public spaces due to the Covid-19 health crisis.

### **2.3.2 Fieldwork**

In order to add some materiality to my understanding of social investment strategies in education, especially regarding the relationships implemented by new philanthropic organizations in the sector, I conducted fieldwork in Brussels and Milan between February 2018 and March 2022. It involved the observation of meetings and the space of new philanthropic organizations. The field observations provided an ethnographic experience that allowed me to better understand the culture of new philanthropic organizations by observing the corporate decorations of offices, events and the small talks that take place between meetings. Some pictures of one of these observations are used in the empirical analysis presented in Chapter 10.

As outlined in the previous section, my fieldwork started when I interviewed the external relations manager of the Young European Research Universities Network in Brussels, in 2018. I prepared expansively for this interview, having studied the role of the interlocutor, and then set a grid of questions. During the interview I asked the interviewee about the main partners of the organization, and who she

saw as the references and leaders of the network in which the organization is involved. Subsequently, I was able to better define the questions and objectives of my research, and therefore the institutions and people I tried to interview next by analyzing the information provided by the interviewees and by listening to informal conversations after the interview.

There were two other field observations that supported my understanding of how the new philanthropy operates. Indeed, as noted in the previous section, the new openings to meeting in public spaces after March 2022 allowed me to take part in two participatory observations in the spaces of the volunteer association *Passo dopo Passo... Insieme*: an after-school session, called “Meglio dopo Insieme”, on 11 March 2022, and a monthly team meeting on 28 March 2022.

The first observation, concerning a session of the after-school service “Meglio dopo Insieme” was held at the oratory of the church of San Giovanni Battista in Sesto San Giovanni, province of Milan. On this occasion, I was welcomed by a young educator, who manages the after-school service activities, such as the preparation of the classes, the assignment of each group to a volunteer “teacher”, the greeting of the students at the entrance with a short summary speech of the main activities and events concerning the association, the invitation to prayer before starting to study. During the after-school session, I was able to observe the physical space of *Passo dopo Passo...Insieme* (with stands, folders, classrooms), catching more details on the culture of the organization.

I also participated in the monthly *Passo dopo Passo...Insieme* team meeting on 28 March 2022, where I was invited by the vice president and coordinator of educational activities. The meeting was held at the headquarter of the organization in Sesto San Giovanni. It focused on discussing future projects, relationships with parents, difficulties of the volunteers in carrying out the after-school service, etc.

According to McCann & Ward, (2012, p. 46), “as well as following policy actors and policies, we can also follow places.” These include conferences, seminars, workshops, guest lectures, site visits, among many others the sorts of situations in which we found ourselves researching (Cook and Ward, 2011). Hence, “they are not just spatial situations but also social ones and, therefore, provide numerous opportunities for research.” (McCann & Ward, 2021, p. 47).

Finally, since the spread of the pandemic crisis did not allow me to take part in observations in presence from 2020 until March 2022, during that period I participated in digital events, online conferences, webinars and streaming projects openings promoted by new philanthropic organizations, specifically focused on social investment strategies, non-profit activities and the digitalization of education process. For these events, I reviewed the schedule and watched the videos made available online. In the following table, I report the list of events which I attended.

**Table 2.3 List of main events**

<b>Webinars</b>	<b>Date</b>
<b>Impact weighted accounts initiative</b>	21 <sup>st</sup> October 2020
<b>SDG impact standards for bonds and equity funds (first session)</b>	11 <sup>th</sup> November 2020
<b>SDG impact standards for bonds and equity funds (second session)</b>	30 <sup>th</sup> November 2020
<b>Impact weighted accounts initiative</b>	21 <sup>st</sup> October 2020
<b>Empowering the school for digital transition</b>	21 <sup>st</sup> March 2021
<b>Innovative vision, financial investments, digital tools</b>	20 <sup>th</sup> March 2021
<b>Social and education impact</b>	20 <sup>th</sup> March 2021
<b>Play and learning between digital and STEAMS</b>	18 <sup>th</sup> March 2021
<b>Taxation of third sector entities and the destiny of NGOs</b>	2 <sup>nd</sup> March 2022
<b>Register of the National third sector organizations: state of the art</b>	9 <sup>th</sup> March 2022
<b>The role of philanthropic actors in the third sector</b>	16 <sup>th</sup> March 2022

### **2.3.3 Limitations**

The thesis focuses on the network of relationships of new philanthropic organizations targeting social investment in European education with public and private stakeholders, as the details of broader networks in the area of social investment in education are beyond the scope of the study.

At the same time, in this study, the analysis remains underdeveloped, due to space constraints. What I have attempted here is a shift from simply mapping networks to analyzing network dynamics and policy mobility, understood as the labour of networking, the evolution of the network and the work that networks do in relation to reimagining the policy and governance in the context of policy move. Central to this is

the idea that as policy move, the sites and landscape through which and across which they move change. Hence, as this investigation used a case study methodology there is an understandable opportunity for other case studies to explore strategies for social investment in European education (Ball et al., 2017). Finally, as Peck & Theodore (2015) argue, there is a need for more research to attend to the proliferation, flow, adaptation and augmentation of global education policy models, and their cumulative effects.

## **2.4 Conclusion**

In this chapter, I proposed a methodology based on network ethnography and a form of representation through graphs to describe the social investment strategies in European education pursued by new philanthropic organizations. I chose this approach because it seemed particularly suitable and representative for comparative analysis between new philanthropic organizations involved in complex networks.

Furthermore, according to Ball (1993, p. 10), “what we need in policy analysis is a toolbox of diverse concepts and theories.” To this end, the chapter outlined the methodological approach used in the empirical investigation, which can be summarized as a qualitative case study method using network ethnography.

Finally, the analytic approach of the thesis can also be defined as the adoption of a policy network perspective, which allowed the study to collect relevant data on different aspects of networking processes in social investment strategies in European education and their context in order to display topological visualizations of policy networks in education.

## Chapter 3

### New philanthropy in European education

This chapter outlines the policy area of interest for the thesis, that is social investment in European education. The analysis conducted in the following paragraphs returns a specific profile of the new philanthropy, connected to dynamics of intersection and hybridization between the logics of social and economic value (Arrigoni et al., 2020).

The first paragraph argues for the theoretical positions concerning the emergence of social investment ideas in the debates about social spending in welfare states in Europe, where such concepts became an integral part of the institutional discourse since the adoption of the Lisbon strategy and consequently of the economic crisis of the second half of the 2000s, which made it clear the limitations of the public sector in satisfying social needs.

The second paragraph focuses on the emergence of new philanthropy, which treats donations as investments and aims to be involved in decisions about the use of money (Avelar & Ball, 2017). Throughout the chapter, the moralizing nature of philanthropy is introduced and refers to the possibility for organizations to create moral and social good in relation to their ability to solve problems and be market oriented. Hence, the sections highlight how the ethos of the new trend of philanthrocapitalism is influencing social enterprises and foundations to compete over which organizations are most profitable and connected to the private sector, claiming the benefits of “doing good by doing very nicely indeed” (The Economist, 2006).

The third paragraph discusses the entry of new philanthropic organizations in European education governance networks, interlinking business, philanthropy and government bureaucracies and becoming incorporated into state policy (Ball, 2008). I also highlight how, edu-businesses have become influential policy actors in education, connecting the development of new modes of network governance, both nationally and globally, within state restructuring and associated processes of education policy production.

Finally, the last paragraph of the chapter considers “the rationale for emphasizing the specifically digital aspects of educational governance” (Williamson, 2016, p. 5), analyzing “how digital software and scientific expertise are mobilized together in the new sciences of learning, and their implications for educational practices and policies.” (Williamson, 2019, p. 3).

### **3.1 The rise of the “social investment paradigm”**

In order to introduce the policy area of social investment in education, the following sections discuss the implication of adopting such policies in European welfare states. The paragraph also underlines how the rise of the social investment paradigm is mainly due to the reduction of public spending levels and the growing demand for new services, which have affected several countries in recent decades.

I also present the European social investment strategy highlighting the need to reorient member states' policies towards measures that can guarantee the adequacy and sustainability of welfare systems.

#### **3.1.1 The transition to social investment policies in Europe**

Social investment is the set of policy measures and tools that consist of investments in human capital and in improving people's ability to participate in social and economic life and in the labour market (European Commission, 2015). The basic foundation of the European social model, established during the boom period after 1945, was to guarantee social welfare and social rights independently of the relationship to the labour market. Western European countries therefore adopted the social investment framework by introducing specific policy approaches and social protection institutions tailored to their own needs and contexts.

The late 1980s and 1990s were characterized by reductions in social spending levels. From then on, new macroeconomic policies gradually became the norm in Europe and emphasized budgetary rigor. Therefore, there was a growing demand for the role of the state to be downgraded, since it was perceived as too costly and inefficient, and for a reallocation of social responsibilities towards other social forces, such as the market, the family, or community associations (Palier, 2006).

Furthermore, the economic crisis that began in the second half of the 2000s made it clear that the welfare model had limitations in generating social cohesion. Globalization, the low rate of economic growth and the demand for new services have in fact challenged the European development model. Hence, increasingly attempts to organize a response to these challenges have taken place outside the traditional structure of political parties or trade unions, exploring less hierarchical and more participatory forms. The economic crisis has also accelerated the need for rethinking the respective roles of the market, the state and the third sector. In this context, growing global competition, public budget constraints, new forms of organization and interaction between the public sector, civil society organizations, private enterprises and citizens have created a common ground of social behaviour around a shared responsibility towards social and economic development (European Economic and Social Committee, 2013).

The idea of social investment has emerged as a policy perspective in response to fundamental changes in our societies with the twin ambitions of modernizing the welfare state, so that it can better respond to the new social needs, and to ensure its financial and political sustainability. The focus of the social investment perspective is on public policies that “prepare” individuals, families and societies to adapt to



different transformations, such as the emergence of new social risks rather than simply generating responses aimed at “repairing” any harm caused by market failure, social misfortune or the prevalence of political inadequacies (Morel et al, 2012).

Moreover, social investment has taken on a major part in debates about the role of social spending and the future of the welfare state in Europe, where its language has become an integral part of institutional discourse since the adoption of the Lisbon agenda in 2000 (Nolan, 2013). Recent thinking on welfare state transformation has focused on the notion of social investment, referring to policies aimed at helping disadvantaged people by improving their chances in life, especially their chances to be successful in education and the labour market. The use of the term “investment” also suggests that these policies can generate “returns” for the “investor”, that is society. Therefore, the social investment perspective understands returns in quantifiably terms. For example, investing in education or childcare increases the productivity and earning capacity of individuals, who are consequently less likely to claim benefits and more likely to pay taxes (Bonoli, 2013).

In this scenario, the transition to social investment policies must respond to a twofold objective: on the one hand, to increase the number of people active on the labour market, in order to broaden the welfare tax base with which to guarantee sustainable social spending in the long term; on the other hand, to improve human capital and labour productivity with investments in education from early childhood, as a starting point for a long-term investment strategy on all phases of the life cycle (Ciarini, 2020). Thus, social investment emphasizes the development of human capital and a notion of equal opportunity which also implies some equality of outcomes (Bonoli, 2013). Finally, Vandebroucke et al. (2011) call for a “social investment pact for Europe”, which even in the current difficult fiscal environment should prioritize investment in policies supporting, for example, children and lifelong learning.

### **3.1.2 The European strategy of social investment**

Since the Amsterdam summit in 1997 the European Commission has contributed to lay the foundations for social investments, from the first important steps of the Lisbon Agenda of 2000 to a real welfare paradigm codified in the Social Investment Package of 2013 (Hemerijck & Ronchi, 2020). While acknowledging the fundamental role played by welfare systems in Europe to ensure inclusive growth and their stabilizing functions, the European Commission reiterated the need for a further effort to respond to citizens' needs (Maino, 2017). Therefore, the Social Investment Package was launched to help reorient members states policies towards social investments to ensure the adequacy and sustainability of social systems, linking these efforts to the best use made of EU funds (European Commission 2013b). This objective is pursued by acting along three guidelines, which are presented in Table 3.1.

**Table 3.1 Guidelines of the European Commission to reorient policies towards social investments**

Guidelines	Actions
<p><b>Investing in efficient and effective social spending</b></p>	<p>Simplifying and targeting social policies to integrate services between governments and local areas, by promoting a person-centred approach</p> <p>Planning services strategically through the use of ICT</p> <p>Collaborating with the private and the third sectors to improve the quality of services provided</p>
<p><b>Investing in citizen empowerment</b></p>	<p>Preparing persons to successfully deal with risks such as unemployment rather than react in a remedial way through the provision of subsidies</p> <p>Investing in education and in the care of minors from the first years of life, especially in children from disadvantaged families, significantly increasing the probability of achieving good results in education, good job and income opportunities</p>
<p><b>Investing in people throughout their lives</b></p>	<p>Accompanying citizens throughout their lives</p> <p>Integrating prevention policies with adequate social protection at critical moments, such as the school-work transition</p>

In 2013, therefore, the use of public-private partnerships (PPPs) was included for the first time in the programming of the structural funds for the 2014-2020 period, as one of the investment instruments to be used to achieve the objectives of the European strategy 2020. According to data from the European PPP Expertise Center (2018), between 2000 and 2017 more than 1,800 PPPs were financed in Europe for a total value of around 370 billion euros (Hemerijck & Ronchi, 2020), opening up various kinds of flows of methods, values and culture between the private and the public sector (Ball & Youdell, 2008).

After the Social Investment Package, in September 2015, the President of the European Commission Juncker launched the European Pillar of Social Rights (Juncker, 2015). The Pillar establishes 20 fundamental principles and rights to support the good functioning of fair labour markets and social protection systems. The principles and rights enshrined in the Pillar are divided into three categories: equal opportunities and access to the labour market, fair working conditions, protection and social inclusion (European Commission, 2016a).

### **Box 3.1 The development of philanthropy since the 19<sup>th</sup> century**

Philanthropy is usually defined as the “love for humanity”, from the Greek language ‘philía’ (friendship) and ‘ànthrōpos’ (humanity). Its first initiatives were recorded in the United States (US) in the 19<sup>th</sup> century, when, after the Civil War, a certain number of Americans became rich to shape community affairs by themselves. Later, in the 19<sup>th</sup> century, the development of philanthropy was allowed mainly under two conditions: a powerful mix of fiscally-privileged procedures that philanthropists adapted to their strategies of social change and the creation of foundations to administer large gifts. In the early 20<sup>th</sup> century, philanthropists stopped limiting themselves to narrowly defined causes, as required by both tradition and the existing legal framework of charity, and began to promote the “well-being of mankind”, facilitating the emergence of “mass philanthropy”. It consisted of a “people’s philanthropy”, in which all middle and working classes American citizens had the ability to donate to a specific cause and be engaged in their own welfare.

Furthermore, the advance of mass philanthropy was made possible by unfortunate circumstances: the outbreak of First World War and the spread of tuberculosis disease in the US. Both of these historic events led American citizens to donate. In particular, regarding First World War, the US government drew on philanthropy’s expertise in mass fundraising, establishing charitable giving as a permanent feature of the 20<sup>th</sup> century life. The scale and scope of First World War fundraising benefited from the collaboration of several civil society institutions, as the Red Cross, churches, libraries and elementary schools, where the donation collection took place. Moreover, the emergency has made fundraising a permanent part of the country’s routine and “giving” has become a measure of citizenship. Therefore, “Foundations originating in large private fortunes have collaborated with institutions of mass philanthropy in promoting scientific research supporting educational agencies and fighting for human rights. Together they had forged a philanthropic sector that donors, beneficiaries and the state recognize as a critical source of ideas as well as of funding” (Zunz, 2012, p. 3).

Philanthropy has developed in European countries since the 1970s, due to the generalized crisis of welfare systems, the slowdown in economic growth and the rapid rise of unemployment. At the time, public revenues were growing at a slower rate than in previous years, while government spending increased faster, especially in countries where subsidies for unemployed and retired were generous. An initial reaction of these countries to the fiscal crisis was to slow down the provision of social services. In addition, governments have adopted different measures to reduce the impact of state provision costs on the public budget, such as the privatization of services. As a result, privatization policies were implemented both by separating financing responsibility, which rested with the public authorities, from the provision of services, which was contracted out to private companies, and by ceasing the production of some services. At the same time, the offer of services was made more dynamic thanks to decentralization towards local private providers, allowing for better acceptance of civil society activities.

## **3.2 Recent trends in new philanthropic investments**

After having presented in the previous paragraph the social investment policies that have gained attention in the European policy-scape in the last decades, in the following sections I will introduce the main actors implementing this type of investment in the field of European education, which has recently been affected by cuts to spending like other public sectors.

The paragraph also conceptualizes the new philanthropy, recent trends in philanthrocapitalism and emerging post-capitalist philanthropy in the context of the redistribution of tasks within public service provision and the new relationships developing between private providers, consultants and non-profit organizations to solve emerging social problems.

Therefore, new philanthropic actors are presented as key players bringing the private into the public sector in the form of joint ventures and profit sharing, within developing heterarchies.

### **3.2.1 Capitalism, non-state actors and heterarchies**

Governments today are attracted by the influx of new money, new ideas and new forms of service delivery, especially in response to the failures of public sector organizations. In this context, a “new conception of philanthropy and aid intentionally blurs the line between business, enterprise, development and the public good, and poses fundamental questions about the methods and the future role of traditional development agencies.” (Ball & Olmedo, 2011, p. 84). The process of “destatization” (Jessop, 2002, p. 199) involves the “redrawing [of] the public-private divide, reallocating tasks, and rearticulating the relationship between organizations and tasks across this divide.” This reallocation has various aspects, such as the creation of PPPs, the procurement of state services to private providers, the use of think tanks, consultants and knowledge companies for policy research and evaluation, the promotion of philanthropic activities and sponsorship to fund educational programmes and innovations, the involvement of the voluntary sector (charities, NGOs, trust, foundations, etc) in service provision, and the use of social entrepreneurs to address social problems (Ball, 2010a).

“In other words, tasks and services previously undertaken by the state are now being done by various ‘others’, in various kinds of relationship among themselves and to the state and to the remaining more traditional organizations of the public sector, although in many cases the working methods of these public sector organizations have also been fundamentally reworked, typically by the development of market forms, such as competition, choice and performance-related funding. Thus, new voices and interests are represented in the policy process, and new nodes of power and influence are constructed or invigorated.” (Ball, 2010b, p. 155).

Moreover, today, “the market is uncritically presented as a redeeming space and a new source of alternative solutions to development problems.” (Ball & Olmedo, 2011). States also increasingly share

the work of governing with other social actors (Bevir, 2011). In this context, decision-making processes and implementation systems that used to be mainly executed by the state are increasingly dispersed in complex networks of non-governmental institutions and agencies (Ball & Junemann, 2012). The social, moral and financial dimensions are therefore intertwined, and articulated in terms of social need, risk and returns (Avelar & Ball, 2017).

Hence, “philanthropies of various kinds are taking on the moral responsibilities of the state articulated within a complex global architecture of economic and social relations.” (Avelar & Ball, 2017, p. 1). Such new sensibilities of giving and social investment increasingly use enterprise models as a new form of philanthropic organization, practice and language: venture philanthropy, philanthropic investments, entrepreneurial solutions, etc. These new philanthropists want to see measurable impacts and outcomes from their investments of time and money (Ball & Olmedo, 2011), also beginning to “assume socio-moral duties that were previously assigned to civil society organizations, governmental entities and state agencies.” (Shamir, 2008, p. 6). In addition, “the close and manifest interweaving between benevolence and business is in fact the heart of the contemporary philanthropy.” (Arrigoni et al., 2020, p. 2).

All this drastically blurs the unclear divides between public, private and third sectors and produces a new mix of hierarchies, markets and heterarchies. In this context, heterarchy emerges as an organizational form, between hierarchy and network, based on diverse horizontal links that permit different elements of the policy process to cooperate (Ball, 2010b). Hence, as Ball puts it:

“heterarchies are in part defined by commercial interest in particular policy outcomes, and some of the relationships within them are specifically contractual and financial, but they also encompass social commitments by volunteers and philanthropists. Sometimes the two are blurred” (Ball, 2010b, p. 158).

Finally, as stated by Marinetto (2003), the state is now dependent upon a vast array of state and non-state policy actors. Therefore, partnerships between the public and private sectors are a key feature within emerging heterarchies. They are a linkage device and encourage a relative coherence among diverse objectives, bringing about a form of values and organizational convergence and reshaping the context within which public sector organization work. Some forms of partnerships and consortia bring “the private” into the public sector in the form of joint ventures and profit sharing (Ball, 2010b).

### **3.2.2 The evolution towards the new philanthropy**

The move from traditional, or “palliative philanthropy” (philanthropy 1.0), to “developmental philanthropy”, (philanthropy 2.0), and finally to “profitable giving” (philanthropy 3.0 or “new philanthropy”) represents a process of progressive involvement of the business in the sector of social investment. Furthermore, new philanthropy features are identified by an “inventive vocabulary”. “Effective Philanthropy, Catalitic Philanthropy, Strategic Philanthropy, and more recently Philanthrocapitalism,

are some of the definitions most in use that highlight different aspects of the phenomenon, such as the entrepreneurial dimension, measurability, innovative power, the assumption of risk.” (Arrigoni et al., 2020, p. 2). In particular, the expression “new philanthropy” was born within the generation of dot-com, information and digital industry entrepreneurs, as a different and “strategic” philanthropy, interested and capable of producing and measuring the impacts of doing well. More generally, the term refers to the vast theoretical and social movement to rethink non-profit, liberality, solidarity and collaborative commitment (Università Cattolica, 2017).

Philanthropy 3.0 can also be defined as “venture philanthropy” since it is based on venture capital, a form of investing in high-risk start-ups and high-risk businesses. Furthermore, venture philanthropy has developed since the mid-1990s as a result of a few trends: the general proliferation of entrepreneurial approaches to achieve social change; the increasing acquisition of professionalism by civil society; the general growth of wealth; the evolution in terms of donors demographic population; the willingness of donors to be involved in charitable activities. Furthermore, according to Ball and Olmedo (2011):

“Philanthropy 3.0 is part of a new configuration and logic of action for policy and a new set of relationships related to development problems and grand challenges – what we might call ‘network philanthropy’. That is, in order to understand the work of ‘new’ philanthropic organisations and their ‘partners’, we need to consider them not from an individual perspective, as isolated actors, but as interconnected nodes that operate according to network logics, and configure their agendas and links in changing and fluid ways. These networks rework and repopulate the international education policy community, connecting up the interests and activities of enterprises, governments, philanthropy and non-governmental agencies in new ways.” (p. 86).

In these new philanthropic generative nodes, network members are bonded together through a shared view of what education should be, what the policy problems are, and the necessary policy solutions (Avelar & Ball, 2017). These networks repopulate the international education policy community, connecting the interests and activities of enterprises, governments, philanthropy and non-governmental agencies in new ways. Thus, these new sites could be understood as “generative nodes” aimed at facilitating new connections and linking opportunities. They constitute “new sites of policy mobilization” and “globalizing microspaces” that operate between and beyond traditionally defined areas of policy formulation, such as localities, regions and nations (Ball & Olmedo, 2011). Therefore, the central activity of these new philanthropic generative nodes is to promote partnerships, new projects and investment agendas by creating “networks within networks” based on the symbolic and economic capitals of the participants that they are able to mobilize. “Moreover, by enabling global social, political and economic connections, these generative nodes become key spaces in the fields of social and education policy” (Ball & Olmedo, 2011, p. 86).

### **3.3 Philanthrocapitalism generating education services to combat inequalities**

The following sections highlight the main characteristics of emerging new philanthropic investment in education, the presumed moralizing nature of this type of investments and their influence on policies at the global level.

After having presented the main players in the field of new philanthropy in the previous sections, in this paragraph I focus on the evolution of new philanthropic investments towards philanthrocapitalism, which combines business with charitable actions, making philanthropy financially profitable.

The supposedly moralizing nature of philanthrocapitalism is introduced which considers philanthropic investments as opportunities for philanthropists to make private gains tied to their donations. As I will also illustrate in the last section of the paragraph, due to the unprecedented scale of philanthropic spending, philanthrocapitalism is able to capitalize on and combat conditions such as inequalities, generating services in the form of solutions to social problems.

#### **3.3.1 From philanthropic investments to philanthrocapitalism**

Economic studies on philanthropy have often intertwined with behavioural psychology, investigating the contradiction between self-interest and altruism (Arrigoni et al., 2020). Indeed, many today believe that philanthropy “is not just a gift.” (Arrigoni et al., 2020, p. 2). In this scenario, the idea that charity must begin to resemble a capitalist economy in which benefactors become consumers of social investment is sometimes called philanthrocapitalism (Ball & Youdell, 2008).

Philanthrocapitalism is defined as the trend of donors to merge business aims with charitable actions, making philanthropy impact oriented (McGoey, 2012). A central feature of philanthrocapitalism, beyond the self-interest, is its moralizing nature. Indeed, a new economic élite of plutocrats composed of philanthrocapitalists has the money and power to transform society and address problems that cross national boundaries. Therefore, philanthrocapitalism can also be considered an ideological formation, which projects a shared purpose into the increasingly unequal societies of contemporary capitalism, through post-political discourses underpinned by an economy of “jouissance” (Wilson, 2014).

The term philanthrocapitalism was coined by *The Economist* (2006), underlying the union between the reasons for giving and the mechanisms of accumulation (Arrigoni et al., 2020). Hence, Bishop and Green, in their book “Philanthrocapitalism. How giving can save the world” (2008), argue that philanthrocapitalism encompasses not only the application of modern business techniques to giving but also the effort of a new generation of entrepreneurial philanthropists and business leaders to drive social progress by changing how the business and government operate. This book has become a manifesto for a new generation of philanthropists who aim to apply market strategies to philanthropic giving, emphasizing the explicit conflation of markets and morality, of public and private spheres and the moral advantages of capitalism (McGoey, 2012).

Since 2008, the term philanthrocapitalism has begun seeping in the common parlance (McGoey, 2012). Today, the public influence of philanthropic actors is growing, not only in America, where the relationship between private virtues and public affairs is traditionally strong, but also in Europe, where the search for recognition opportunities is entrusted to increasingly structured representative associations. In this context, the rising financial trend of philanthrocapitalism is celebrated as a new golden age of capitalism, in which the state economy has made space for philanthrocapitalists to engage in charitable acts that replace the social functions of the state.

Furthermore, the consistency of the phenomenon has led to the comparison between interpretative perspectives of different sign, not always optimistic. Of particular interest are the reflections that attempt to reveal the normative dimensions at the heart of the concept of philanthrocapitalism (Arrigoni et al., 2020). Rogers' reflection (2011, p.381) summarizes the answers formulated in this regard in three "M". The first M is money: "the idea that the wealthy, particularly the super wealthy, should take greater responsibility for using their wealth for the common good". The second M refers to the market: "the idea that market forces should sort effective social programs from ineffective social programs". Finally, the third M indicates the measurement: "the idea is that resources should be used in a targeted and rational way based on data in order to identify and scale successful social programs".

### **3.3.2 The presumed moralizing nature of philanthrocapitalism**

"Despite claims to the contrary, the ideology that underpins philanthrocapitalism – the notion that, in Bishop and Green's words, 'capitalism itself can be philanthropic, working for the good of mankind' – has a long history that harks back to a core tenet of 18th century political economy." (McGoey et al., 2018, p. 38).

Indeed, philanthrocapitalism echoes the debate voiced by Smith in "The Wealth of Nations" about the idea that markets left to their own devices naturally contribute to the common good. Furthermore, against the view of capitalism as a system void of moral underpinnings, Hirschman has explored the origins of capitalism as a scheme acclaimed for its perceived moral ability to distribute wealth (Hirschman, 1982). As he argues, since the 18<sup>th</sup> century modern market has been considered a naturally philanthropic system, in which the exploitation of shared commercial interests was seen as an antidote to the proliferation of national conflicts arising from the pursuit of national self-interests over economic cooperation (McGoey, 2012).

Thus, philanthrocapitalism can be seen as the most recent iteration of a theory of capitalist development that proposes self-interest and public benefit as naturally interlinked. However, what is new is how the ideas underpinning philanthrocapitalism have become so influential today when, in the past, similar concepts incorporated in theories of economic liberalism were seen as ideologies that served to enforce the unjust power of plutocratic wealth elites (McGoey et al., 2018).



Furthermore, as noted by McGoey, one condition is distinct from previous periods and it is the “outspokenness of the self-interested motivation of charitable gestures” (McGoey, 2012, p. 11). As she argues: “what is new within philanthrocapitalism is the very openness of the opportunities for private gain” (McGoey, 2012, p. 12). Previously, in fact, the legitimacy of philanthropy stemmed from the strategic ignorance of both donors and recipients of openings for economic progress. Today, groups and individuals who are perceived to have an obvious interest in remaining silent about the economic interests driving philanthropic and entrepreneurial projects are becoming increasingly vocal about the benefit of combining altruism with self-interest (McGoey, 2012).

### **3.3.3 Philanthrocapitalism influencing institutions at the global level**

Another important feature of philanthrocapitalism is “the unprecedented scale of philanthropic spending” (McGoey, 2012, p. 7). Despite the fact that the amount spent by wealthy countries on national welfare exceeds the amount spent by private philanthropic foundations, such foundations have become incredibly socially and politically dominant, exceeding their actual financial influence (McGoey et al, 2018).

In this scenario, the Gates Foundation is a prime example of philanthrocapitalism, applying corporate practices developed at Microsoft to the areas it prioritizes (Bishop & Green, 2008). The Gates Foundation’s growing influence on its main three priority areas (global health, global agriculture and education policy of the US) has drawn increasing criticism from policy-makers concerned about the foundation’s lack of accountability to stakeholders affected by its funding decisions. Criticism has focused on where its grants are disbursed and where its donations are invested. Indeed, the majority of foundation’s funds are directed to organizations in high-income countries, intensifying inequalities of development between rich and poor regions (McCoy, et al., 2009).

The ability to simultaneously capitalize on and combat such conditions of inequalities is a defining characteristic of philanthrocapitalism. This dynamic can also be defined as a form of “cognitive dissonance” which Zizek (2006) has termed “liberal communism”, referring to it as the magnificent of increasingly concentrated levels of wealth as an intrinsic safeguard of the common good. In this context, a debate is developing on whether the new philanthropy can be considered as a vehicle to increase private profit. Although Bishop and Green argue that a marked feature of philanthrocapitalism is that philanthropy can be personally profitable, only a small segment of the field, namely impact investing, allows individuals to achieve tangible financial gain by investing in projects aimed at providing goods or services to people who lack them (Nicholls, 2010).

It can also be argued that, in the field of education, as new philanthropic organizations are contributing to the global education policy debate, they are building the education policy problems that will generate a market for their products and services in the form of the solutions. Moreover, as part of their reworking as “social purpose” companies, they also position themselves as responsible in contributing to provide solutions to the world’s educational problems. This is a strategic placement within the policy process

(Ball & Junemann, 2011). An example can be drawn again from the Gates Foundation's power over education policy of the US, "where its ability to attach specific conditions to its gifts makes it possible to disproportionately influence where and how federal dollars are spent - despite its negative impact on US public education policy." (McGoey, et al, 2018, p. 7). Hence, in 2016, the newspaper LA Times surveyed the record on Gates Foundation's grants towards education in the US and reached the conclusion that most of the initiatives championed by the foundation ended in failure, often causing disorder for schools (LA Times, 2016). However, the most widespread media response has been negative to such criticism, implying that the Gates Foundation should be treated as beyond censure. This mechanism has the effect of making public debate about the effectiveness of recent philanthropic decision-making uncomfortable, even when recent structural changes raise profound questions about the limits of philanthropy (McGoey et al., 2018).

Also, when criticized for investing in companies proven to negatively impact health, the Gates Foundation announced it would rethink its investment strategy. Nevertheless, it confirmed that previous policies would stand, and continued to invest in companies that maximize financial return regardless of the adverse effects caused by the companies involved (Beckett, 2010). In this context, the foundation's reluctance to decline profitability underlines a reality of philanthropic investing throughout the 20th and 21st centuries (McGoey, 2012). Therefore, "the ability to give generously is contingent on sustaining business practices that are strategically blind to externalities that could undermine their own competitiveness." (McGoey, 2012, p. 9).

### **3.3.4 Towards post-capitalist philanthropy**

In recent years, promoters of philanthrocapitalism have begun to advocate for an even clearer "new division of labour (...) between governments, businesses, charitable NGOs, and philanthropists" in order to solve "the stagnant problems of the world." (Bishop and Green 2010, p. 12). This new philanthropic approach has gained an increasingly important political dimension, becoming a central explanatory variable to understand the recent changes of national and international political agendas (Olmedo, 2014).

Furthermore, in new post-capitalist society, the basic economic resource is no longer capital, but knowledge. In this scenario, self-renewal, goodness and virtue are likely to be seen as existential rather than a social goal. The end of the belief in "salvation by society" also makes renewed emphasis on the person and leads to a return to individual responsibility (Drucker, 2011). Therefore, post-capitalism can be defined as:

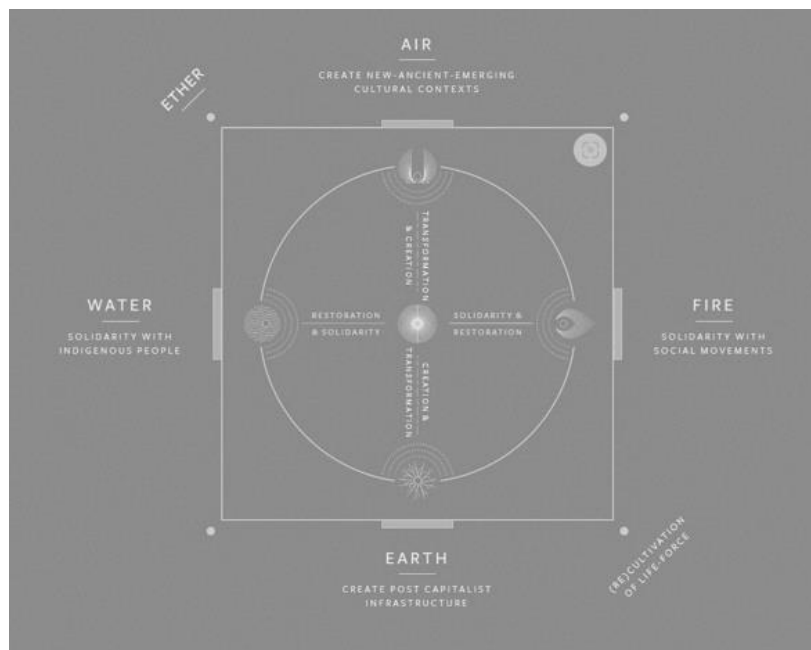
"a conceptual container for social pluralities based on shared values (e.g. reciprocity, altruism, cooperation, gifting, equity consciousness, empathy, interbeing and solidarity with

all Life). It stems from the shortcomings of the existing system and the lived experience of life-centric alternatives.”<sup>3</sup>

The goal of a new system must thus be broader than just replacing the capitalist society. It should also transform the anthropocentric, extractivist, racist and patriarchal system (Transnational Institute, 2018). In this context, emerging post-capitalist philanthropy focuses on the use and transformation of wealth to usher in life-centric systems. Engaging in post-capitalist philanthropy requires actively giving up capital, through different grantmaking practices and spend-down of endowment, effecting an ontological shift. Therefore, a central question for post-capitalist philanthropy concerns how to use capital to build post-capitalist political economies, infrastructure, and systems.

The new philanthropic organization Transition Resource Circle has elaborated a model to represent some “coordinates of possibility” for transition pathways towards post-capitalist philanthropy, rooted in five elements (air, fire, ether, water and earth) and two intersecting axis. The Y-axis represents “transformation” and “creation” focused on building and catalyzing emerging ways of living, by generating post-capitalist cultures and infrastructure. The X-axis represents “restoration” and “solidarity”, which address historical injustices while rebalancing relationships in society.

**Figure 3.1 Transition pathways towards post-capitalist philanthropy**



The transition pathways towards post-capitalist philanthropy can be implemented through different lines of actions, introduced in the following table.

<sup>3</sup> <https://www.postcapitalistphilanthropy.org/knowledge>

**Table 3.2 Lines of action towards post-capitalist philanthropy**

<b>Lines of actions</b>	<b>Initiatives</b>
<b>Indigenous people</b>	Empower indigenous people, who represent the 80% world's biodiversity despite constituting about 5% of the world's population
<b>Social movements</b>	Forging life-centric alternatives through direct experience and place-based knowledge
<b>Post-capitalist cultures</b>	Creating emerging post-capitalist cultures, re-imagining and reconstituting ideas and consciousness
<b>Post-capitalist infrastructures</b>	Build post-capitalist infrastructure that secure food, land, water, energy and cultural sovereignty at local and bioregional levels
<b>Life-force</b>	Reconsider life-force, addressing the roots of capitalist modernity and centering the relationship with life

Furthermore, Table 3.3 illustrates practices for a behavioural change as part of a growing call to transform philanthropy in post-capitalist philanthropy.

**Table 3.3 Practices to generate post-capitalist philanthropy**

<b>Practices of post-capitalist philanthropy</b>	<b>Actions</b>
<b>Providing long-term (five to ten years) operational support to organizations, social movements and communities</b>	Avoiding onerous bureaucratic work
<b>Transferring assets to marginalized communities</b>	Building local food, land, water, energy, educational and medicine sovereignty using endowment funds
<b>Engaging with “historical reparations”</b>	Divesting from equity markets
<b>Practicing relationally based giving</b>	Adopting giving circles and flow funding
<b>Decentralizing grantmaking and decision-making</b>	Supporting or co-creating community-led foundations
<b>Implementing fluid and flexible organizations and projects (e.g. NGOs, informal collectives, co-operatives, etc.)</b>	Deploying funds

In the context of post-capitalist philanthropy, the question of the state’s role is key. Among the models for the state to transform the monetary system, one possibility is the democratization of public budgets in which democratized, public control would replace the state system. Budgets could also be built based on public need and include a long cycle public consultation. Therefore, communities would both set the amount of the budget and decide how to allocate it (Transnational Institute, 2018). Hence, what the Transition Resource Circle is calling for, to “rethink philanthropy” is:

“to build and strengthen embodied political, cultural and spiritual practices. This includes creating gifting/reciprocity cultures that prioritize the quality of relationships; deepening into the ethics of our interconnectedness; and acknowledging the limitations of anthropocentric, siloed thinking. This also includes examining how to change the nature of finance capital, which keeps philanthropy afloat through the perpetual growth of endowment funds. These inquiries unearth difficult inner and outer explorations of what sacrifices and paradigm shifts are needed to instigate and create necessary transformations.” (Transition Resource Circle website<sup>4</sup>)

**Box 3.2 The Transition Resources Circle new philanthropic organization**

The Transition Resource Circle was initially conceived through The Rules, a global network of activists and researchers focused on tackling inequality and poverty. The Rule pioneered narrative intervention work by bringing together various disciplines including cognitive linguistics, biology, ecological economics and post-hierarchical capitalist approaches to systems change. Additionally, The Rules has begun working with funding activists:

“to begin transitioning away from exploitative systems often inherent in philanthropy.”

Thus, the Transition Resource Circle was formed as a “temporary organizational zone” in 2020 and fiscally sponsored by the New World Foundation in New York.

The new philanthropic organization works with resources and resource holders to:

“liberate capital to be in service to life through circle ways (e.g. non-hierarchical, embodied cognition approaches, psycho-spiritual practices).”

Source: <https://www.transitionresourcecircle.org/about-1>

<sup>4</sup> <https://www.transitionresourcecircle.org/about-1>

### **3.4 The emergence of new philanthropy in European education governance**

The next sections highlight how different social actors with various relationships to business are nowadays “inside” education policy, shaping new policy communities that incorporate a set of public and private stakeholders.

The paragraph also illustrates how these policy communities have their own internal relationships of trust and address social issues without recourse to traditional procedures, showing an increasing interdependence of state, private and voluntary sector (Ball, 2007).

#### **3.4.1 New public management and the corporatization of public schools**

The recent processes of globalization have led the nation-state going through various restructuring, often supported by the neo-liberal economic ideology which, in its ideal typic form, aims privatisation and marketization of everything. In the latest years, the bureaucracy has also been restructured according to new public management (NPM) and new forms of network governance (Ball & Junemann, 2012), which combine vertical hierarchies with more horizontal networks. Moreover, education policy has been seriously affected by such an epochal change (Hogan et al., 2015). As stated by Ball and Youdell (2008),

“NPM has been the primary means through which the structure and culture of public services are recast in order to introduce and entrench the mechanisms of the market form and forms of privatisation.” (p. 23).

Moreover, according to Normand (2011), the NPM establishes procedures and relationships emphasizing the responsibility of actors in relation to their capacity to be efficient. However, in the field of education, a limited public budget is redistributed in respect of expected outcomes based on principles of free choice and competition between institutions.

In this context, it is possible to identify NPM trends pervading public education: school management is increasingly becoming a specialized occupation; there is a growing tendency to “govern by contract”, which is visible in the school autonomy hiring policies, justified by central government as the need for more educational agreements and co-responsibility; public scrutiny of school government and management is on the rise, namely through the monitoring and evaluation of school results (Viseu & Carvalho, 2018).

Therefore, in the education sector, NPM means the promotion of school autonomy and a managerialist approach to school organization, market-driven competition between schools, outcomes-based incentives for schools and education services more oriented toward families’ demands. However, NPM is not being uniformly received and adopted in all countries. Its effects are in fact mediated by local history, administrative and ideational settings, and the interplay of global and local dimensions (Verger & Curran, 2014). Hence, as Ball and Youdell (2008) argue:

“in doing so it affects how and where social policy choices are made and systematically sidelines and disempowers education practitioners. It both subjects them to new forms of control through performance management techniques and encourages them to see themselves in new ways with new sorts of commitments and priorities – a process of ‘re-culturing’.” (p. 23).

“Education privatization can be defined broadly as a process through which private organizations and individuals participate increasingly and actively in a range of educational activities and responsibilities that traditionally have been the remit of the state.” (Verger et al., 2016, p. 7). As Ball and Youdell (2008) put it, privatisation can also be understood as being of two types, not mutually exclusive and often inter-related: “privatisation in public education” or “endogenous privatisation” (widespread and well established), where the public sector is asked to behave more like the private sector; “privatisation of public education” or “exogenous privatisation” (newer but rapidly growing), where the private sector moves into public education. These two types of privatizations are illustrated in the following table.

**Table 3.4 Endogenous and exogenous privatization dynamics in European education**

	<b>Privatization in public education or endogenous privatization</b>	<b>Privatization of public education or exogenous privatization</b>
<b>Main objectives</b>	Importing of ideas, techniques and practices from the private sector into public education	Design, management or delivering aspects of public education provided by the private sector
<b>Logics of action</b>	New managerialism in public education	Privatization of policy programmes
<b>Funding</b>	Budget devolution and competitive funding	Public financings to private schools
<b>Mechanisms of participation of private actors in public education</b>	Evaluation on the base of ranking calculation	Advice, consultancy and research for policy formulation and writing

Source: adapted from (Ball & Youdell, 2008).

Concerning the reasons allowing its emergence, “Education privatization can happen de facto or for structural reasons that, to a great extent, are external to the education policy domain—namely states’ inaction in the face of a growing demand for education and/or the changing educational needs of an emerging middle class.” (Verger et al., 2016, p. 7). Moreover, this can be seen as indicative of some moves towards and experimentation with the new mode of governance which involves a catalyzing of all sectors (public, private and voluntary) into action to solve community’s problems (Osborne & Gabler, 1992). Furthermore,

“the growing presence of non-state actors in policy processes has contributed to the redefinition of governance relationships and responsibilities within diverse policy domains. The private and philanthropic sectors have embraced new practices and discourses that transcend service delivery or conventional forms of giving, and have adopted advocacy and policy influence as key areas of activity.” (Fontdevilla et al., 2019, p. 131).

Therefore, the rise of private-public assemblages forming around and beyond the states is also challenging the ways of thinking about educational policy-making. In this context, the notion of “soft privatisation”, explores the growth of private sector services within the EU as a phenomenon deeply embedded in particular national modes of governance (Cone & Brøgger, 2020). Thus, “it is possible to conceptualise the notion of soft privatisation as a particular mode of governance in which private sector participation is highly integrated in, rather than a break from, public governance of education.” (Cone & Brøgger, 2020, p. 4), enabling the delegation of public operations to non-state or autonomous quasi-state agents while retaining the principally public status of institutions. In this context, according to Verger et al. (2016):

“a range of nongovernmental actors, including private corporations, private foundations, philanthropists, think tanks, and the media are increasingly active in the promotion of different forms of education privatization worldwide. [...] Recent transformations in the organization of the state and the emergence of forms of *governance by networks* have contributed to an increasing presence of private actors and private interests within public policy processes.” (p. 137).

### **3.4.2 Global edu-business shaping new philanthropic governance in education**

In the privatization scenario illustrated in the previous section, questions rise about the social backgrounds, resources and positions of actors representing “European civil society” in the EU governance model (Michel, 2007), especially in the field of education. The participation of private corporations in governance structures (Verger et al., 2016), focused on the promotion of business-friendly principles is hardly a new phenomenon, but the increasingly prominent role of profit-oriented private actors in a broader range of educational activities, and at a supra-national scale, is more recent. Currently, a wider range of educational services are produced, exchanged and consumed on a for-profit basis and through supra-national interactions. This phenomenon is also highlighted by the increase in private schools, edu-marketing, students’ recruitment services, supplemental education services, certification services, teacher training, etc. (Verger et al., 2017). All these additional services, the actors that provide them, and the systems of rules and norms through which these educational markets emerge and expand constitute the so-called “global education industry” (GEI).

Indeed, “Private firms and consultants are now very active in selling education services that have often previously been delivered by state authorities to schools as well as local and national government agencies.” (Ball & Youdell, 2008, p. 28). In this context,



“The GEI represents the apparently inexorable growth of the market into many areas of life previously thought to be outside the purview of market forces and arrangements. Nonetheless, the emergence and constitution of the GEI phenomenon reflect also particular changes and trends in the education sector, which include [...] the increasing influence of financial institutions in the educational sector.” (Verger et al., 2017, p. 326).

Multiple privatizations such as what Ball calls the Education Services Industry (ESI) have, thus, occurred in education governance, leading to some blurring of the public/private divide with the state now acting both as a “market maker” and a “broker” in respect of the ESI (Lingard & Sellar, 2013). Hence, according to Ball and Junemann (2012), networks of supranational, multilateral agencies and NGOs now include the role and impact of edu-business in the global education policy field.

“As with other industry sectors that are being globalised, education is increasingly populated by actors and firms motivated by profit (the so-called edu businesses), interactions and operations happening at a global scale, competitive dynamics between edu-businesses (but also between edu-businesses and public providers), access to financial capital markets as a way to support the activities of the industry (and its territorial expansion), mergers and acquisitions between corporations, and so on.” (Verger et al., 2017, p. 326).

In this context, edu-businesses have become influential policy actors in education. Their enhanced importance is linked to the development of new modes of network governance, both nationally and globally, that have emerged with state restructuring and associated changes in processes of education policy production (Hogan et al., 2015). Therefore, in the past decade, educational policy has come increasingly under the way of a venture philanthropy that is modelled on the venture capitalism of the early 1990s, which pushes privatization and deregulation in education by policy dictates of neoliberalism (Saltman, 2009). According to Saltman (2014):

“corporate school reform aims to transform public schooling into a private industry nationally by replacing public schools with privately managed charter schools, voucher schemes, and tax credit scholarships for private schooling.” (p. 250).

Furthermore, one of the most significant aspects of this transformation involves the ways in which the civic purposes of public schooling are being redefined by venture philanthropy in private ways. What is termed here as new global philanthropy in education, is based on an apparent “win-win” approach that encourages more hands-on interventions by philanthropic actors than in the past who are in search of measurable, tangible, scalable results to tackle issues, seemingly consensually defined as global social problems; and crucially, to insert the market in the public social sphere, specifically in education (Srivastava & Baur, 2016).

Thus, in the past decade, educational policy has come increasingly under the way of a venture philanthropy that is modelled on the venture capitalism of the early 1990s, which pushes privatization and deregulation in education by policy dictates of neoliberalism. Corporations are progressively active in promoting education privatization policies through various channels, such as philanthropy (Verger et

al., 2016). Indeed, what we are facing nowadays is a direct intervention of philanthropic organizations into the field of education policy. Hence, as Ball and Olmedo state,

“philanthropic governance [...] is the ways in which, through their philanthropic action, these actors are able to modify meanings, mobilise assets, generate new policy technologies and exert pressure on, or even decide, the direction of policy in specific contexts.” (Ball & Olmedo, 2011, p. 85).

Extending Ball and Olmedo’s (2011) conceptualization of “philanthropic governance”, the argument here is that discourse, meanings, and actors gain their legitimacy by intertwining three claims associated with philanthropic and non-state private actors: (a) normalizing long standing taken-for-granted assumptions of philanthropy with benevolence, goodness and altruism; (b) extending claims of private sector efficiency and effectiveness; and (c) stressing claims of neutrality to the philanthropic sector as the “third sector”, that is neither state nor purely private/commercial (Srivastava & Baur, 2016).

### **3.5 Ed-Tech actors marketizing European education**

In the following sections, I will deepen the analysis of new philanthropic actors implementing social investment strategies in European education. Among these actors, a leading role is played by Ed-Tech companies, which provide new tools for teaching and learning, especially in these years characterized by the Covid-19 pandemic crisis.

Furthermore, attention is placed on the ongoing development of digital technologies in the field of education and how this development is associated with a series of more specific societal, economic and cultural changes (Selwyn, 2013). Therefore, the paragraph highlights processes of marketization and privatization of European education, increasingly focused on investments enabled by technology businesses, that have expanded as part of the global education industry.

#### **3.5.1 Policy entrepreneurs and new technologies in European education**

Marketization refers to the introduction of market forces in education, where governments have created policy conditions that promote the development of markets in state provided services (Williamson & Hogan, 2021). Processes of marketization, privatization and consumerization of education are increasingly focused on achieving market value through competition, performance ranking, consumer demand, and return on investment, often enabled by digital technologies (Selwyn, 2011). In this context, private digital providers have rapidly expanded across educational systems as part of a “global education industry” (Verger et al., 2017). Moreover, digital platforms and technology companies produce

this industry, with the support of a diverse array of education agencies, think tanks, consultancies, enterprises and coalitions (Williamson, 2019).

In this scenario, “Technology businesses have recognized the market opportunities of digital education, allowing the growth of a global industry of educational technologies to involve every aspect of market segment of education activity, including student management systems, virtual learning environments, digital library, etc.” (Williamson, 2020, p. 4). Thus, platform-based businesses such as Google and Microsoft have reached unprecedented power to monitor, predict, and influence organizational, social, economic, political and human behaviours through the use of digital data. Furthermore, with the appropriation of the “raw material” of data, “the platform has become an increasingly dominant way of organizing businesses so as to monopolize these data, then extract, analyze, use and sell them” (Srnicsek, 2016, p. 88), enabling platform companies to become virtually monopolistic owners of the infrastructures of society.

According to the definition given by Kuehn (2019, p. 1), “A ‘platform’, in the technology field, refers to the digital structure upon which software and the range of available services therein are built.” Hence, “Recently, a growing body of literature is giving attention to digital platforms on education, by drawing on diverse theoretical orientations.” (Landri & Vatrella, 2019, p. 533). From the perspective of market sociology, platform capitalism itself is the product of myriad interacting market devices, techniques and strategies (Williamson, 2020). Therefore, according to Williamson, platform capitalism is the new global business model in an age of social media platforms, big data analytics and tech-centered venture capital investment. Here, a platform refers to internet-based applications such as social media sites that process information and communication, channel social traffic, and enable the creation and sharing of user-generated content. Moreover, as digital systems, intermediaries and businesses combined, platforms engage users through a participatory culture, then mobilize data analytics to enact a venture capital business model that prioritizes rapid up-scaling through network effects. Platform capitalism is, therefore, a business model based on the extraction of value from connecting people into networks and mining their data. In this context, education becomes “a data-rich area. Every action of a student and interaction between student, teacher and other students is a potential data point. The challenge for corporations, then, is to collect the data and determine how to monetize it.” (Kuehn, 2019, p. 2).

### **3.5.2 Digital technologies in education policy**

“It is hard to imagine the governance of education nowadays without digital platforms.” (Landri & Vatrella, 2019, p. 532). Today, in fact, massive digital systems are required to administer the flow of assessment data, administrative data and staff data that are all used in the management and control of educational systems, institutions and individuals (Williamson, 2016). Thus, through thousands of Ed-Tech start-ups, digital technologies have positioned for-profit interests at the centre of how public education is funded, organized and delivered (Selwyn, 2017). Therefore, “[...] digital technologies are associated with

potentially far-reaching shifts in the organization and governance of educational provision.” (Selwyn, 2013, p. 6).

Furthermore, “the platformization opens education to the interests of high technology companies that interpret education in their terms, in a way that can be favourable to them.” (Landri & Vatrella, 2019, p. 533). Hence, “the use of digital technology is a central component of most forms of contemporary education provision and practice. Crucially, educational technology is now a multi billion dollar business – involving global technology corporations in local educational provision and practice.” (Selwyn, 2017, p. 105).

Moreover, “in transnational spaces, like the European one, lines of technical mutation of education, its epistemologies, organizational forms and ethics are unfolding.” (Taglietti et al., 2021, p. 424). “For many academic commentators, the educational imperatives of technology involve a fundamental rethinking of the relationships between learners, knowledge, teachers and educational institutions.” (Selwyn, 2011, p. 29). In this context, “Educational technology has therefore offered a consistent means for nation states to bring economic and societal issues to bear on the structural processes of contemporary educational provision and practice.” (Selwyn, 2013, p. 79). It is also necessary to create a widespread public understanding of the nature of the power that is vested in these platforms. Indeed, “Uncritical use of the platforms produces a form of privatization that is unexamined and that places pedagogy in the hands of those who design said platforms.” (Kuehn, 2019, p. 8).

Finally, as sociotechnical market devices that “do things”, “act” or “make others act” (Muniesa et al. 2007, p. 2), digital platforms create new market behaviours, relations and transactions, changing how people and organizations see and act (Fourcade & Healy, 2017). Market-making actors, or “marketizing agencies”, include both human and nonhuman entities that “take part in the action and in the cognitive process”, and need to be understood as heterogeneous “socio-technical arrangements” that collectively participate in market-making (Çaliskan & Callon, 2010, p. 9). In this landscape, making new markets in education is a highly complex achievement demanding significant expertise, networks and relations (Verger et al, 2017).

### **3.5.3 The digital governance of education**

The integration of digital technology into educational systems has been a growing feature of state education policy-making over the past decades. Therefore, educational technology policy can be seen as a formalization of state intent to guide the implementation of digital technologies throughout national educational systems (Selwyn, 2013).

“Education governance is increasingly affected by and effectuated through digital means. Over the last years, the possibilities and opportunities of digital devices of all sorts have gained much attention from various policy-makers and organizations, and this both nationally as well as internationally.” (Decuyper, 2016, p. 2). Furthermore, policy-making, during the 1990s and 2000s, commonly took the form of

nationwide programmes of teacher training and support for IT industries, introduced by national governments to ensure that the circumstances existed for the effective educational use of internet-based digital technologies. Now, educational technology can be said to constitute a major policy concern across all nations, regardless of a country's global prominence or relative economic wealth. Most countries in the world regardless of political, economic or social circumstance boast substantial educational technology strategies (Selwyn, 2013).

In this scenario, Ed-Tech policy networks are hybrid and unstable, evolving and adapting, and merging with other more established networks of organizations that are themselves one small part of a bigger and longer-term reworking of the state, and of governance and education policy (Peruzzo et al., 2022). Moreover, some commentators have noted a distinct homogeneity across much of this policy-making activity, with the educational technology policy agendas of many countries appearing to conform to an "unusually common" set of characteristics regardless of otherwise varied national contexts (Zhao et al. 2006).

Finally, Ed-Tech companies have become installed in and occupy key sites of influence in the education state, and created new sites and processes of policy, bringing about the extension and elaboration of a particular topology of policy-making based upon existing and novel heterarchical relations, as new forms of network governance that see an increasing role of businesses in education (Peruzzo et al., 2022).

### **3.6 Conclusion**

The dynamics presented in this chapter highlight the role of new philanthropy in the ongoing reorganization processes in the fields of economics and politics (Arrigoni et al., 2020). So far, the chapter has introduced the theoretical approach that has informed the thesis, which considers new philanthropy as part of a new logic of action for policy and a new set of relationships related to development problems, and that we could also define as "network philanthropy" (Ball & Olmedo, 2011).

Therefore, the previous paragraphs have explored the new philanthropic governance in European education, allowing a deeper understanding of the links between the crisis of welfare systems and the emergence of new private actors in the provision of educational services. The transformations of governance settlements and processes of change can also be defined as deeply rooted in the dynamics of integration of digital technologies into educational systems, considered as an emerging characteristic of state education policy-making over the last decades.

Finally, after having discussed the theoretical framework developed in the thesis, in the next chapter I will introduce social investment dynamics in education in the Italian social and legal context, since Italy constitutes the research fieldwork.

## Chapter 4

### **Italy: new philanthropy and the reforms of the education and welfare**

The previous chapter explored the concept of new philanthropy in its most recent forms, how it was implemented in European education policies and how these policies have used issues such as marketization and privatization in ways that characterized profitability of opportunities for new philanthropic organizations.

This chapter examines new philanthropy in the Italian context. To carry out a comparative study of social investment strategies in education, Italy was the ideal country due to the presence of large and recognized new philanthropic organizations, which also exercise an active role in education governance and due to the enormous growth of new philanthropic initiatives in the last decades. The analysis of the socio-legal context of the Italian new philanthropy is therefore particularly interesting for the very different role that organizations in the sector have played over the years in the provision of educational services.

Furthermore, starting around 1996 with the first centre-left government, with Ministers Berlinguer and, subsequently, De Mauro, an intense reformist season took place in Italy in the field of education (Ciarini & Giancola, 2016). Furthermore, education reform can be seen as influenced by the neo-liberal political recipe for responding to the crisis of the welfare state and as part of the composite move towards a post-welfarist state.

In the first paragraph, I present the reasons for the study of the Italian strategies of social investment in education implemented by the new philanthropic organizations, underlying the opportunity to look at promotional interventions for the empowerment of beneficiaries of educational services, at the dynamics of accessibility and the incubation of new entrepreneurial chains linked to childhood education.

In the second paragraph, I introduce the changes that have occurred in the Italian welfare system, which in recent decades has been subjected to intense pressure, due to budget constraints. I will, then, illustrate how the new paradigm of “second welfare” has developed, which allows local third sector actors to carry out social investment initiatives not financed with public funds.

The third paragraph explores the Italian new philanthropic sector, made up of heterogeneous actors with specific characteristics and history. I will explain how the main actors in the Italian context are the granting foundations, which contribute to the well-being of citizens through the provision of grants, scholarships, subsidies, etc.

In the last paragraph, the reforms of the Italian educational system are presented, highlighting how this policy-scape has changed in recent years, due to private sector organizations increasingly involved in

the design, development and implementation of policies and the state playing a key role in the process of “destatization” (Jessop, 2002) of education policy.

#### **4.1 Why study the Italian strategies of social investment in education?**

In this initial section, I discuss why study social investment in education governance in Italy. Primarily, the Italian educational system focuses on issues such as upskilling and the decrease of early school leaving, which have become urgent and inevitable. Hence, in Italy there is a lack of research on the participation of new philanthropic actors in the definition of social investment strategies in education. Only a few studies are designed in a national framework and they do not analyze how social investment programmes in education are planned within the European policy landscape. Thus, a better understanding of education social investment strategies in Italy in a European framework can contribute to the field of policy research, not limited to the national context. Moreover, different research directions could be explored through the study of Italian social investment strategies in education. Firstly, by abandoning the traditional idea of research on the welfare and social protection system and, secondly, looking at promotional interventions, space could be possible left for the study of the dynamics of empowerment of beneficiaries of public services (Maino, 2017).

Therefore, the study of the Italian context of social investment in education represents an opportunity to deepen the measures implemented to broaden the accessibility of educational services, support demand and increase the sustainability of service management and the incubation of new business chains linked to childhood education and care (ECEC) (Ferrera, 2020). Moreover, in Italy the importance of ECEC is not only linked to its role in facilitating work-life balance, but also to the fact that it is fundamental in stimulating skills, abilities and talent in early childhood and breaking the circle of educational poverty.

Finally, the interpretation of the Italian case reveals a disordered scenario, whose form and dynamics are the result of processes of policy borrowing and the clash between old and new discourses that have entered the education debate (Grimaldi and Serpieri, 2010). The analysis of these dynamics could be considered as a tool to allow, in a managerial point of view, to increase the intervention capacity of the public administration in the field of education through the establishment of synergies between new philanthropic actors belonging to different economic and social fields (Maino, 2017).

#### **4.2 The emergence of the second welfare in Italy**

In the following sections, I discuss the interaction between public bodies and local private actors in innovative forms of collaboration in providing services in Italy, in the framework of the emerging “second welfare”. I also explain how its implementation reflects the theories of social investment introduced in

the previous chapter, which consider the interaction between actors from the public, private and non-profit sectors.

The collaboration between actors from different economic and social spheres as a peculiarity of the country is therefore underlined. Furthermore, as explained throughout the paragraph, Italy represents a fitting example of an alliance between organizations from the profit and non-profit fields, aiming at the implementation of social investment strategies in education within heterarchies.

Finally, in the paragraph I present the involvement of the so-called “second welfare actors” in the planning of anti-poverty policies, exercising the role of facilitators of innovation and guarantors of social rights in the light of the reallocation of tasks which until a few decades ago were state domain.

#### 4.2.1 The second welfare engaging local actors in the public sector

The Italian situation of low employment and growing poverty has internal roots (Hemerijck & Ronchi, 2020). Furthermore, the consolidation of public budgets in recent years has greatly reduced the space for investment in social services (Ciarini & Reviglio, 2020) with the consequence of an ever-growing gap between infrastructure provision and social needs. In the Prodi report<sup>5</sup> on social infrastructures, the Italian gap of fixed investments is estimated at 142 billion euros by 2030.

**Table 4.1 Italian estimated investment gap for social infrastructures 2018-2030, billion euros**

Sector	Current investments	Annual gap
Education and lifelong learning	65	15
Health and long-term care	75	70
Housing	28	57
<b>Total</b>	<b>168</b>	<b>142</b>

Source: based on Fransen, del Bufalo & Reviglio (2018).

<sup>5</sup> A 150 billion EU investment plan was presented by Romano Prodi in 2018, to close the investment gap in social infrastructure and increase investments in the health, education and construction sectors in the next 10 years.



As in many other European countries, in Italy the welfare state is subjected to intense and conflicting pressures. The first pressure comes from budget constraints. The second pressure is connected to the rapid changes in social needs, especially in the increasing of the so-called “new risks”: job insecurity, obsolescence of human capital, social exclusion, difficulty of conciliation between work and family responsibilities, etc. (Ferrera & Maino, 2011). Moreover, with the outbreak of the Covid-19 health crisis and the new economic recession, European welfare systems are facing an almost unprecedented reorganization effort. However, in Italy, the measures to combat poverty, before the pandemic with the Citizenship Income and then in full health emergency with the Emergency Income, have made it possible to reduce the consequences of otherwise devastating social impacts (Ciarini & Mariano, 2020).

Italy in recent years has also been characterized by the structuring of a significant synergy between new private actors and innovative forms of collaboration and coordination (Agostini, 2017) in the implementation of social policy. Nevertheless, in many respects it would appear to be a country resistant to a social investment agenda, due to the need for economic policies incorporating social and policy objectives capable of producing direct and indirect economic impacts (Ciarini & Mariano, 2020).

#### **4.2.2 The dynamics of the second welfare**

From 2010 onwards, a new paradigm has made its way into the public debate in Italy: the second welfare (Maino, 2017). The journalist Di Vico defined the second welfare in the newspaper *Corriere della Sera* as a mix of social protection and non-public investment programs, provided by a wide range of economic and social actors, connected in networks with a strong territorial anchorage, open to trans-local discussion and collaborations (Corriere della Sera website<sup>6</sup>).

The second welfare refers to a set of social investment initiatives not financed with public funds and provided by private actors operating in networks characterized by a strong territorial fixation, complementing and integrating public measures and welfare policies (Maino & Ferrera, 2013). Thus, the second welfare is a varied set of interventions which, offering a mix of protection and social investment, through the contribution of private resources provided by actors involved in territorial networks, intends to offer responses to unsatisfied social needs. Furthermore, in Italy the second welfare progressively goes hand in hand with the first public and compulsory welfare state (Maino, 2021).

The second welfare investments are made by both profit and non-profit organizations, such as companies, insurance firms, trade unions, funds, foundations, voluntary associations, cooperatives and social enterprises, which are able to offer a wide range of social programs and interventions to address citizens' risks and needs. Moreover, second welfare organizations do not intend to replace the actions guaranteed by the first welfare with private spending but, on the contrary, they aim to mobilize additional resources through subsidiary actions to traditional state interventions. These financial, organizational

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<sup>6</sup> [https://nuvola.corriere.it/2010/06/15/il\\_welfare\\_dei\\_privati\\_che\\_sos/](https://nuvola.corriere.it/2010/06/15/il_welfare_dei_privati_che_sos/)

and human resources therefore allow private actors in the development, management and provision of social services (Ferrera & Maino, 2014) and are able to transform them from “antagonists” into “allies” in the process of renewing of the welfare system.

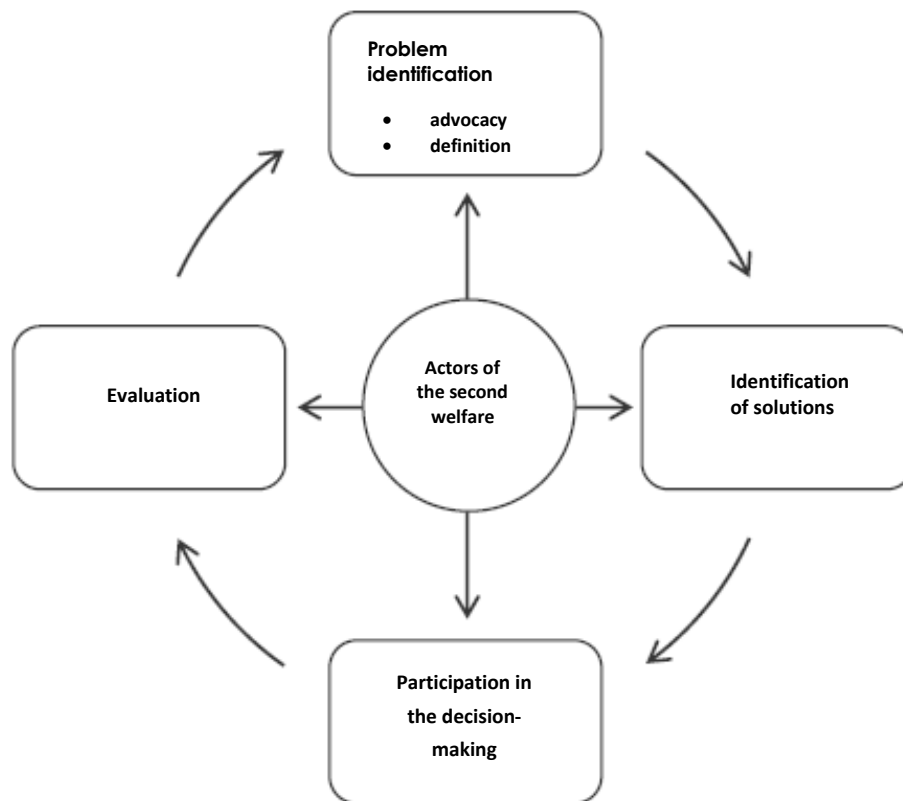
The first welfare should then be included in the mandatory supplementary social protection regimes that cover the risks of existence relating to health, old age, unemployment and disability and provide services considered “essential” for a decent survival and proper integration into the community (Ferrera & Maino, 2011). This “old” welfare is not questioned in its basic functions in terms of social protection but is integrated with the contribution of non-public entities. In recent years, this contribution has grown in economic, financial and employment terms, and today it has a very significant impact on the living conditions of Italians, reflecting its potential at the local level (Maino & Ferrera, 2015). Furthermore, the second welfare had demonstrated, in response to the crisis of 2008, that it plays an important role in integrating the first welfare to respond to social needs, recognizing them and providing solutions (Maino, 2021). In conclusion, the first and second Italian welfare systems should not be seen as distinct compartments, but as two intertwined spheres that merge depending on the policies and areas of need.

#### **4.2.3 The contribution of second welfare actors to social investment policy-making**

Second welfare actors increasingly contribute to national policies by fueling political and cultural attention on specific themes, identifying and defining problems, developing solution proposals and evaluating interventions (Agostini, 2017). Due to their skills in the social innovation sector, second welfare actors are called to take up a double challenge: to play together the role of facilitators of innovation and to be guarantors of existing and emerging social rights (Maino, 2017). Furthermore, since the 1990s welfare interventions have mostly been limited to the implementation of policies in a context of outsourcing by the public administration. While, in recent years, the role and involvement of second welfare organizations has become more complex. Today they intervene in all phases of policy-making (Agostini, 2017).

Local partnerships between public and private actors appear, in fact, to be the most suitable way to support attempts to solve problems not adequately covered from the standard offer of policies, and are aimed at identifying new models of regulation and production of public goods (Maino, 2015). On a governance level, therefore, local organizations are increasingly called upon to take on a coordinating role between various stakeholders, establishing innovative relationships between who can plan, finance and deliver social services. Finally, moving towards these innovative systems of actions is necessary to overcome an approach focused on the mere provision of services and promote the empowerment of beneficiaries by an increasingly individualized strategy, especially of those who find themselves in vulnerable conditions (Maino, 2017).

**Figure 4.1 The contribution of the second welfare actors to anti-poverty policies**



Source: based on (Agostini, 2017).

### **4.3 Contextualizing Italian new philanthropy**

The following sections deepen the role of Italian new philanthropic organizations within the growing financialization of the welfare, and the consequent emergence of venture capital investments in service provision. The paragraph also discusses how, at the same time, new philanthropic actors build governance networks based on dynamics of participation and solidarity to contribute to the well-being of citizens.

Furthermore, the sections deepen the emerging trend of the financialization of Italian welfare state, understood as the infiltration into welfare of actors and practices of the financial world (Caselli & Rucco, 2018) and the new central role played by banking foundations, operating through disbursements that connect private, public and non-profit organizations in addressing social problems and contrast poverty.

Finally, the last section of the paragraph presents the recent measures introduced by the Reform of the Third Sector, which recognized for the first time in Italy the leading role of new philanthropic organizations in the provision of services to citizens.

### 4.3.1 The state of the Italian new philanthropic organizations

In Italy, the new philanthropic sector is made up of a heterogeneous panorama of actors with specific characteristics, history and methods of intervention. The main actors within this panorama are the granting foundations, which contribute to the well-being of citizens through the provision of contributions (grants, tenders, scholarships, subsidies, etc.). The territorial distribution of granting foundations sees a greater presence in the centre-north. This localization, however, does not reflect the distribution of social needs, which are spread across the national territory in a more heterogeneous way.

As stated in the report by Italia non profit (2021) entitled “The state of philanthropy in Italy” (Lo stato della filantropia in Italia), the total amount of donations in 2021 is 8 billion euros. The report also underlines how the logic of collaboration between new philanthropic organizations and beneficiaries of the disbursement has changed, translating the flow of donations into a concrete exchange. Therefore, the new philanthropic exchange is configured as a model in which the organizations express network and philanthropic relationships. In this context, the dichotomy between supply and demand is overcome by a network logic, where all the actors are connected to each other by dynamics of co-planning, shared understanding of needs and definition of actions based on common values. Furthermore, non-profit organizations become partners of the public administration for the management of public resources, making the public space occupied not only by individuals but by a composite community of actors. As declared by the founder of Italia non profit, Giulia Frangione:

“The country is changing as well as the third sector, philanthropy and solidarity [...] A system that is richer in relationships and faster and more efficient is able to attract more donation behaviours and investments.” (Vita website<sup>7</sup>).

In Italy, in recent years, donation procedures have also changed requiring transparency and traceability of the activities carried out.<sup>8</sup> As stated by Carola Carazzone, general secretary of the Association of Foundations and Granting Entities, (Assifero, Associazione Italiana delle Fondazioni e degli Enti di Erogazione):

“Foundations and philanthropic entities have become more visible. There has been a rapid growth in the number and types of philanthropic entities which today are increasingly recognized as key social actors.” (Vita website<sup>9</sup>).

As she also explains:

“We have to move from an individual institutional vision to a systematic vision, to intersectionality, to strategic partnerships between different actors.”

Hence, the use of the financial leverage allows to multiply limited resources to achieve greater outcomes. Thus, Italian “new philanthropy” is diversified, global, collaborative, but above all entrepreneurial, providing for the measurement of both economic and social results (Bengo & Ratti,

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<sup>7</sup> [Vita.it - Il portale della Sostenibilità sociale, economica e ambientale. La voce del non profit](http://www.vita.it)

<sup>8</sup> Excerpt from the conference “La Nuova Filantropia: Economia e diritto per una società digitale collaborativa” organized by the Catholic University, department of lifelong learning. Piacenza, 2 December 2015.

<sup>9</sup> <http://www.vita.it/it/article/2019/06/14/filantropia-istituzionale-superiamo-lassociazionismo-di-categoria-per-151905/>

2014). The elements involved in the transformation of Italian new philanthropy are introduced in the Table 4.2.

**Table 4.2 Elements of transformation of philanthropy in Italy**

<b>Traditional philanthropy</b>	<b>New frontiers philanthropy</b>
Foundations and individual investors	Institutional investors
Operating income	Capital investment
Disbursement	Various financial instruments
Non-profit	Non-profit and social enterprises
Limited leverage	Exploitation of the financial leverage
Focus on output	Focus on results and metrics

Source: based on (Bengo & Ratti, 2014).

**4.3.2 The financialization of Italian welfare**

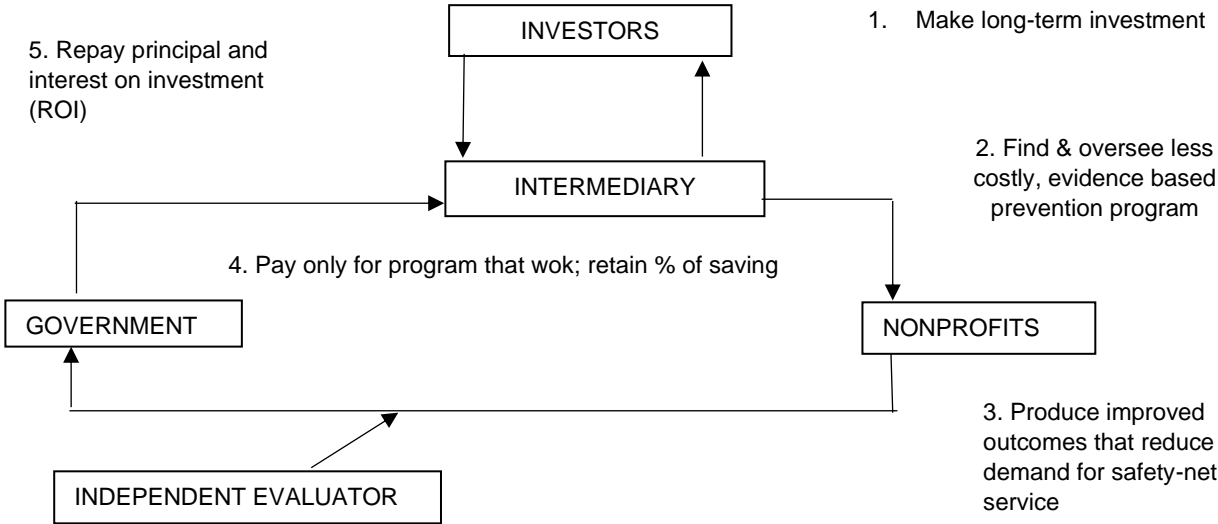
The financialization of welfare refers to the penetration into the world of welfare of actors, values, languages, tools and practices of the financial world (Caselli & Rucco, 2018). In Italy, in recent years attempts have been made to develop new financial instruments dedicated to the third sector. The economic growth of the non-profit sector therefore, has not left the banking segment indifferent, which has organized to meet the needs of third sector organizations (Bandera, 2013a), despite the fact that most third sector organizations prefer to resort to forms of financing by its members, such as fundraising initiatives or disbursements from public and private institutions (Bandera, 2013b).

Moreover, the development of an alternative social impact economy is acquiring an increasing central role in the political agenda. In this redesign of the financing infrastructures for philanthropic organizations, specific instruments need to be considered (Chiodo & Gerli, 2017). Impact investing represents, in fact, a new approach to investment activity, which envisages investments in economically sustainable companies, entities and financial instruments, able to respond to social challenges and at the same time to remunerate the invested capital. This is a new approach to investing, which can be achieved with different instruments, such as equity and investments in real assets (Fondazione Cariplo, 2022a).

Initially introduced in the United Kingdom and subsequently promoted in other European countries, including Italy, the Social impact bonds are forms of private investment in the social sector aiming to guarantee a return on invested capital through the reductions in expenditure produced by the projects financed in partnership with the administrations (Hemerijck & Ronchi, 2020). In some European member states, banks have launched procedures of savings collection in the form of social bonds to finance third sector organizations. Similarly, more complex financial partnerships, such as Social Impact Bonds, have begun to spread.

Furthermore, the approach introduced by the Social Impact Bonds can foster for holistic, collaborative community development because it brings together organizations that often work in isolation and encourages client service that can better lead to outcomes (Costa et al., 2014). Social Impact Bonds therefore, are non-ordinary bonds and provide a remuneration for investors only if a certain social impact established in advance is achieved. By attracting private financial capital to subsidize a social service, Social Impact Bonds envisage a “real bet”, between those who mobilize capital in search of returns and those who need to finance a social benefit or a project, without however having the necessary economic coverage (Hemerijck & Ronchi, 2020). They also show how the entry of financial capital into the funding of social services has as its main effect the subjection of social protection to financial logic (Dowling, 2017).

**Figure 4.2 Social impact bond model**



Source: based on (Costa et al., 2014).

However, the social impact investment market, understood as the set of subjects, products, rules and infrastructures aimed at making investments that produce a positive and measurable social impact as well as an economic return, is characterized in Italy as a young market. A necessary consideration, linked to the specific characteristics of the Italian social and legal context, is therefore the need to involve the banking system in the process of corporate financing. This consideration is based on two main reasons. First of all, Italy is a country which boasts one of the most structured banking systems.

Secondly, In Italy banks represent the main form of channeling private savings and, therefore, can be seen as a powerful vehicle for the distribution and placement of financial products with social impact among private customers (Costa et al., 2014).

Furthermore, the funding of social infrastructure, for example in education, has been subject to a process of financialization through the development of the so-called projects of PPPs. Several Italian banks have launched in recent years corporate bonds for raising capital to be allocated in the form of subsidized loans or contributions to third sector bodies (Ciarini, 2018). For example, in 2007 Fondazione Cariplo created the TT Venture Fund aimed at supporting high-tech projects born from university spin-offs in joint ventures with consolidated companies. Or in 2010, the foundation promoted and subscribed the first fund dedicated to international microfinance, with a commitment of around €70 million.

#### **Box 4.1 Social bonds to fund educational projects in Italy**

The Deposits and Loans Fund (Cdp, Cassa Depositi e Prestiti) has launched a social bond on the Italian Stock Exchange Market in 2019. The bond, intended for institutional investors, has a nominal value of €750 million for a duration of seven years.

The resources collected with the bond will be used for the construction, renovation, safety and anti-seismic adaptation of publicly owned school buildings of all levels and for urban development.

As regards the type of investors, 54% of subscribers is represented by banking institutions, 25% by investment funds and management companies, 15% by insurance companies and the remaining 6% by central banks and other investors.

The impact estimated is the result of three effects:

- direct effects, connected to the increase in demand;
- indirect effects, linked to the activation processes that each sector produces on the other economic sectors;
- induced effects, deriving from additional income flows that stimulate growth of final consumption (Keynesian multiplier).

Source: [https://www.cdp.it/sitointernet/it/social\\_bond\\_2019.page](https://www.cdp.it/sitointernet/it/social_bond_2019.page)

### **4.3.3 The contribution of banking foundations to the fight against poverty**

In the context of the economic crisis, increasingly Italian banking foundations are promoting experimental interventions in the fight against poverty: in most cases these measures are not limited to support income or the provision of material goods, but they are oriented towards the promotion of autonomy and activation of the beneficiaries of the disbursements (Agostini & Cibinel, 2017). Banking foundations possess skills, organizational structures and financial adequate resources to integrate the welfare measures guaranteed by a public sector which is increasingly unable to respond coherently to new risks and emerging needs of society. They are therefore able to guarantee disbursements for the development of the territories, offering support to non-profit organizations and public institutions in the promotion of public utility initiatives (Bandera, 2013b).

In the first half of the 1990s, the transformation of savings banks envisaged by the Amato-Carli law of 1990 led to the birth of banking foundations and a radical change in the Italian non-profit sector. Moreover, at that time, the Italian non-profit sector represented by foundations was made up of a few entities of modest financial dimensions. With the advent of banking foundations, mainly dedicated to the disbursement of large assets, the sector of granting foundations has become more relevant, so much so that banking foundations today represent the most patrimonial Italian foundations (Barbetta, 2008).

For example, the Fondazione Cariplo, in the latest mission budget for the year 2021, declared that the scenario generated by the COVID-19 pandemic makes it necessary to adopt a method of action based not only on the delivery capacity that the individual actor can express, but also on the connective and aggregative capacity of the subjects and forces of the territory. In this context, the method of action becomes: identifying priorities; converging on those together with others creating a flywheel effect that amplifies and multiplies the potential of the initial resources. As stated in the mission budget (Fondazione Cariplo, 2022b):

“The notion of resources must therefore be understood in a broad sense, including not only economic ones, but also the ability to create partnerships, generate talent, produce knowledge, build relationships and, in general, spread the experience of the foundation as a capable model to help other philanthropic entities to better pursue their goals.” (p. 21).

Finally, partnerships involving banking foundations, public, private and non-profit partners, have given rise to innovative experiences to address emerging challenges at the local level and, in some cases, at the national level. Banking foundations, in fact, with the aim of connecting organizations that would not collaborate independently, see in their ability to network the lever to support social innovation, understood as actions capable of tracing new paths to address problems (Agostini & Cibinel, 2017).



#### **Box 4.2 The Fondazione Cariplo Program for the fight against poverty**

The Program for the fight against poverty (Programma contrasto alla povertà), launched in the second half of 2020, is implemented in collaboration with the community foundations (foundations that develop on the initiative of institutional, economic and non-profit entities of a specific territory to improve the quality of life of the community in which they arise) and is divided into two lines of intervention:

- activation of funds to contrast poverty and simultaneous launch of fundraising territorial activities;
- promotion of public-private networks and territorial co-planned initiatives.

Faced with the crisis generated by the Covid-19 pandemic, Fondazione Cariplo has decided to support 16 community foundations in the fight against emerging poverty. In the two-year period 2020-2021, the community foundations have financed a total of approximately €9.8 million, of which €4.3 million made available by the Fondazione Cariplo (€1.59 million in 2021).

The funds have the purpose of:

- stimulating a local agenda focused on the phenomenon of poverty;
- building local alliances to deal with the problem of poverty;
- mobilizing donations, widely and capillary;
- sensitizing the local community (citizens, organized civil society, business) on the social implications of the COVID-19 emergency in terms of growing poverty;
- supporting countermeasures poverty created by territorial networks.

As regards specifically educational poverty, Fondazione Cariplo has disbursed an amount of €15,613,135.40 in 2021 to the Fund for the contrast of educational poverty of minors.

During 2021, Fondazione Cariplo also collaborated with the Italian bank Intesa Sanpaolo to offer disadvantaged students 3,650 personal computers and 200 tablets equipped with the technical requirements to manage the distance learning. The devices were delivered with Microsoft Office Home & Student 2019 licenses and the Windows 10 operating system that Fondazione Cariplo was able to obtain at controlled prices thanks to participation in the Technology Access Program promoted by the Microsoft Corporate branch (Fondazione Cariplo, 2022b).

#### **4.3.4 The reform of the non-profit sector in Italy aiming participation and solidarity**

Italian civil society, with the third sector composed of associations, cooperatives, foundations and mutuals, has always contributed to the political life of the country. At 31 December 2020, the third sector

organizations in Italy were 363.499<sup>10</sup>, employing 870.813 workers. They were composed mostly by associations (over 308,000 and representing 85% of the total). The driving force of the sector are the social cooperatives which, although representing only 4.3% of the workers, employ over 456,000 people, around 53% of the total. Then there are almost 8,000 foundations with over 102,000 employees and nearly 40,000 “other legal forms” organizations which employ over 138,000 people. Third sector entities are mostly spread in northern Italy with over 182,000 entities, followed by the Center with over 80,000 organizations, the South with over 64,000 organizations and the Islands with 34,000 units.

Furthermore, the Renzi government has proposed a rationalization of the entire sector, approved with the law n. 106 of 6 June 2016 (Polizzi & Vitale, 2017). The Reform of the Third Sector implemented by the Renzi government was carried out:

“in order to support the autonomous initiative of citizens to which they contribute, also in associated form, to the pursuit of the common good, to raising the levels of active citizenship, cohesion and social protection, promoting participation, inclusion and the development of the fullness of the person, increasing the potential for growth and employment.” (Gazzetta Ufficiale della Repubblica Italiana website<sup>11</sup>).

The reform identifies different types of entities: social promotion associations, philanthropic organizations, social enterprises, social cooperatives, associative networks, mutual aid organizations, voluntary organizations, foundations and entities with “other legal form”. Moreover, the general principles of the reform focus on encouraging the broadest exercise of the right of association and the private economic initiative and on guaranteeing the autonomy of the interests involved. Therefore, the Undersecretary of the Ministry of Labour and Social Policies, Luigi Bobba, defined the Reform of the Third Sector as a sign of:

“[...] decisive change in the country, that is, the possibility of having a general regulation of all that complex of activities that arise from free associations, civic volunteering and solidarity carried out by 6 million citizens and more than 300,000 organizations, as many as are affected by the Reform”.

In Table 4.3, I illustrate four main social and political areas relating to the third sector and affected by the reform.

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<sup>10</sup> Data provided by the National Institute of Statistics (ISTAT, Istituto Nazionale di Statistica) as part of the latest 2020 census.

<sup>11</sup> Official Gazette of the Republic (Gazzetta Ufficiale della Repubblica Italiana) is the official journal of the Italian government and the main source of acknowledgment about the Italian law. It promulgates acts of the Italian parliament and Decrees of the President of the Republic, <https://www.gazzettaufficiale.it/eli/id/2016/06/18/16G00118/sq>

**Table 4.3 Key social and political areas affected by the Reform of the Third Sector**

Key areas affected by the Reform of the Third Sector	Changes envisaged by the reform
<p><b>Definition of third sector entities</b></p>	<p>The reform does not define third sector entities only on the basis of their legal form, but also for the activities they carry out in terms of “general interest through forms of voluntary work and free action or mutuality or production and exchange of goods and services (Article 1)</p> <p>Institutional attention shifts from bureaucratic data (the legal form) to considerations of what organizations pursue and do</p>
<p><b>Promotion of investments</b></p>	<p>Possibility for social enterprises to adopt forms of partial remuneration of invested capital, maintaining the prevalent destination of profits for the achievement of the corporate purpose</p> <p>Promotion of the entry into the third sector of low-profit and non-profit entities, and the so-called patient capital characterized by slow remuneration</p> <p>Admission to the boards of directors of social enterprises open to employees of for-profit companies, both private and public</p>
<p><b>Expansion of the voluntary “civil service” for young people aged 18-28</b></p>	<p>Relaunch of the civil service, which in recent years has suffered reductions in funds</p> <p>Increase in resources and number of young people who can benefit from it (from 20,000 to 45,000)</p> <p>Widening of the categories of possible participants (not only young Italians but also foreign residents)</p>
<p><b>Relaunch of forms of support and representation of the third sector</b></p>	<p>Restructuration of the voluntary service centres through the introduction of forms of coordination at the inter-provincial level and regional level</p> <p>Expansion of the role of volunteer service centers to provide support not only to voluntary organizations but to the entire third sector</p>

Source: adapted from (Polizzi & Vitale, 2017).

According to Rizzini and Noia (2017), corporate philanthropy will be able to benefit from the Reform of the Third Sector, which simplifies the rules on the collection of donations. In fact, the reform introduces tax breaks: donations to third sector organizations are now 30% deductible (instead of the previous 26%) up to a maximum of 30,000 euros for each tax period (in the case of donations to voluntary organizations, the rate rises to 35%). As far as companies are concerned, the reform provides for the deductibility of donations in cash and in kind up to 10% of the total declared income and removes the limit imposed by the previous legislation (70,000 euros/year). In addition, the establishment of a single

Register of the Third Sector, monitored and managed by the Regions through a single national platform, aims at covering both an operational and cognitive function. Further knowledge on third sector organizations, in fact, can be found in the register thanks to the obligation for entities to indicate a minimum set of information including object of activity, assets, statute and balance sheets.

Finally, the implementation game of the reform is played out above all at the local level, involving municipalities, metropolitan cities and regions. It is about creating a political and institutional coalition strong enough to keep the resources and legitimacy policy it needs at the top of the government's political agenda. The future of the reform also depends on its acceptance by third sector networks, organizations and individuals as a participatory process of co-production, which brings into play the values of citizens involved (Polizzi & Vitale, 2017)

#### **4.4 The New Public Management and the reforms of the Italian education**

In order to deepen the socio-legal context that has allowed new philanthropic organizations to play a leading role in the provision of public services in Italy, such as education, in the following sections I will focus on the evolution of the Italian educational system and on the reforms aiming at applying the NPM logic implemented in recent decades.

In Italy, in fact, the education reform began in 1997, based on a peculiar mix of relative on-site management, devolution and localism with the aim of overcoming the ineffective welfarist configuration (Grimaldi & Serpieri, 2010). At that time, the entry of private actors into the education arena reflected the ongoing formation of heterarchical networks involving philanthropists, banks, politicians, consultants, universities, academics and professional unions (Barzanò and Grimaldi, 2013).

##### **4.4.1 The neo-liberal reform of Italian education**

From the point of view of social investment in education, the Italian welfare system has been characterized in recent years by cuts in public expenditure due to multiple causes linked to the governance designs and to the choices, not always coherent, followed by various governments (Ciarini & Giancola, 2016). In the Italian educational system, the state still exercises a pervasive influence on local authorities and schools through the control of human and financial resources and the use of its regulatory powers through the definition of standards and the provision of incentives. Furthermore, weak school autonomy coexists with the permanence of a centralized control, exercised through the introduction in the public sector of logics of contractualism and performance management system (Hall et al., 2015).

Moreover, since the Second World War, the Italian educational system has been based on the choice of bureaucracy as the main vehicle of rationalization. Therefore, the Italian state has also been the main provider of public mass education, even if some residual spaces have been left for private schooling, particularly the Catholic schools (Grimaldi & Serpieri, 2013).

Only at the end of the 1990s political stability, the growing crisis of welfare structures and the pressures exerted by the European political agenda on education created the conditions for a reform of the Italian school system. The reform process evolved gradually, and its main features were: site-based management, globalization, localism, emphasis on partnerships and the role of local authorities in education governance (Grimaldi & Serpieri, 2010).

Therefore, since the late 1990s, the Italian educational system has undergone a process of restructuring. The milestones of this process were the introduction of school autonomy and decentralization in 1997 and the controversial establishment of a national evaluation system concerning school, staff and students. In this context, the dominance of the central bureaucracy has been accompanied by increasing forms of controlling and governing the education field, such as “managerialism” and “social partnership” (Landri, 2009, p. 87). However, “all these trajectories are nowadays still ambiguous in their outcomes and characterized by tensions and paradoxes, originated from the clashes of the neo-liberal and neo managerialist discourses and their technologies with the welfarist legacies.” (Barzanò & Grimaldi, 2014, p. 26).

The education reform in Italy began as part of a reorganization process that involved the entire Italian public administration during the 1990s. Following neo-liberal ideas, the restructuring of the educational system has been conducted on the basis of a peculiar mix of site-based management, devolution and localism with the goal to overcome the ineffective welfarist configuration (Grimaldi & Serpieri, 2010). Hence, the strengthening of the regulatory framework placed Italian schools in a complex governance terrain: between the “evaluating state” (which directs policies, moves resources and governs recruitment and assessment), the impulses of the “quasi-market” (with the entry into the decision-making arena of subjects with new roles such as users, families and other schools, understood as school networks), and the horizontal thrust produced by competing schools, associative organizations of the territory and local institutional system (Ciarini & Giancola, 2016).

Starting from law n. 59 of 1997, the centre-left government also shaped the educational system in three years of intense legislative activity. One of the reformers’ goals was to establish a new institutional structure that would guarantee autonomy to each school (Grimaldi & Serpieri, 2010), as one of the main components of the NPM educational tool kit (Verger & Curran, 2014), within the framework of a soft-type of privatization. New spaces of autonomy have thus opened up for schools. Firstly, schools had the right to outline the annual plan of educational provision (*piano di offerta formativa*), within which they could plan school projects, define local curricular priorities and outline their internal organization at least in part. Secondly, schools were strongly encouraged to build partnerships with other public and private actors, in order to pursue their educational mission. In this scenario, partnerships have been explicitly identified as a potential channel through which to obtain public or private extra-resources and enrich the educational offer (Grimaldi & Serpieri, 2010).

#### **4.4.2 The emergence of new philanthropic actors in Italian education**

The corporate engagement in education policy constitutes a globalizing phenomenon (Verger et al., 2019). Moreover, “the participation of the private sector in the delivery of public education is growing internationally.” (Ball & Youdell, 2008, p. 25). The entry of private actors into the education arena also reflects the ongoing formation of heterarchical networks involving philanthropists, business, charitable organizations, banks, politicians, civil servants, national and international institutional agencies, experts, consultants, universities, academics and professional unions. In Italy, since 2008 these new policy entrepreneurs have been acquiring a growing centrality in education policy-making (Barzanò and Grimaldi, 2013). Therefore, the public space has expanded to include new philanthropic organizations, which have taken centre stage in policy-making. In this context, new arrangements of networks and markets offer a fruitful approach to investigate the alliances between public and private sectors in education (Mincu, 2020).

Privatization models are also influenced by the particularities of the specific national context, such as: the political structures and culture of the nation state; traditions of democratic, dispersed or centralized government; the extent of existing educational provision. These “path dependencies” are important in appreciating the differences between countries in terms of the extent or speed of adoption of forms of privatization and the degree of resistance to such take up (Ball & Youdell, 2008). Today, in the Italian governance of education, philanthropic actors play the role of new policy entrepreneurs, embody a new set of knowledge, strategic skills and interests, acting as networkers, negotiators, disseminators and bearers of discourses drawn from the regime of practice of the private sector. Private actors also employ apparently fair discursive entry points, such as quality, improvement, meritocracy and effectiveness, to legitimize their involvement in education policy (Grimaldi & Serpieri, 2013).

Furthermore, the rise of the third Berlusconi government from 2008 to 2011 has represented a landmark in the wide process of change of the Italian educational system, boosting what has been called the “merit turn”. In this context, a public campaign was launched in 2008 declaring the inadequacy of the Italian educational systems, aiming to implement meritocracy. Merit was conceptualized as the valuing of excellence, regardless of any socio-economic and cultural background. Within such a discursive frame, education has been assigned a key role as the institutional agency responsible for a merit-based selection. At the same time, the educational system was blamed as non-meritocratic. A set of recipes was identified to solve the problem. These measures included the establishment of national standard tests and the introduction of NPM evaluation and accountability technologies for schools (Barzanò & Grimaldi, 2014).

#### **4.4.3 Educational poverty in Italy**

Italy is characterized by high rates of early school leaving. Even though in the period 2011 – 2020 the country significantly reduced its rate (going from 18% to 13.1%), the European objective of bringing

early school leaving below 10% was not reached. Furthermore, in 2020, this rate was the highest in Europe after Spain, Malta and Romania (Openpolis, 2020), with marked territorial differences. Although all regions have reduced the phenomenon of abandonment, and some have reached, or are close to, the European target of 10%, many are still far from this goal, especially in the South. However, since its implementation, the Italian Constitution has guaranteed education in situations of need. In fact, as the article 2 states:

“The Republic recognizes and guarantees the inviolable rights of the person, both as a single person and in the social groups in which the human personality is expressed. The Republic expects that the fundamental duties of political, economic and social solidarity are fulfilled”.

Furthermore, the article 3 declares that:

“All citizens have equal social dignity and are equal before the law, without distinction of sex, race, language, religion, political opinion, personal and social conditions. It is the duty of the Republic to remove those obstacles of an economic or social nature which hinder the freedom and equality of citizens, thereby impeding the full development of the human person and the effective participation of all workers in the political, economic and social organization of the country”.

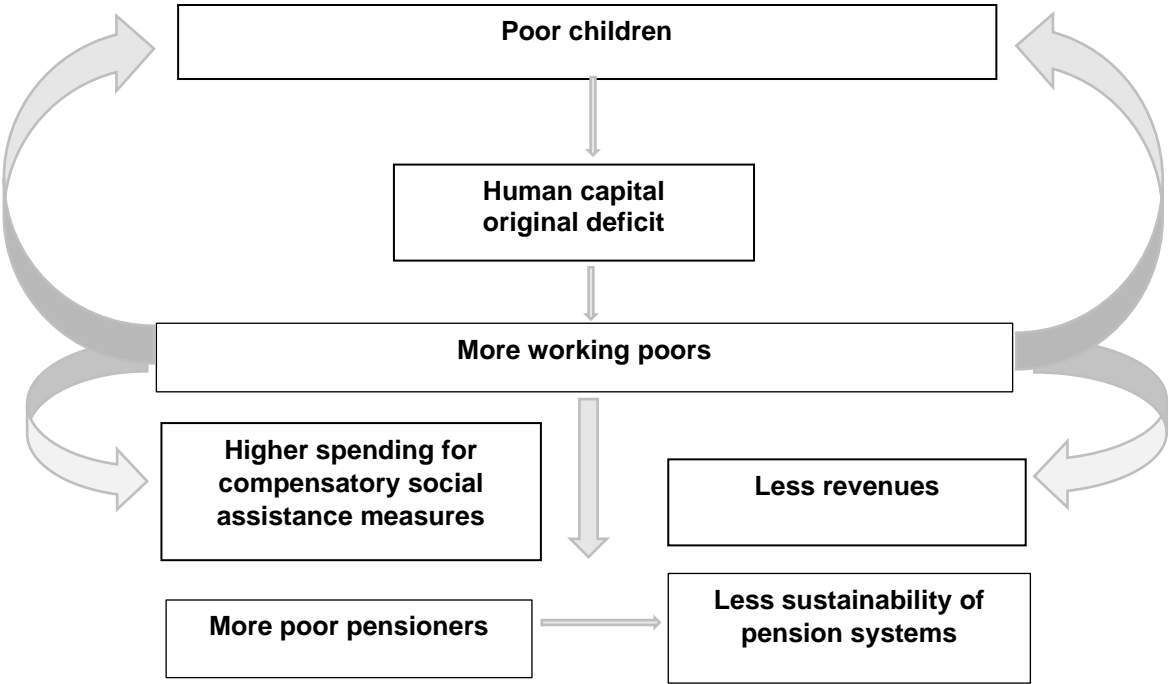
As explained in the recent report by Openpolis, the observatory on educational poverty created by the social enterprise Con i Bambini, entitled “The PNRR and the educational poverty”<sup>12</sup> (“Il PNRR e la povertà educativa”) educational poverty can be defined as the condition in which a child or adolescent is deprived of the right to learn, understood in a broad sense. Therefore, educational poverty is a multidimensional concept that refers to a correspondence between material poverty, social exclusion, marginalization and total or partial lack of formal education. In a broader perspective, it is related to educational deprivation in various forms, such as school dropouts, academic difficulties, failure to achieve essential levels of competence, limited access to educational opportunities, etc. The concept also includes different dimensions depending on both material, relational and cultural aspects. Moreover, according to a general meaning, the condition of educational poverty is determined by a series of factors which, individually or jointly, prevent an individual from being able to fully learn and develop skills and talents, as well as limit the expression in the various contexts of daily life. These limitations also affect the social skills that enable individuals to maintain high living standards (Engle & Black, 2018).

Between poverty understood as material deprivation and educational poverty there is a vicious circle that feeds in both directions. In fact, being materially poor increases the risk of being educationally poor and vice versa. An unfavourable starting condition therefore can have long-term effects because children who are denied the opportunities to learn risk becoming excluded (Crouch, 2020).

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<sup>12</sup> <https://www.openpolis.it/esercizi/il-ruolo-del-pnrr-nel-contrasto-della-poverta-educativa/>

**Figure 4.3 The vicious circle of child poverty**



Source: based on (Ferrera, 2010, p. 11).

Finally, educational poverty mainly affects those students for whom education instead should represent an important channel of emancipation and social mobility. The Italian school, therefore, does not actually act as a vehicle of social mobility, but rather crystallizes existing inequalities by contributing to their intra- and intergenerational reproduction (Percorsi di Secondo Welfare, 2022).



#### **Box 4.3 The social enterprise Con i Bambini managing funds against educational poverty**

“Con i Bambini” is an organization created to implement the programs of the Fund for the contrast of educational poverty of minors, established in 2016 through an agreement protocol stipulated between the President of the Council of Ministers, the Minister of Economy and Finance, the Minister of Labour and Social Policies and the President of ACRI, the Italian association of foundations and saving banks.

Con i Bambini is a sort of “operating arm” through which project tenders are issued and economic resources disbursed. There are many thematic areas in which Con i bambini contributes to the provision of the Fund for the contrast of educational poverty of minors, the most important are linked to the following tenders: Early childhood 0-6 years old (Prima Infanzia 0-6 anni), Teenagers 11-17 (Adolescenti 11-17), New Generations 5-14 years old (Nuove Generazioni 5-14 anni), One step ahead (Un passo avanti), Sew up dreams (Ricucire i sogni), Change life (Cambio rotta), With open arms (A braccia aperte), A possible tomorrow (Un domani possibile), Not one less (Non uno di meno), I'm restarting from scratch (Ricomincio da zero) (Borzaga & Musella, 2020).

To date, more than 600 projects have been selected by Con i Bambini, for a total contribution of over €380 million. The interventions involve over half a million children and young people together with their families. In the projects, more than 8,500 organizations have been involved (third sector entities, schools, public and private bodies) to strengthen the educational system.

The projects supported the fight against educational poverty in different forms: lack of nursery schools and childcare services, early school leaving, juvenile delinquency, child abuse, youth discomfort, etc.

#### **4.4.4 The implementation of the Fund for the contrast of educational poverty of minors**

The contribution of the actors of the second welfare is significant in the fight against educational poverty. The Fund for the contrast of educational poverty of minors was created thanks to an initiative of banking foundations which, on the occasion of the 2015 ACRI congress, committed to intervening in support of children and in combating new forms of poverty (Agostini, 2017).

In 2016, ACRI promoted a national initiative aiming at increasing the offer of qualified educational initiatives for disadvantaged minors, in order to break the vicious circle of educational poverty. Both

representatives of the third sector and the Italian government accepted to implement the Fund for the contrast of educational poverty of minors within the framework of the national budget law. The objective of the fund is to support interventions aimed at removing obstacles of economic, social and cultural nature that may hinder minors from fully enjoying educational processes.

Regarding the interventions to fight educational poverty in Italy, to date, foundations have credited to the fund over €360 million. Until the end of 2021, the fund has supported over 400 projects with around €335 million of expenditure. The beneficiaries of the projects are over 500,000 disadvantaged children across Italy. Until now, the initiatives have involved about 7,150 public and private organizations such as associations, social cooperatives, schools, universities, research entities and local public administrations.

At the basis of the initiative there is the conviction that the issue of educational poverty cannot be an exclusive responsibility of public schools. It must be considered as a problem of the entire educating community. Educating communities can be defined as the ecosystems that accompany every minor in the educational path. They involve a plurality of local actors and relationships, such as the school and the set of interactions between students, teachers, families, school staff, school leaders, and public authorities. The educating community is also made up of private subjects who support the students' learning process, for example associations, libraries, museums and training agencies financed by public and private bodies, such as associations, foundations, social enterprises, cooperatives and voluntary organizations (Openpolis, 2022). Moreover, from an operational point of view, the fight against educational poverty has resulted in the request for tenders for the creation of broad partnerships involving public and private actors of a community. In fact, as the general director of ACRI, Giorgio Righetti, explains:

“The Fund for the contrast of educational poverty of minors is a concrete example of effective cooperation between the public and private sectors, and this cooperation is based on solid foundations of mutual trust, on the valorization of the skills and specificities of each partner and on a highly result orientation. If the various parties involved do not seek visibility or leadership, but focus exclusively on the pursuit of shared objectives, making available the resources and skills that each one has, in an equal and sharing relationship, then the result can only arrive. This initiative represents a concrete reference model for system interventions that intend to address complex issues where the community, in its many expressions, is the solution.”<sup>13</sup>

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<sup>13</sup> Source: interview to the general director of ACRI dated 14<sup>th</sup> December 2020, published on the online magazine Vita, dedicated to social reporting, volunteering, economic and environmental sustainability.

#### **Box 4.4 Community foundations supporting access to digital technologies**

As part of the Program to combat poverty, and in relation to territorial co-planning to combat educational and digital poverty in Italy, three projects were launched in 2021 by the community foundations of the cities of Brescia, Bergamo and Lodi, in the Lombardy region.

The projects, also supported by the Fondazione Cariplo and the social enterprise Con i Bambini, thanks to the resources of the Fund for the contrast of educational poverty of minors, aim to favour young people in conditions of fragility in accessing to digital technologies. In the first year of implementation, the initiatives led to the distribution of personal computers to the most disadvantaged students and the strengthening of digital infrastructures in schools in Brescia, the creation of a dedicated platform and the opening of community spaces for digital education in Bergamo and the implementation of procedures for taking charge of children and families in difficulty in Lodi (Fondazione Cariplo, 2022b).

#### **4.5 Conclusion**

In this chapter, I have analyzed processes of privatization and financialization as part of a wider transformation of the deeper texture of Italian education depending on the intertwining between the translation of policy ideas drawn from the globalized education policy-speak and the political and socio-cultural peculiarities of the Italian education field (Grimaldi & Serpieri, 2013). Furthermore, as explained throughout the chapter, discursive tensions in Italy take the form of struggles between managerialist accountability and performance control on the one hand, and welfarist arrangements on the other. They are also manifested in struggles between democratic and progressive discourses regarding education and discourses of marketization (Grimaldi & Serpieri, 2014).

As also observed in the chapter, the Italian welfare state today does not appear capable to meet all the needs expressed by citizens in various social and economic fields. In this scenario, the most promising strategy for coping the structural crisis of the Italian welfare state seems to be to combine the first welfare with the second welfare fueled by non-public resources. Hence, as explained in the chapter, many can be the financiers and protagonists of the second welfare, from the profit or non-profit sector. For example, banking foundations are playing a leading role in promoting the trans-location. It is also desirable today to move forward in this debate, identify a basis of shared objectives and practices and formulate together concrete proposals for change, in order to engage and motivate not only the direct involved stakeholders, but more generally the local and national politicians, thus like public opinion across the country (Ferrera & Maino, 2014).

## **Conclusion of the first part**

In the first part of the thesis, the theoretical framework, methodology and fieldwork of the study were introduced. As underlined in chapters 1 and 2, I focused on the concept of network, as a form of governance that interlinks market and hierarchies and represents policy relations between actors in the field of social investment in European education.

The methodology of the research has been introduced, referring to the network ethnography involving internet searching, network mapping, interviewing and observing. Therefore, I explained how I used network ethnography to follow policy and achieve a suitable understanding of processes of intermediation through which various forms of policy mobility take place.

Moreover, I underlined how networks resources are exchanged between new philanthropic organizations which try to lead the modernization of the educational system through global economic imperatives, offering consultations, research and advice, with the aim of doing good and financially well at the same time, opposing self and collective interest.

I also explained how, in this context, the moralization of investment in various field, such as education, has also led a new generation of donors to finance large-scale projects focused on solving “wicked” social problems, in the new economic trend of philanthrocapitalism. I then provided clarifications on the Italian situation in terms of venture philanthropy, illustrating the legislative measures that have allowed the rise of new philanthropic investments in the country, such as the Reform of the Third Sector.

Finally, I highlighted the growing financialization of Italian welfare, understood as the increasing use of financial instruments to solve the problems of state education, characterized by inefficiency and resistance to innovation. The creation of a second welfare at the local level was therefore introduced, involving new philanthropic organizations and illustrating the prominent role of Italian banking foundations in the implementation of innovative projects in education.

## **Part II**

### **Social investment strategies in European education: an analysis of the policy-scape**

## Introduction of the second part

The second part of the thesis deepens the social investment strategies to advocate for education that will be further illustrated in Chapter 10. In fact, four different advocacy strategies that new philanthropic organizations adopt have emerged through interviews with employees of these organizations and who took part in the research fieldwork. The advocacy strategies analyzed are: redefining childhood education, improving the quality of the educational system, pursuing educational change and empowering students in digital skills. These four strategies will be introduced in the next three chapters and deepened in Chapter 10.

Chapter 5 presents social investment strategies to redefine childhood education and improve the quality of the educational system. Chapter 6 introduces the advocacy strategy of pursuing educational change. Furthermore, Chapter 7 deepens the last advocacy strategy emerged through the interviews, namely empowering students in digital skills.

Moreover, as explained in the following chapters, all strategies are presented in the light of the Europeanization of education policies. The EU, in fact, has issued several policies to guarantee education, which have then been implemented by the member states, allowing new philanthropic organizations to pursue their social investment strategies in education in a favourable legal context.

The following chapters also refer to the research model introduced in the first part of the thesis (p. 22). In the model, Europeanization is presented as the starting point of the first and second lines of inquiry. The first line of inquiry explores the link between the Europeanization process and new philanthropic organizations through their involvement in European digital education networks. The second one investigates the link between European policies that finance social inclusion projects in education and the implementation of related recommendations in national contexts.

Therefore, following the two lines on inquiry on which the research is based, in the framework of Europeanization, the next chapters present advocacy strategies considering the need to move beyond “methodological nationalism” (Beck, 2006). To address these arguments, the chapters combine the presentation of data collected through the empirical inquiry with some discussions on policy mobilities (Ball, 2016).

Finally, this second part of the thesis highlights how policy space is “configured through the intersection of global and situated elements” (Ong, 2007, p. 5), since intersectional agents establish interactive relationships with local organizations that reconfigure the processes of policy (McCann & Ward, p. 45).

## Chapter 5

### **Social investment policies to improve childhood education and the quality of the educational system**

This chapter sets the stage for the analysis of social investment policies in education. As anticipated in the introduction of the second part of the thesis, the concept of Europeanization is explained in order to introduce the policy-space in which the new philanthropic organizations mobilize their resources to implement social investment strategies in education.

Furthermore, as will be explored in Chapter 10, redefining childhood education (advocacy strategy no. 1) and improving the quality of the educational system (advocacy strategy no. 2) were central to social investment activities, such as confirmed by the respondents in the interviews during the empirical investigation. Therefore, the focus of the chapter is on advocacy strategies no. 1 and 2, giving details on the activities these new philanthropic organizations undertake to implement them.

The first paragraph illustrates the Italian approach to challenge exclusion in education. Subsequently, according to the research question, which focuses on how new philanthropic organizations promote social investment in European education by mobilizing their resources, relevant policies in the sector are examined, with particular attention to interventions aimed at countering the crucial issue of educational poverty, profoundly affecting the Italian school system.

Finally, the last paragraph of the chapter introduces the context of the Europeanization of the education advocacy, concluding with an analysis of recent European policies aimed at the quality of the educational system.

#### **5.1 Redefining childhood education (advocacy strategy no. 1)**

In order to examine the advocacy strategies developed through the empirical analysis and deepened in Chapter 10, this paragraph examines the measures implemented in Italy to combat social exclusion in early childhood education. The issue of improving the access to nurseries and kindergartens appeared as a core theme in the interviews conducted in this research. In the policy analysis, it also emerged as a central issue of European initiatives focused on education. For these reasons, the following sections will illustrate the Italian policies implemented to improve access to early childhood education in adaptation to European policies in the field.

### 5.1.1 The National Plan of Recovery and Resilience and childhood education

The level of early school leaving, (the share of students who leave the school system without a qualification), while decreasing over time, remains one of the highest in Europe with marked regional differences (Alleanza per l'Infanzia, 2020). Hence, despite some important reforms, the Italian educational system still appears anchored to antiquated processes. In this scenario, the question of equity and the phenomena connected to it, such as those of abandonment, dispersion and underperformance, in some territorial contexts take on particular importance (Benadusi et al., 2020).

The Italian educational system is also characterized by structural lacks in the provision of primary education. Therefore, the ratio between places available in nursery schools and the number of children aged between 0 and 2 in Italy is on average 26.9%<sup>14</sup>, with significant territorial differences. The lack of educational services for children, combined with the unequal distribution of family workloads, reduces the demand for these services, generating a socially inefficient balance, where the scarce supply corresponds to an apparent decrease in the demand for educational offer, especially in the South.

Furthermore, the National Plan of Recovery and Resilience will finance 2,190 interventions for the age group from 0 to 6 years, to create over 260,000 new places in early childhood education throughout Italy. The objective of the interventions is to improve the quality of the Italian school service, promote family and female employment and increase the birth rate, particularly in the southern regions, which will benefit from 54.98% of the resources for nursery schools and 40.85% of those for kindergartens. As stated, in fact, by the Minister of Education Patrizio Bianchi:

"This is the largest plan ever implemented in education for the 0-6 age range, with a total investment of €4.6 billion. The government has worked in recent months and is still working to ensure that the Plan is implemented, meeting all deadlines. We are particularly proud of the result achieved on nursery schools: we managed to allocate all available resources, with a large part of the funding destined for the South. Guaranteeing the right to education of the youngest, throughout the national territory, is a fundamental element for bridging the gap between north and south, removing obstacles to female employment and supporting families with concrete actions." (Italian Ministry of Education website<sup>15</sup>).

The final goal of the interventions is to meet the European target of reaching by 2026, in each member state, at least the 33% of children under 3 years of age having access to early childhood services (Italia Domani website<sup>16</sup>).

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<sup>14</sup> Data from the Italian Institute of Statistics (ISTAT) updated for the 2019/2020 school year, [https://www.istat.it/it/files/2022/09/Report\\_servizi\\_infanzia.pdf](https://www.istat.it/it/files/2022/09/Report_servizi_infanzia.pdf)

<sup>15</sup> <https://www.miur.gov.it/-/pnrr-oltre-3-1-miliardi-per-asili-nido-e-scuole-dell-infanzia-pubblicate-le-graduatorie-bianchi-un-investimento-senza-precedenti>

<sup>16</sup> <https://www.italiadomani.gov.it/it/news/piu-asili-nido-per-ridurre-disuguaglianze-educative-e-di-genere.html>



### 5.1.2 The implementation of the European Child Guarantee in Italy

The European Commission, in the context of the Strategic Framework for European Cooperation in Education and Training (ET 2020 Framework), recognizes the crucial role of early education in equipping all children with the necessary skills to successfully face the challenges that they will encounter in their lifetimes (Alleanza per l'Infanzia, 2020). Therefore, in implementation of the European Child Guarantee, the National Action Plan of the European Child Guarantee (Piano di Azione Nazionale della Garanzia Infanzia) was established within the Italian Ministry of Labour and Social Policies and agreed with the National Observatory for Childhood and Adolescence (Osservatorio Nazionale per l'Infanzia e l'Adolescenza<sup>17</sup>).

The drawing up of the plan was characterized by the involvement of different stakeholders from the institutional sector: Department for Family Policies of the Presidency of the Council of Ministers, Ministry of Education, Ministry of Health, municipalities and Youth Advisory Board, representing the beneficiaries of the interventions (Italian Ministry of Labour and Social Policies website<sup>18</sup>). Therefore, this stakeholder network includes the relationships between consultants and occupying powers (Peck & Theodore, 2015).

In 2020, the think tank Alleanza per l'Infanzia, in collaboration with the network EducAzioni<sup>19</sup>, elaborated a proposal for the use of a significant part of the funds of the National Plan of Recovery and Resilience to improve the quality of childhood education for children aged 0 to 6 and advocate for responsive parenting within 3 years (2021-2023) through various interventions illustrated in Table 5.1.

**Table 5.1 Advocacy actions to redefine childhood education proposed by the Alleanza per l'Infanzia**

Advocacy actions for childhood education	Instruments of action
Public education for at least 33% children from 0 to 3 years of age in each region	General taxation Educational services provided free of charge
Coverage of 95% of free full-time pre-school education for children from 3 to 5 years of age in each region	Promotion of social inclusion, with particular attention for children of non-Italian citizenship
Strengthening of the professional requirements for educators and teachers	Adequate salaries and fair contractual and working conditions Creation of the Poles of Childhood (Poli per l'Infanzia), including Centres for Children and Families (Centri per Bambini e Famiglie )
Definition of specific regional objectives	Regional objectives considered within the framework of the National Plan of Recovery and Resilience

<sup>17</sup> The National Observatory for Childhood and Adolescence coordinates central administrations, regions, local authorities, associations, professional orders and NGOs that deal with childhood.

<sup>18</sup> <https://www.lavoro.gov.it/temi-e-priorita/infanzia-e-adolescenza/focus-on/Garanzia-europea-per-l-infanzia/Pagine/default.aspx>

<sup>19</sup> EducAzioni is an Italian network of actors from active civism, third sector and trade unions, who have advanced proposals to protect the rights of children and adolescents after the outbreak of the global health crisis.

In May 2021, with the document entitled “Contribution to the proposal “National Plan of recovery and resilience” (Doc. XXVII, n. 18)”, Alleanza per l’Infanzia also responded to the request of the Commission of the Senate for Public, Private and Social Security to provide a contribution of ideas on the National Plan of Recovery and Resilience (Italian Senate website<sup>20</sup>). This contribution demonstrates how “in contemporary politics, think tanks play a distinctive role in the advancement of education privatization reforms. Despite varying levels of presence and relevance across different contexts, think tanks tend to influence educational reform processes through their active engagement in the politics of knowledge production. [...] Existing literature suggests that these institutions exert a noticeable influence on both agenda-setting processes and the reframing of educational debates by identifying key problems and promoting particular policies as appropriate solutions. Think tanks cultivate their authority through the publication of research studies, a high media profile, and connections with key political actors and policy networks.” (Verger et al., 2016, p. 138). Table 5.2 illustrates the interventions suggested by the Alleanza per l’Infanzia to improve the Italian educational system.

**Table 5.2 Alleanza per l’Infanzia recommendations to improve the Italian educational system**

Recommendations	Actions
<p><b>Strengthening the legislative framework and financial allocation of resources to combat early school leaving</b></p>	<p>Increasing funding for educational provision both in the school curriculum and in informal learning pathways</p> <p>Reviewing the maximum threshold for funds made available to schools through the national operative plan <sup>21</sup> (piano operativo nazionale) and the regional operative plan <sup>22</sup> (piano operativo regionale)</p>
<p><b>Increasing access to full-time school</b></p>	<p>For students from 13 to 18 years old, increasing the duration of the school week to around 40 hours in total, dedicating the additional hours to activities adapted to their interests</p>
<p><b>Improving the quality of teaching</b></p>	<p>Promoting forms of personalized teaching</p> <p>Reviewing ongoing teacher training</p> <p>Strengthening inclusive teaching, reinforced by mediation staff</p> <p>Increasing the number of support teachers</p>

<sup>20</sup> [https://www.senato.it/application/xmanager/projects/leg18/attachments/documento\\_evento\\_procedura\\_commissione/files/000/283/801/Memorie\\_Alleanza\\_per\\_l\\_Infanzia.pdf](https://www.senato.it/application/xmanager/projects/leg18/attachments/documento_evento_procedura_commissione/files/000/283/801/Memorie_Alleanza_per_l_Infanzia.pdf)

<sup>21</sup> The national operative plan is a program funded by the EU to promote social employment and economic equality in the different areas of Europe, reducing the disparities between more and less developed regions. The financings allocated to these programs are the Structural Funds: the European Social Fund, destined to promote skills for growth and the European Regional Development Fund, intended to support learning environments.

<sup>22</sup> The regional operational plan (national co-financing fund and fund for underutilized areas) aims to ensure that the objectives of each territory are achieved.

## **5.2 Improving the quality of the educational system (advocacy strategy no. 2)**

This paragraph analyzes the recent measures foreseen by the Italian Plan of Recovery and Resilience to improve quality in the educational system. This theme emerged as a central issue through the empirical analysis, as will be illustrated in Chapter 10, thus constituting the second advocacy strategy that attracted attention for further investigation.

Consequently, the lines of interventions of the Mission 4, “Education and Research”, envisaged by the Italian Plan of Recovery and Resilience are examined in the framework of the quantitative expansion of education services and the improvement of teacher recruitment and training processes.

### **5.2.1 “Education and Research” mission to pursue quality in education**

The intervention to improve the quality of the Italian educational system in the framework of the National Plan of Recovery and Resilience is called Futura – The school for Italy of tomorrow (La scuola per l’Italia di domani). Its goal is to guarantee the right to study and the digital skills necessary to face the challenges of the future overcoming all types of inequality, educational poverty and territorial differences.

The actions envisaged by the “Education and Research” mission will provide funding for €30,88 billion (Italian Ministry of University and Research website<sup>23</sup>) and are summarized in Table 5.3.

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<sup>23</sup> <https://www.mur.gov.it/pnrr/missione-istruzione-e-ricerca>

**Table 5.3 Educational interventions envisaged in the framework of Futura**

Interventions envisaged	Actions
<b>Reduce territorial differences</b>	Reducing territorial gaps as regards the level of basic skills (Italian, mathematics and English), in particular in the South  Developing a strategy to combat early school leaving in a structural way
<b>Strengthen the basic skills of the students</b>	Personalizing paths for schools with critical performance levels  Mentoring and training (even remotely) for at least 50% of teachers  Increasing school time with targeted projects
<b>Encourage the transition from the upper secondary school to university</b>	Managing university abandonments  Increasing the number of graduates  Strengthening the indicators of success (school attendance, improvement in learning levels, etc.)
<b>Increase the number of grants</b>	Extending scholarships to a larger share of subscribers
<b>Improve the skills of the teaching staff</b>	Redesigning the competition procedures for the placement of teaching staff by reinforcing the probation year  Integrating the laboratory training, with professional experience in educational institutions
<b>Develop the digital skills of the school staff</b>	Promoting an inclusive approach to digital education of the school staff

As of 10 January 2023, the total number of projects financed by the National Plan of Recovery and Resilience in the field of education in Italy was 26,810. As shown in Figure 5.1, most of the interventions is located in central and southern Italy (Futura website<sup>24</sup>).

<sup>24</sup> <https://pnrr.istruzione.it/>

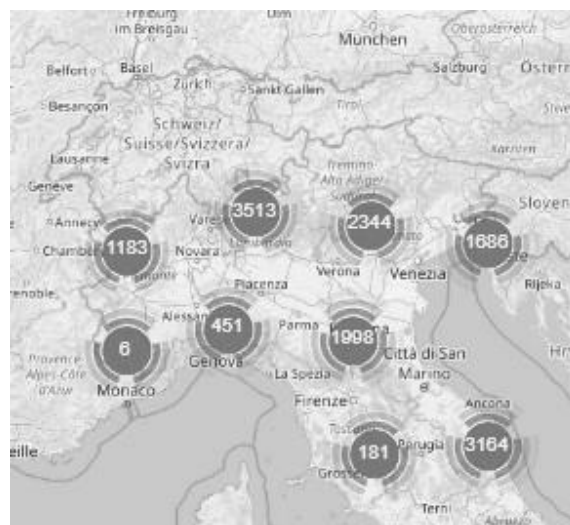
**Figure 5.1 Interventions in education located in Italy**



Source: Futura website

Moreover, the largest number of initiatives in northern Italy was carried out in Milan (3.513), followed by Venice (2.344) and Parma (1.998). The areas of interest of these projects mainly concern the digital technologies and STEM disciplines, with particular attention to the female participation in the implementation of each activity.

**Figure 5.2 Interventions in education located in northern Italy**

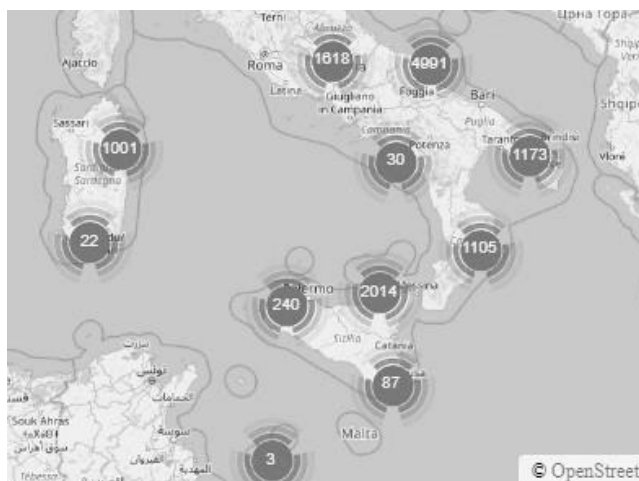


Source: Futura website

By way of example, among the projects carried out in northern Italy, the Daniele Crespi high school in Busto Arsizio has created virtual classrooms in which students use software to develop interactive learning methods, especially suitable for students who cannot attend class in presence.

Another educational project financed by the National Plan of Recovery and Resilience is being implemented at the Italo Calvino high school in Jesolo to offer students the opportunity to participate in robotics initiatives and follow courses to raise awareness of the promotion of STEM disciplines.

**Figure 5.3 Interventions in education located in central and southern Italy**



Source: Futura website

In the city of Rome, 1,618 educational projects were carried out thanks to funds provided by the National Plan of Recovery and Resilience. For example, the new STEM laboratories created by the high school Luigi Einaudi allow students to learn how to use different technologies and develop scientific skills, stimulating creativity.

Moreover, in the city of Pescara the high school Alessandro Volta has activated trainings on transport, logistics, electrical engineering, ICT and mechanics. Several female students attend these courses as part of the promotion of equal opportunities.

A further example of educational projects financed by the National Plan of Recovery and Resilience funds, in southern Italy, is the strengthening of courses in scientific subjects, such as robotics and AI at the high school Ettore Maiorana in the city of Brindisi, aiming to transmit scientific information to students with particular attention to gender equality (Italian Ministry of Education website<sup>25</sup>).

Finally, among the projects financed by the National Plan of Recovery and Resilience in the field of school staff training, the National Pole (Polo Nazionale) provides MOOCs to guarantee the permanent training of school staff on the topics of digital teaching, management and administrative innovation in schools.

### **5.2.2 Fondazione Cariplo operating in synergy with the National Plan of Recovery and Resilience**

In Italy, Fondazione Cariplo operates in synergy with the National Plan of Recovery and Resilience. The foundation, in fact, brings new forms of governance into play through the diffusion of new policy ideas

<sup>25</sup> <https://pnrr.istruzione.it/storie/>

involving advocacy and private solutions to social problems (Junemann et al., 2016). As stated on its website:

“the National Plan of Recovery and Resilience is allocating enormous resources throughout Italy and therefore also in the reference area of the Fondazione Cariplo. Approximately one third of the total funds made available by the National Plan of Recovery and Resilience is reserved for investments entrusted to the management of the territories and directly or indirectly assigned to local authorities.” (Fondazione Cariplo website<sup>26</sup>).

Fondazione Cariplo intends to support the local authorities of Lombardy and the provinces of Novara and Verbano-Cusio-Ossola in accessing the financial opportunities offered by the plan. Furthermore, its purpose is to strengthen the planning capacity of local authorities to manage the various financing opportunities that arise. To achieve this objective, an intervention divided into two lines of action has been envisaged. The intervention consists of:

- a Call for Common Objectives, to support the local authorities of the Fondazione Cariplo intervention area in accessing the territorial development opportunity offered by the National Plan of Recovery and Resilience, through the assignment of non-refundable grants for the realization of studies of feasibility;
- an assistance desk managed in collaboration with the National Association of Italian Municipalities of Lombardy (ANCI Lombardia, Associazione Nazionale Comuni Italiani Lombardia), aimed at providing assistance to local authorities in the planning of initiatives already financed by the National Plan of Recovery and Resilience and deemed particularly consistent in the planning of Fondazione Cariplo.

As stated by the President of Fondazione Cariplo, Giovanni Fosti:

"The reform plan of the National Plan of Recovery and Resilience offers us a great opportunity to look to the future. To seize this opportunity and translate it into concrete projects, it is necessary to support the institutions' skills and encourage the possibility of working together on major common objectives. With this call, carried out in collaboration with ANCI Lombardia, Fondazione Cariplo intervenes precisely to support local subjects in the application and advanced planning phase and offers support to integrated development actions. People, skills and alliances to build the future: Fondazione Cariplo wants to invest in its role of community support." (National Association of Italian Municipalities of Lombardy website<sup>27</sup>).

Finally, the President of ANCI Lombardia, Mauro Guerra, states:

“The Municipalities are experiencing an extraordinary phase, in which emergency needs and opportunities for innovation and recovery intertwine. The National Plan of Recovery and Resilience, but also the complementary funds and the new European programming,

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<sup>26</sup> <https://www.fondazionecariplo.it/it/progetti/pnrr.html>

<sup>27</sup> <https://anci.lombardia.it/dettaglio-news/202211211240-bando-fondazione-cariplo-per-facilitare-l-accesso-del-territorio-alle-opportunit%C3%A0-del-pnrr-collaborazione-con-anci-lombardia/>

offer a unique opportunity which requires maximum commitment and which cannot be wasted. Fondazione Cariplo had already grasped the importance of this phase by launching a valuable work of support to the Municipalities with ANCI Lombardia also through the activation of “Centers of Competence”. Today, thanks to the availability of the Foundation, we are taking an important step forward. Expand the scope of common work to guarantee Municipalities technical and specialist support for the effective implementation of the National Plan of Recovery and Resilience and more. Expertise, public-private synergies, support for the work of the Municipalities, in a strategy shared with the Lombardy Region, are values of the challenge of sustainable development."

### **5.3 The implementation of Italian policies of social investment in education**

After presenting the first two advocacy strategies in education emerged through the interviews, this paragraph highlights the Italian policy-scape in which new philanthropic actors carry out these strategies.

Therefore, the following sections provide an introduction to the Italian social investment policies focused on redefining childhood education (advocacy strategy no. 1) and on improving the quality of the educational system (advocacy strategy no. 2), analyzing some specific interventions that implement the European Child Guarantee aiming to combat social exclusion, in the framework of Europeanization.

#### **5.3.1 The context of Italian social investment policies**

In Italy, experts say that an integrated social investment approach is an ambitious challenge, due to the functionally skewed corporatist and fragmented welfare system. This system has historically been characterized by a low degree of universalism (apart from healthcare), limited vertical redistributive capacity, low degree of selectivity to reach the neediest, few enabling and “activating” measures, low level of service delivery, significant regional disparities, and a general inequality in income distribution, accompanied by a fragmentary and chaotic tax system (European Commission, 2015).

Italy is also a country characterized by low spending for the fight against poverty. However, the most recent reforms (Inclusion Income and Citizen Income) have radically changed the system of anti-poverty policies, with an unprecedented increase in spending. Therefore, for a long time, Italy has not implemented policies to combat poverty. Faced with a labour market in which increasing doses of flexibility have been introduced over the years, Italy has long postponed the approval of an organic reform of the social safety nets (Ciarini et al., 2000).

Concerning young people, Deep Dive analysis is the document that maps and analyzes policies and services for social inclusion, focusing on the groups of children at the highest risk of not benefiting from these services. It assesses the main challenges in the fight against child poverty and social exclusion



and sets priorities for interventions for the coming years. Moreover, as stated in the document, poverty in Italy is still strongly linked to age and to the number of children per family and public spending on children and adolescents is still lower than that of most Western European countries. Policy areas covered by the European Child Guarantee, therefore, have room for considerably improvement, both in terms of funding and in terms of quality, coverage and accessibility of services. Some categories of beneficiaries are also particularly marginalized due either to the lack of universal services or to obstacles to accessing these services. Furthermore, there is also a significant gap between investments in monetary transfers and investments in services: most of spending on childhood and adolescence in Italy is made through monetary transfers, while only 26% of total spending on childhood and adolescence goes towards investments (Istituto Cattaneo, 2022).

### **5.3.2 Italian social investment policies against educational poverty**

The starting point for identifying children in difficulty is the incidence of individual absolute poverty (percentage of people living in households in absolute poverty compared to residents). In 2021, this percentage for the Italian population aged 0-17 was 14.2% (ISTATa, 2022).

The territorial distribution of poverty shows the profound territorial differences that characterize Italy and the strong concentration of poverty and vulnerability in the southern regions. In single-parent households the incidence of poverty is significantly higher than in two-parent households, due to a high presence of adults with low or null income from work (factor which limits the possibility of accessing family allowance and deductions for dependent children).

As regards the prevention of social exclusion on the educational and training front, also as a coordinated response to the effects of the pandemic, the strategy promoted by the National Childhood Guarantee Action Plan, implemented in 2022, is the adoption of the Community Education Pacts in the framework of the 2022-2023 School Plan (Piano Scuola), the initiative for the planning of educational and training activities of each entity of the national educational system. These agreements connect educational institutions, local authorities, public and private bodies and third sector entities to strengthen the educational offer through the integration of the public, private and non-profit sectors.

Furthermore, as regards the funds in support of the educational system, the Single Fund for Student Welfare and the Right to Study (Fondo Unico per il Welfare dello Studente e per il Diritto allo Studio), implemented in 2017, provides scholarships for low-income secondary school students, while the Funds for the total or partial free supply of textbooks (Fondi per il bando per la fornitura gratuita, totale o parziale di libri di testo), implemented in 1998, for pupils completing compulsory schooling and for low-income secondary school pupils, delivers textbooks, dictionaries, digital teaching aids and notebooks.

**Table 5.4 Italian social investment policies to improve the quality of the educational system**

Policies for quality of the educational systems	Actions
<b>National Child Guarantee Action Plan</b>	Implementing the existing and planned national and subnational policy measures, to improve access of children in need to key services covered by the European Child Guarantee
<b>Community Education Pacts</b>	Making agreements between schools and other public and private subjects to define the implementation aspects of educational and pedagogical projects also linked to territorial specificities and opportunities
<b>Single Fund for Student Welfare and the Right to Study</b>	Offering scholarships accessible to all students on the basis of economic needs and merit requirements and managed by the Regions
<b>Funds for the total or partial free supply of textbooks</b>	Providing for free, in whole or in part, textbooks, dictionaries, digital teaching aids and notebooks for the 2022-2023 school year for students of first and second grade secondary schools, state and equivalent, according to the income level of the family

## 5.4 Europeanization of social investment policies

This paragraph explains the concept of Europeanization, considered as the adaptation of member states' policies to the policy outputs of the EU. In this framework, the Italian government is implementing policies aimed at encouraging social investments in education, in response to the European Child Guarantee, and which facilitate cooperation between for-profit and non-profit actors to redefine childhood education and improve the quality of the educational system.

The Europeanization logic of socialization and learning, in which national actors redefine their interests according to dynamics of arguing and persuasion with other actors in the policy-scape, introduces the mechanisms of interrelation between European and Italian social investment policies in education, also illustrated in the lines of inquiry presented in the first chapter and referred to the link between European policies funding education and the recommendations implemented in national contexts.

Europeanization emerged as a term in European integration studies since the late 1990s, when a significant turn in this field of study helped uncover a link between changes in national policies and the decision-making process and the policy outputs of the EU (Symeonidis, 2021). Most of these studies share the idea that Europeanization can result in domestic change if it is "inconvenient". In this logic, the "goodness of fit" (Risse et al., 2001) between the European and the national level of policy determines the degree of pressure for adaptation generated by Europeanization on the member states: "the lower the compatibility between European and domestic processes, policies, and institutions, the higher the

adaptational pressure.” (Börzel & Risse, 2009, p. 5). In this thesis, I refer to the definition of Europeanization proposed by Radaelli, who considers it as:

“processes of (a) construction, (b) diffusion and (c) institutionalization of formal and informal rules, procedures, policy paradigms, styles, ‘ways of doing things’, and shared beliefs and norms which are first defined and consolidated in the EU policy process and then incorporated in the logic of domestic (national and subnational) discourse, political structures and public policies.” (Radaelli, 2004, p. 3).

There are two ways of conceptualizing the adaptational processes in response to Europeanization (Börzel, 2000). The logic of rationalist institutionalism suggests that Europeanization leads to domestic change through a differential empowerment of actors resulting from a redistribution of resources at the national level. This logic treats actors as rational, goal-oriented and purposeful, engaged in strategic interactions using their resources to maximize their utilities on the basis of given and fixed preferences. In this context, actors follow an instrumental rationality by evaluating the costs and benefits of different strategy options taking into account the expected behaviour of other actors. From this perspective, Europeanization is conceived as an emerging structure of political opportunity that offers some actors additional resources to exert influence, while severely limiting the ability of others to pursue their goals (Börzel & Risse, 2009).

The second mechanism of conceptualizing the domestic adaptational processes in response to Europeanization is learning produced via socialization processes, in which policy-makers are aware of their interdependence, and can inspire more commitment towards EU-level goals (Radaelli, 2008). Moreover, since the mid-1990s, “civil society” has become a fully-fledged player in the functioning of the EU, enabling to legitimize the institutions that dialogue with it, the policies which concern it and the agents who claim it (Michel, 2009). Thus, this second, more agency-centered version, conceives that differences are theorized in the degree to which domestic norms and institutions change in response to international institutional arrangements. In this context, actors are socialized into new norms and rules of appropriateness through processes of arguing, persuasion and social learning and to redefine their interests and identities accordingly (Börzel & Risse, 2009). Table 5.5 summarizes the two logics of domestic change in the Europeanization process.

**Table 5.5 Logics of domestic change in the Europeanization process**

Logics of domestic change	Processes
<p><b>Process of redistribution of resources</b></p>	<p>Rational, goal oriented and purposeful actors use their resources to maximize their utilities on the basis of ordered preferences</p> <p>Actors weigh the costs and benefits of different strategies considering the behaviour of other players</p> <p>Europeanization is conceived as an emerging political opportunity structure</p>
<p><b>Process of socialization and learning</b></p>	<p>Expectations are generated about the differential impact of Europeanization</p> <p>Actors are socialized into new norms and rules through processes of arguing, persuasion and social learning and redefine their interests accordingly</p>

Source: based on (Börzel & Risse, 2009).

In 2000, one of the principles of the new governance cycle announced by the European Commission was a stronger partnership between the EU and the member states in the context of mutual learning (between the member states, and between governments and EU institutions). This learning-based mode of governance was identified with the Open Method of Coordination (OMC) launched by the Lisbon European Council in March 2000. In its ideal-typical form, the OMC has potential for the learning process of Europeanization in at least three directions: EU-level learning within communities of policy-makers engaged in EU policy processes (or “learning at the top”); hierarchical learning from the EU level down to the domestic and local level (or “learning from the top”); learning from below, (that is social actors, regions and local governments) to the top (or “bottom-up” learning) (Radaelli, 2008).

The OMC can also be seen as a new mode of governance. It was initially confined to employment and monetary policy, but subsequently introduced in an increasing number of policy areas, such as education and research (Gornitzka, 2005), including new ways of organizing and delivering policy and public service (Junemann et al, 2018).

Indeed, at the European level, institutions are experimenting new modes of governance that are not based on law and hierarchy, following a rationale that can be summarized as follows: in policies where the Treaty base for EU competence is thin or non-existent, such as in higher education, or where diverging interests of the member states make agreement on proposed EU legislation impossible, modes of governance based on Council guidelines, peer pressure, iterative processes of monitoring and indicators can lead the member states to an efficient coordination of reforms and thus produce Europeanization (Radaelli, 2008). The table below introduces the learning processes methods promoted by the OMC within the indications provided in the Lisbon conclusions.

**Table 5.6 Learning processes in the OMC**

Learning processes	Interventions
<b>Fixing guidelines for the EU combined with specific timetables</b>	Establishing quantitative and qualitative indicators and benchmarks, tailored to the needs of different member states as a means of comparing best practices
<b>Translating the European guidelines</b>	Decoding guidelines in national and regional policies by setting specific targets
<b>Periodic monitoring</b>	Evaluating and peer reviewing mutual learning processes

Source: based on (Radaelli, 2008, p. 242).

## **5.5 The contrast to social disadvantage in European education**

This final paragraph aims to provide an overview of the social context in which the new philanthropic initiatives in education arise. Consequently, the following sections present the main European social investment policies implemented to break the “cycle of disadvantage” and focused on initiatives for young people.

Furthermore, the sections highlight the link between social exclusion and educational poverty, confirming how the two issues are interconnected, as also introduced in the previous chapter focused on the Italian context, which is characterized by a high percentage of children and young people at risk of these two circumstances.

### **5.5.1 European social policies to break the “cycle of disadvantage”**

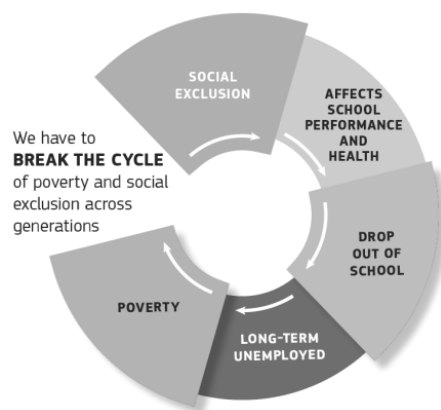
As stated by Esping-Andersen (2002), nowadays families with children are vulnerable to unemployment and it is not easy to disentangle the effects of income poverty from the experience of children's well-being. Moreover, if childhood poverty translates into less education, inferior cognitive skills and inferior lives, the secondary effect is a mass of low productivity workers, highly vulnerable to unemployment and low pay.

In this context, the Lisbon strategy represented an attempt to re-launch the idea of the positive complementarities between equity and efficiency in the knowledge-based economy (Vandenbroucke et. al, 2011). This broadened the notion of social policy as a productive factor beyond its traditional

emphasis on social protection, extending it to social advancement and to the improvement of the quality of training and education (Morel et al, 2012).

Later on, the Social Investment Package and the 2013 recommendation "Investing in children: breaking the cycle of disadvantage" implemented by the European Commission underline the importance of early intervention and preventive approaches in childhood education. They call on EU countries to: support parents' access to the labour market; enhance admission to quality education services that are essential for children's achievement; improve access to early childhood education and care, including for children under 3 years of age; eliminate school segregation; enhance access to health, housing and social services; support children's participation in out-of-school activities and decisions affecting children, such as social services and education (European Commission, 2013a).

**Figure 5.4 Breaking the cycle of disadvantage across generations**



Source: European Commission website, <https://ec.europa.eu/newsroom/just/items/706875/en>

Hence, in 2019 Commission President Ursula von der Leyen announced in her political guidelines the implementation of a European Child Guarantee, adopted with the related recommendation on 14 June 2021, to ensure that every child in Europe at risk of poverty or social exclusion can access the basic rights of free education and care (European Union website<sup>28</sup>). Moreover, according to Mahon (2016):

“Early childhood education and care (ECEC) has come to occupy an important place on the global policy agenda. Although many have endorsed its importance, differences arise in identifying the issues ECEC is designed to address and the recommended course of action. [...] education has only recently moved from being viewed largely as a domestic concern to become a matter for global debate. [...] International organizations were largely not involved in discussions of the importance of ECEC until the 1970s and initially their interest was limited to preschool education. Very young children (0–3) were assumed to be

<sup>28</sup> <https://ec.europa.eu/social/main.jsp?catId=1428&langId=en>

at home with their mothers. The concept of ECEC had yet to be invented and it was only in the 1990s that ECEC became a global issue.” (p. 224-225).

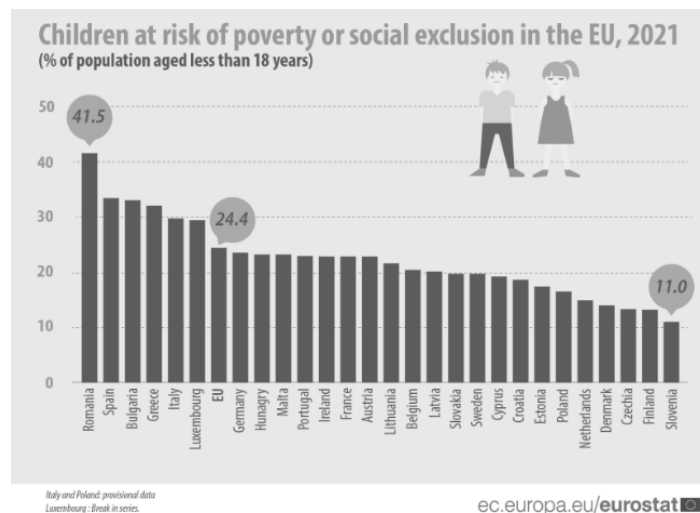
The EU also makes funding available for these actions under the European Social Fund Plus and the recent Recovery and Resilience Facility (RRF). The RRF, entered into force on 19 February 2021, is a temporary instrument, which allows the European Commission to raise funds to help member states adopt reforms and investments in line with the EU’s priorities and addressing the challenges identified in country-specific recommendations under the European Semester framework of economic and social policy coordination.

### 5.5.2 Risk of social exclusion in European education

Depending on the member state, the risk of poverty for children increases when they are raised by a single parent in families with three or more children and live in rural areas or in the most remote regions of the EU. Moreover, children from disadvantaged backgrounds are less likely than their wealthier peers to achieve well in school and realize their full potential in life (European Commission, 2021a).

As indicated by Eurostat, 24.4% of children in the EU were at risk of poverty or social exclusion in 2021. Consequently, member states have been invited by the EU institutions to continue implementing in close cooperation with the European Commission relevant actions for children’s education as recommended in the Action Plan on Integration and Inclusion 2021-2024.<sup>29</sup>

**Figure 5.5 European children at risk of poverty or social exclusion (2021)**

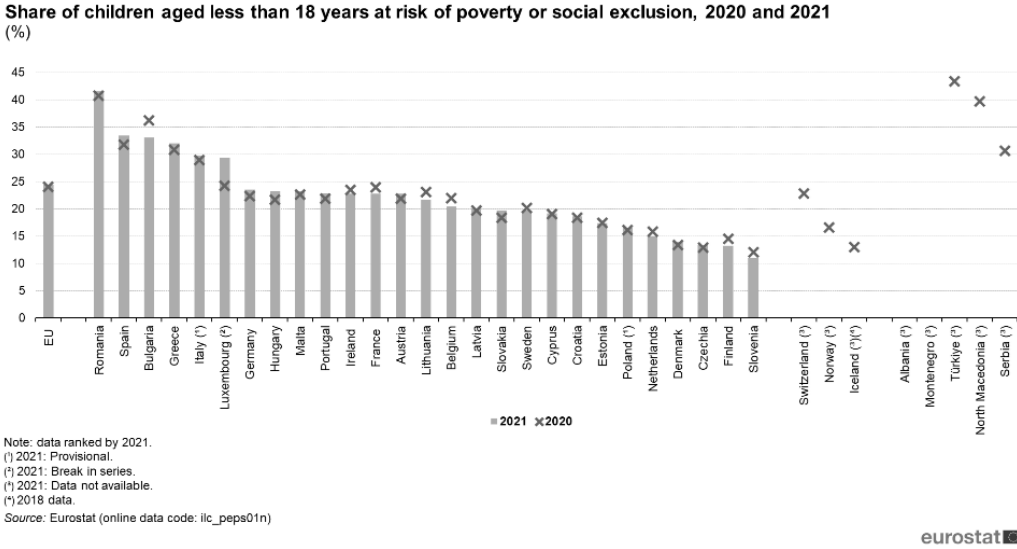


Source: Eurostat, [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Children\\_at\\_risk\\_of\\_poverty\\_or\\_social\\_exclusion](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Children_at_risk_of_poverty_or_social_exclusion)

<sup>29</sup> The Plan, presented by the European Commission on 24<sup>th</sup> November 2020, proposes actions and delineates funding to bring inclusion for all.

As Figure 5.6 shows, in the EU between 2020 and 2021, the risk of poverty or social exclusion for children increased from 24.0 % to 24.4 %. In particular, in 17 EU member states, the risk of social exclusion for children was higher in 2021 than in 2020. The greatest differences were verified in Spain (+ 1.6 %) and Hungary (+ 1.5 %). Only in Estonia the risk of poverty or social exclusion remained equivalent (17.4 %), while in nine member states it decreased. Among the latter, the largest diminutions were observed in Belgium (- 1.6 %), Bulgaria (- 3.2 %) and Lithuania (-1.5 %). Moreover, factors influencing child poverty or social exclusion in the EU in 2021 included: the household types “dependent children living with one adult” (44.1 %) and “dependent children living with two adults and two or more other dependent children” (31.1 %) (Eurostat website<sup>30</sup>).

**Figure 5.6 European children at risk of poverty or social exclusion in 2020 and 2021**



Source: Eurostat, [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Children\\_at\\_risk\\_of\\_poverty\\_or\\_social\\_exclusion#Children\\_at\\_risk\\_of\\_poverty\\_or\\_social\\_exclusion](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Children_at_risk_of_poverty_or_social_exclusion#Children_at_risk_of_poverty_or_social_exclusion)

Hence, the share of children at risk of poverty who had parents with a low level of education was more than 20% in 10 EU member states (Estonia, Greece, Luxembourg, Spain, Italy, Poland, Lithuania, Latvia, Bulgaria and Romania), with the highest rate recorded in Romania (37.4%). In contrast, the lowest rates were observed in Czechia (9.3%) and Denmark (9.4%) as well as in the Netherlands and Finland (both 10.3%).

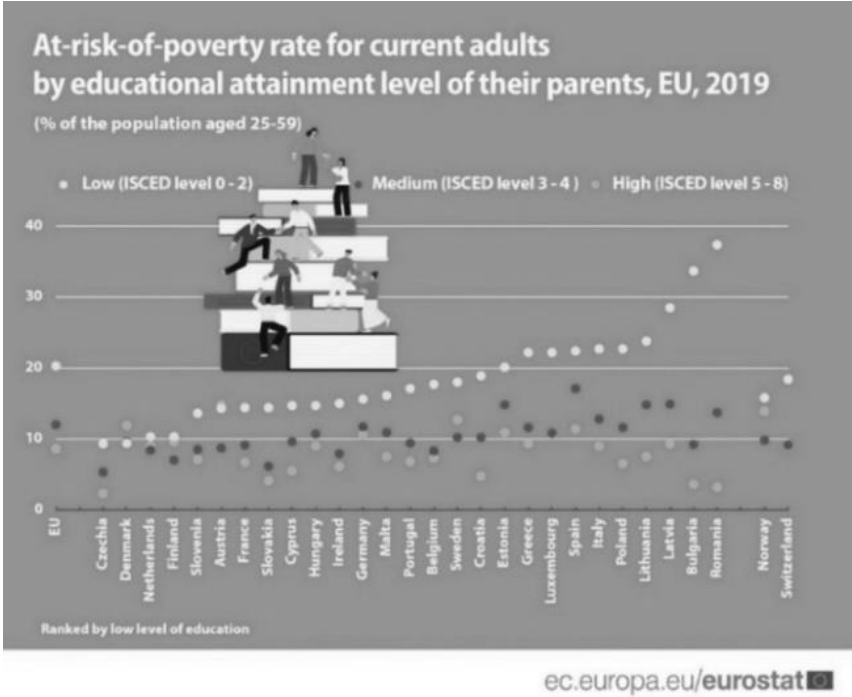
In conclusion, children who grow up in poverty or social exclusion face difficulties in doing well in school, enjoying good health and realizing their full potential later in life. Economic poverty and educational poverty are interconnected and passed down from one generation to the next (Con i Bambini website<sup>31</sup>).

<sup>30</sup> [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Children\\_at\\_risk\\_of\\_poverty\\_or\\_social\\_exclusion#cite\\_note-1](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Children_at_risk_of_poverty_or_social_exclusion#cite_note-1)

<sup>31</sup> <https://www.conibambini.org/en/educational-poverty-in-children-and-youth/#:~:text=Educational%20poverty%20among%20children%20and,to%20relate%20to%20the%20world.>



**Figure 5.7 Children at risk of poverty by educational attainment of their parents (2019)**



Source: Eurostat, <https://ec.europa.eu/eurostat/web/products-eurostat-news/-/ddn-20211207-1>

Furthermore, in Italy, the percentage of young people aged between 18 and 24 who have an educational qualification not exceeding lower secondary levels is 14.5%, while the European average is equal to 10%.

**Figure 5.8 Percentage of young people aged 18-24 with at most a lower secondary school diploma in EU countries (2021)**



Source: elaboration of Openpolis and Con i Bambini on the base of Eurostat data

Compared to the rest of the EU, Italy is also one of the countries with the highest incidence of school dropouts. In 2021 it was the third country with most young people between the ages of 18 and 24 who dropped-out of school with at most a middle school diploma: 12.7%, lower than Romania (15.3%) and Spain (13.3%).

In this context, one objective of the Italian Plan of Recovery and Resilience, the largest RRF in the EU, is to intervene on territorial disparities, as they can limit the potential of children and young people. The following figure shows the main locations where interventions against school dropouts have been implemented and financed by National Plan of Recovery and Resilience. Most of the interventions were carried out in the regions of, Lombardy, Piedmont, Campania, Lazio, Molise, Puglia, Calabria and Sicily.

**Figure 5.9 Locations of the interventions financed by the anti-dispersion plan**



Source: elaboration of Openpolis and Con i Bambini on the base of Italian Ministry of Education data

### **Box 5.1 Big Picture Learning school breaking the cycle of disadvantage**

The first Big Picture Learning school was founded in 1995 in Providence (US), as a non-profit organization. Its founders, Littky and Washor, had experience as teachers and principals and, in their work, focused on the limitations of the traditional school. Their thinking was that the educational system failed in “being for everyone”.

Today, the Big Picture Learning network includes about 300 schools in 15 countries, as Italy, the Netherlands, Israel, New Zealand, Australia and Canada, and follows the path indicated by its founders in order to create an alternative educational paradigm focused on:

- make students the protagonists of their own educational path becoming active and aware subjects;
- evaluate the students not through standardized tests but through the creation of “exhibition” projects designed by the students themselves on the basis of their passions and interests;
- train one student at time, placing students at the center of the educational path.

The Italian branch of Big Picture Learning was born in Biella in 2016 inside the SellaLab, a co-working space made available by the Sella bank. As regards the teaching model, the branch is based on an innovative one centered, for example, on the ban on the use of textbooks, on the discovery of the TEDx conference, on learning to speak in public, etc.

The Italian Big Picture Learning school has the legal form of a cooperative and is recognized by the Ministry of Education as a secondary school. The course of study is based on 5 years but, depending on the student, it is possible to choose to slow down. Therefore, an aptitude test is carried out at the end of each school year. The relative annual preparation course is also agreed with the student and the family on the basis of the “work to be done”.

As for the lesson schedule, courses take place both in presence and online, according to a shared calendar. The indicative timetable is from 8.30 to 16.30, but the lessons are structured with free hours dedicated to studying or carrying out extracurricular activities, such as sport, music and theater. Furthermore, the school does not follow the conventional calendar as relating to holiday periods, but a rhythm similar to that of companies, with the aim of allowing students to understand the world of work.

Finally, the school requires the payment of an annual financial contribution which does not fully cover the expenses for each student. A 12-month contribution for each student is calculated on the basis of the Equivalent Economic Situation Indicator (ISEE, Indicatore Situazione Economica Equivalente), which is used to evaluate and compare the economic situation of families who intend to apply for a subsidized social benefit.

Source: <https://www.bigpicturelearning.it/>

## **5.6 Conclusion**

In this chapter I have analyzed European social policies for redefining early childhood education and the Italian educational system more generally. As emerged from the empirical data collected through the interviews and subsequently presented in Chapter 10, these two issues are of crucial importance in Italy.

The measures for the implementation of the European Child Guarantee in the country were then examined, aimed at preventing and combating social exclusion by guaranteeing the effective access of needy minors to education and care. Among these measures, the National Action Plan for the Implementation of the European Child Guarantee was shared by various stakeholders from different social spheres, such as institutions, local authorities and youth representative bodies, highlighting the network dimension of these interventions, animated by brokers, policy entrepreneurs and major funders (Junemann et al., 2016).

In the chapter, I also focused on the recent Italian measures in the educational field envisaged by the National Plan of Recovery and Resilience to create a new educational system capable of guaranteeing the right to study to overcome all types of inequality and combat educational poverty.

In conclusion, in the light of the analysis introduced in the chapter, it is possible to consider it essential for Italy to modernize its educational system and overcome poverty, social exclusion and inequalities through the funds provided by the National Plan of Recovery and Resilience.

## Chapter 6

### **Social investment policies to pursue educational change**

The following paragraphs elaborate on the dynamics of the third advocacy strategy to bring about educational change and detailed further in Chapter 10. After the presentation of the first and second advocacy strategies introduced in Chapter 5 (redefining childhood education and improving the quality of the educational system), this chapter outlines the main advocacy strategies implemented to pursue educational change in Italy. This theme, in fact, emerged as central in interviews with the employees of the new philanthropic organizations that took part in the research fieldwork.

The chapter begins with examples of projects of new philanthropic organizations promoting social investment to achieve educational change by making young people “agents of change” in an inclusive policy-scape composed of policy-makers, experts, NGOs, academics and agencies of EU institutions, generating an increasingly influential “international architecture” (Mundy & Murphy, 2001).

The sections then continue in the exploration of European youth policies on social investment to overcome inequalities aimed at reaching agreements between schools and public and private bodies to define the implementation of educational projects linked to territorial specificities and opportunities, with the intention of improving the educational system. Finally, in order to contextualize Italian policies within the framework of Europeanization, the chapter concludes by exploring European initiatives focused on young people.

#### **6.1 Pursuing educational change (advocacy strategy no. 3)**

In this paragraph, I present the third advocacy strategy that emerged in the interviews, namely that of pursuing educational change, through examples of initiatives of this type implemented by three new philanthropic organizations that were part of the research fieldwork: Teach for Italy, Ashoka Italia and Learning for Well-being. The following sections provide examples of actions carried out by these actors to support change in the school system thanks to the participation of young people in educational initiatives.

The paragraph will also show how, through the private sector involvements, networks of social relations are established between politicians, civil servants and business which inform policy thinking about education (Ball & Youdell, 2008).

### 6.1.1 Teach for Italy pursuing educational change through “changemaker actors”

Teach for Italy is an NGO that works to strengthen Italian public schools with high educational poverty rates. Its goal is to build a school system where the students’ background isn’t the only parameter determining the future level of education and opportunities. As stated on the organization’s website:

“Teach For Italy wants to achieve an impact that schools can and must have, starting from the most disadvantaged communities.”

Teach For Italy is part of Teach For All, an international network of educators and “changemaker actors” that aims to address educational inequalities in more than 60 countries. Moreover, Teach For All works to unlock the *collective leadership potential* within and outside the educational systems, by making schools less unequal (Teach for All website<sup>32</sup>).

Each organization in the Teach For All network recruits young people in their respective countries, who commit to teaching for a minimum of two years in disadvantaged public schools seeking to keep them in the school system in the future. After two years of teaching, teachers involved in Teach For All programs become part of an international network of innovators and experts, to contribute to a positive impact in the educational systems. To this end, the international Teach For All network allows partner organizations, teachers and students to exchange good practices and innovative ideas within the network.

Furthermore, Teach For Italy collaborates with the Italian Ministry of Education, trade associations and non-profit organizations, to build a movement to fight inequalities in education in Italy. The goal of contributing to educational change is declared on the organization’s website, which states:

“Our mission is to strengthen public schools in Italy. We seek to generate impact on three levels: the classroom, schools and the educational ecosystem. We want to enhance the role of the teacher by selecting and training young talents to teach in contexts where the challenges associated with educational poverty are greater. Long term, we want to build a network of future education leaders across all sectors of the country who are dedicated, for the rest of their lives, to strengthening public schools and addressing educational inequalities.” (Teach for Italy website<sup>33</sup>).

In the short term, through a scholarship program, Teach for Italy aims to strengthen public schools, attracting young talents to teaching:

“Through classroom experience and ongoing professional learning, program participants develop the knowledge, skills and attitude needed to have a transformative impact on their students and in their schools.” (Teach for Italy website<sup>34</sup>).

As also declared on the website of Teach for Italy, its final goal is to build a network of future leaders in all key sectors of the Italian educational system to address inequalities:

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<sup>32</sup> <https://teachforall.org/>

<sup>33</sup> <https://www.teachforitaly.org/chi-siamo/organizzazione>

<sup>34</sup> <https://www.teachforitaly.org/chi-siamo/il-nostro-metodo>

“Twenty years from now, our fellows will be working in and outside the education ecosystem: many will still be teachers, others will be school leaders, workers of the national or local Ministry of Education, still others will be journalists, lawyers, doctors, entrepreneurs and social innovators, all united in the common goal of increasing educational equity and strengthening public schools in Italy.”

### **Box 6.1 The partnership between Teach for Italy and the UniCredit bank**

The Teach for Italy project to train a new generation of teachers who will commit to changing educational systems is gaining new impetus thanks to the collaboration with the UniCredit bank, which financed the activities of the European Teach for All network for the 2022-2023 school year through a donation of around €2 million. The CEO of the Italian branch of the UniCredit bank, Andrea Orcel, spoke about:

"a project very much in line with the bank's values."

So, as the banker added:

"It could become a structural and growing investment, to give a boost to the educational systems of the various countries, which combines the dedication of teachers and of non-profit organizations with our private push."

Referring to the collaboration with the UniCredit bank, the President of Teach for Italy declared:

"The partnership we are announcing today with UniCredit is fundamental to our work, as it will support us in the coming years in reaching a minimum of 150 disadvantaged schools across the country."

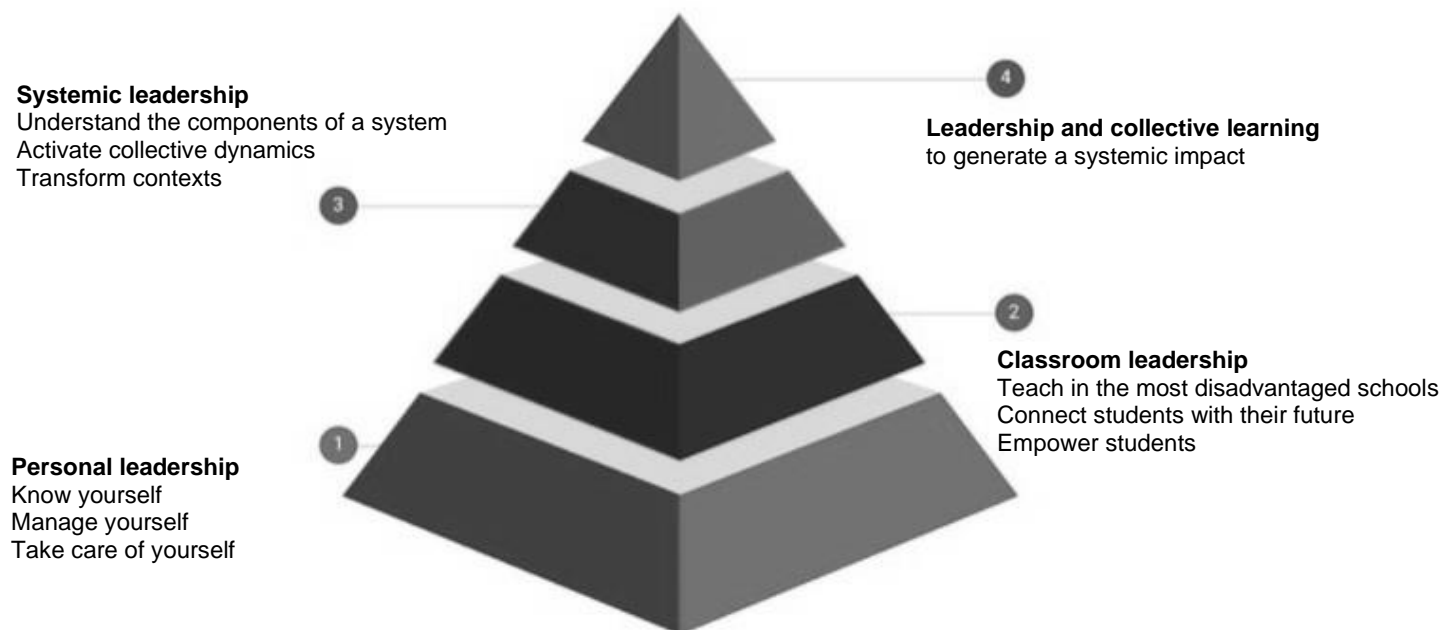
Source:[https://finanza.repubblica.it/News/2022/09/21/unicredit\\_con\\_teach\\_for\\_all\\_per\\_sostenere\\_educazione\\_orcel\\_inve\\_stiamo\\_di\\_piu\\_nel\\_sociale-29/](https://finanza.repubblica.it/News/2022/09/21/unicredit_con_teach_for_all_per_sostenere_educazione_orcel_inve_stiamo_di_piu_nel_sociale-29/)

Teach For Italy started its activities in 2019 and launched the first fellow scholarship in 2020. In agreement with the Ministry of Education, the NGO created the "Teach for Italy Schools Network" which today brings together about 100 schools in Italy. To realize its vision, that is a country with equal educational opportunities for every student, Teach For Italy works in partnership with companies interested in the educational ecosystem, to build a growing network of partners and donors to support the consolidation of the organization. As stated by the organization on its website:

“In Teach For Italy we believe in the growth potential of our fellow teachers and we do our best to make them protagonists of their personal and professional growth path. We encourage them to know to understand themselves, the conditions and context in which they operate and we give them the opportunity to get in touch with different individuals, stimulated by the same vision and who wish to get involved to re-imagine the purpose of the instructions.”

Moreover, during the two-year period of training of the fellow teachers, Teach for Italy works with them to stimulate their growth in the areas of personal, classroom and systemic leadership, and collective learning.

**Figure 6.1 Support in the two-year scholarship to stimulate the fellows' leadership development promoted by Teach for Italy**



Source: <https://www.teachforitaly.org/il-programma/il-nostro-programma>

Teach for Italy accompanies the fellows along the development path of three dimensions of leadership, so that they can achieve a *positive change* in the world of education, through specific training: face-to-face and remote meetings, feedback provision, individual and group training by using an e-learning platform.

Concerning *personal leadership*, fellows are supported in a process of continuous learning and self-reflection to increase their impact in and out of school, shaping themselves as future agents of change. As for *classroom leadership*, fellows are trained in developing relationships, vision, goals, and student-centered instructional design in the classroom, to facilitate learning processes and monitor student progress.

At a *system leadership*, fellows have the opportunity to get to know and connect with the main players in the Italian educational system and to generate a positive impact on it, receiving indications on possible impact paths to follow after the scholarship.



**Table 6.1 The fellows' classroom experience to achieve transformative impact in education**

Experiences	Actions
<b>Construction of a contextualized student vision</b>	<p>Students imagine what they will become as adults, based on their aspirations and those of their families, the context of origin, the values and opportunities of the community in which they live</p> <p>The vision of the possible future of students becomes essential to define goals during the school year</p>
<b>Building a community in the classroom</b>	<p>Fellows invest time and energy to create inclusive classroom communities based on trust and appreciation of diversity</p> <p>Students are encouraged to express themselves and their ideas</p> <p>Fellows act as facilitators of learning processes by initiating students towards autonomy and collaboration in learning from and with others</p>
<b>Teaching on the base of the students-centered point of view</b>	<p>Students are the active protagonist of their own learning and each lesson is planned around their needs and requirements</p> <p>Teachers communicate to them why it is important to learn a specific topic anchoring it to their daily lives</p>
<b>Summer school training</b>	<p>Fellows participate in a 6-week face-to-face and distance learning experience between July and September with national and international experts, with the goal to prepare them to enter the educational system and become <i>transformative teachers</i></p> <p>Teacher education focuses on creating a safe and inclusive learning environment, teaching planning and delivering lessons focused on students' needs and interests using active learning methodologies</p> <p>Fellows discuss the main challenges of innovation in education in Italy to reflect on how to strengthen public schools and achieve a <i>systemic impact</i> on inequalities</p>
<b>Educational coaching</b>	<p>A coach supports fellows in their personal and professional development as <i>transformative teachers</i> and <i>future change agents</i></p> <p>Three times a year, scholars and coaches meet to set up goals to develop the skills needed and to build collective leadership</p> <p>In a three-phase classroom observation, the coach observes the fellow in action in a classroom</p>
<b>Training and tutoring</b>	<p>After the summer school, Italian and international trainers from various sectors support fellows in specific disciplinary areas</p> <p>Tutors support fellows with one-to-one meetings and group workshops</p>
<b>Collaborative groups</b>	<p>Peer support is set up to allow fellows to be proactive in learning and to develop a sense of agency and essential relational skills</p>
<b>Orientation towards post-exchange impact paths</b>	<p>Through individual and group meetings, the fellows explore the possible professional fields having a high <i>transformative</i> impact, in which to operate in order to carry on the Teach For Italy mission</p>

Finally, the question that guides the approach of Teach for Italy to teaching and learning in the classroom is:

“What would we see in the classroom if the purpose of education was to develop students as active citizens, builders of a better future, for themselves, their communities and for all of us?”

In conclusion, Teach for Italy believes that students should be the *protagonists* of their educational and growth process and for this reason its fellow teachers work to strengthen their *awareness* and encourage the development of their skills, in order to allow students, in turn, to take *responsibility* for themselves, their learning and their future.

### 6.1.2 Ashoka building an “Everyone a Changemaker” world

Ashoka is an NGO founded in 1980 and which operates today in more than 90 countries. Its main goal is to build a community of “young changemakers”, people who see themselves as capable of creating positive, large-scale change. “Young changemakers” play a critical role in Ashoka’s global movement, due their role in pointing society to an “Everyone a Changemaker” world, where every person can contribute to positive change and everyone has the right and ability to co-lead solutions that transform societies for the better (Ashoka website<sup>35</sup>). Furthermore, as stated in the “Unlonely Planet Report 2022” (Valera et al., 2022), Ashoka fellows:

“create opportunities for millions to contribute to positive social change, and through these opportunities, inspire individuals to become changemakers. [...] Committed to the inclusion of others, Fellows create opportunities for others to practice changemaking. By playing a role, individuals experience agency. It becomes clear that changemaking is not an ability reserved for a select few; it is for them, for you, for me— for everyone.” (p. 11).

Hence, regarding the role of young people in society, Ashoka fellows also realize that:

“it is time for a fundamental shift in how people see the world, especially the role of young people within it. By putting them in charge of leading change within their organizations, Ashoka Fellows give young people an opportunity to contribute. Further, they help reshape how society sees young people and develop the next generation of changemakers.” (p. 12).

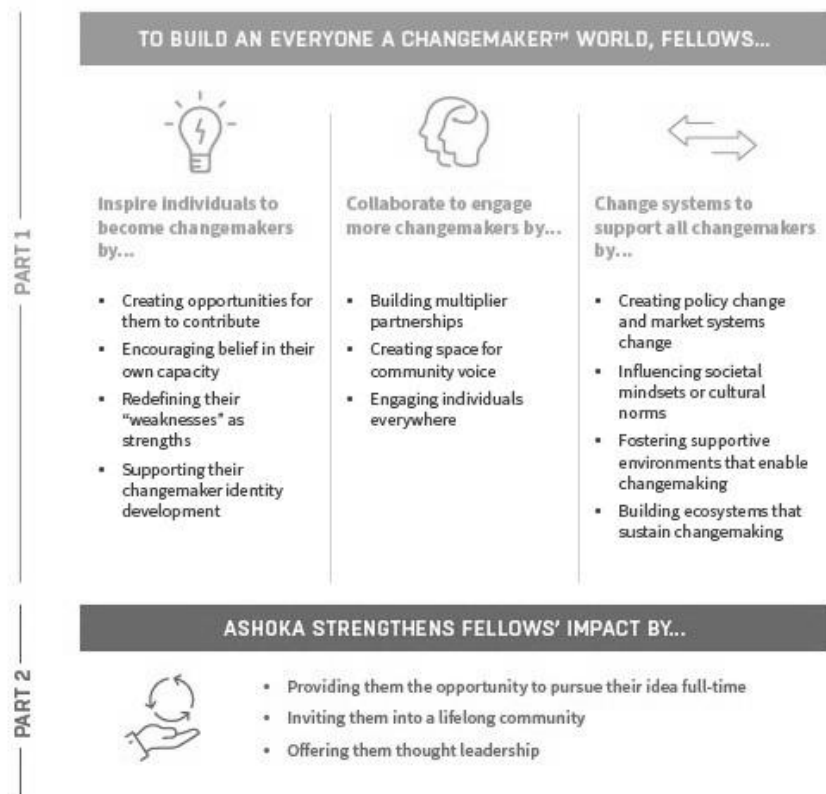
Furthermore, in order to contribute to positive change in society, Ashoka recognizes the importance of community-led changemaking to connect the collective power to public good. Therefore, the NGO invites people to partner, encourages replication and looks to community members to lead. In this scenario, Ashoka fellows also play a central role in the transition toward an “Everyone a Changemaker” world. They, in fact, seek to restructure institutions to operate in service of the collective good, reconfiguring

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<sup>35</sup> <https://www.ashoka.org/en-us>

relations between state and civil society, and producing new opportunities and a redistribution of moral responsibilities (Junemann et al., 2016).

**Figure 6.2 The process of building an “Everyone a Changemaker” world**



Source: Valera et al. (2022, p. 6)

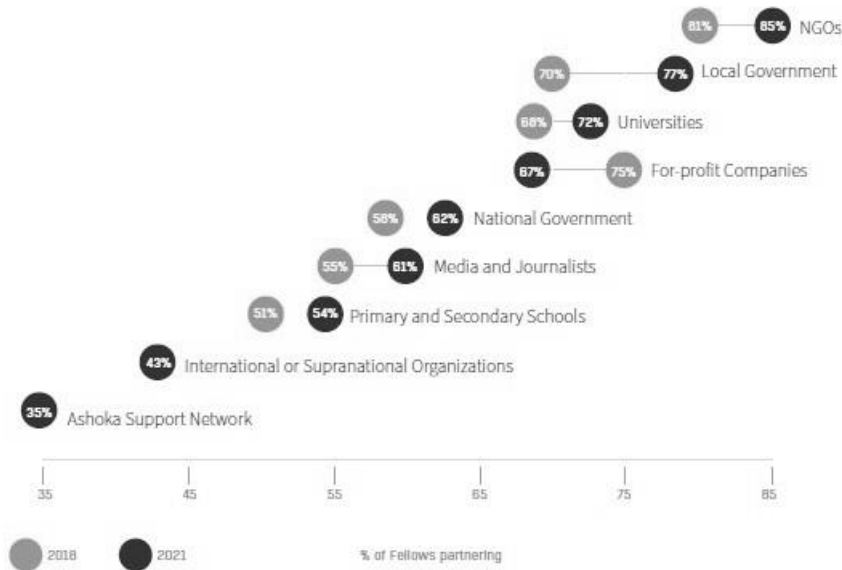
In the field of education, the Changemaker Schools programme, promoted by Ashoka, sees schools as the heart of the educating community. The NGO considers necessary to open the school to the outside world, establishing lasting relationships with parents and associations. To this end, the Changemaker Schools program has been active in Italy since 2017, following a research, mapping and selection process, which involved 70 experts and 475 school. To date Ashoka has elected 11 Italian Changemaker Schools in different regions, where the changemakers are students, families, teachers, school leaders and the entire school community. These subjects can also be considered as “*Change Leaders*” of *changemaker education*. In fact, as stated on Ashoka website:

“Many changemakers – students, families, teachers, school administrators and the entire school community – improve Italian schools every day with their imagination, passion and commitment. They are the pioneers of educational innovation, the change leaders of education for change. Changemaker Schools and their Change Leaders are an example of a new educational model” (Ashoka website<sup>36</sup>).

<sup>36</sup> <https://www.ashoka.org/it-it/programma/scuole-changemaker>

Moreover, in a context of collaboration, Ashoka fellows build partnerships that can generate changemakers and solutions. These “multiplier partnerships” aim to get their partners build on their original solution. Therefore, partners can be individuals, communities, or organizations (Valera et al., 2022), shaping global policy models engaged in a process of complex adaptation, with circuits of extralocal influence characterized by different forms of advocacy (Peck & Theodore, 2015).

**Figure 6.3 Ashoka’s strategy on creating multiplier partnerships**



Source: Valera et al. (2022, p. 16).

Moreover, in 2021, Ashoka and other 15 networks of social innovators worldwide, conducted a survey, interviewing 791 social innovators in 137 countries. What emerged was the need to build upon the strong local-international connection of social innovators in creating impactful social change (Ioan, 2021).

In the light of this, Ashoka Italy, in collaboration with the Ashoka Europe Fellowship Program, co-created a learning journey called Changemakers Dialogue! to navigate the most pressing educational challenges in Europe, where peer-to-peer learning could animate motivation, inspiration and innovation sharing

In the Changemakers Dialogue! learning program, Ashoka selected a multi stakeholder cohort of participants composed by social entrepreneurs, students, teachers, school directors, researchers, funders, and non-profit practitioners working in different countries in Europe who attended 6 thematic online meetings from January to June 2022. Every gathering began with three presentations from an Ashoka fellow, a “young changemaker” and an education practitioner who interacted with the participants in working groups. Changemakers Dialogue! therefore aimed to create a community of like-minded individuals with similar goals that could fuel *systemic change*.

### **Box 6.2 Ashoka fellows taking action to change education in Europe**

Ashoka has created a community of social entrepreneurs in education in Europe, working to reshape the educational systems and create a generation of changemakers. As stated in the report titled “Re-discovering the purpose in teaching: crafting the positive self-perception of teachers and school leaders’ changemaking role” (Ashoka, 2022) out of the 600 European Ashoka fellows, at least 150 of them are working on education related issues.

Over the past 20 years, Ashoka has partnered with more than 300 Changemaker Schools worldwide, 120 of which are based in Europe, and collaborated with thousands of other educational institutions. It also promoted youth programs in 8 European countries engaging 50 young changemakers who are at the front of innovation in educational systems.

Although the role of teachers and their implications and functions in society may vary over time and space, Ashoka recognizes that the importance of teachers in creating the next generation of changemakers is well established. The NGO, in fact, underlines the importance of putting young people at the center of discussions on the purpose and motivation of teachers and school leaders.

“Key to this mindset shift is to take the time to actively listen to young people and trust them, making them aware of their changemaker potential, to thrive in this complex world and keep us all motivated.” (Ashoka, 2022, p. 13)

### **6.1.3 Learning for Well-being aiming children self-awareness**

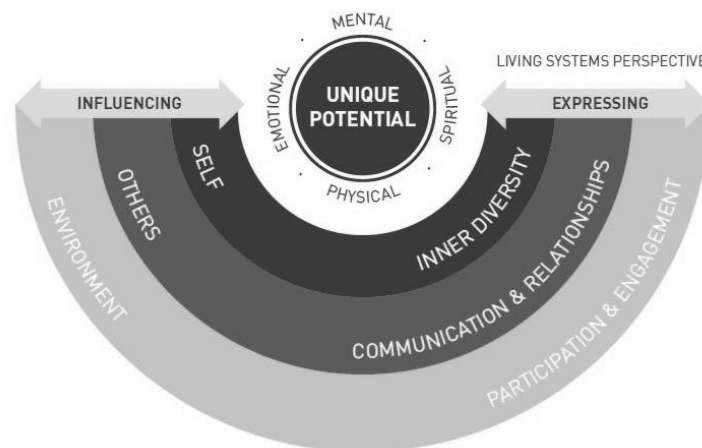
Since its inception in 2014, the Learning for Well-being foundation has advocated for the critical need for children to participate in defining and taking action for individual and collective well-being. Through practice, the foundation’s approach evolved to begin paying specific attention to intergenerational dynamics as a critical factor to enabling children’s participation. Well-being, therefore, requires spaces and means through which children participate in the definition and creation of well-being, not only for themselves but also for society.

In 2019, Learning for Well-being set three interconnected goals for the period 2020-2022, focused on promoting children well-being and participation, supporting adults and strengthening the foundation’s ability to implement its programmes “with alignment, love and courage.” (Learning for Well-being, 2021, p. 3). In 2021, the organization has also enhanced its understanding of the critical role of skills in children’s life and learning. Therefore, the foundation has expanded its ecosystem of partnerships working on developing well-being in school communities supported by the ‘Learning for Well-being

framework' (Learning for Well-being, 2021). As shown in Figure 6.4, the framework emphasizes specific points about learning:

- learning is a self-directed activity (teachers, guides, and other role models are critical to the process, but it is the learner who learns);
- learning is inherently a social activity, occurring in diverse environments and through interactions and relationships;
- learning is holistic, involving the whole person, “mind, body, heart, and spirit”;
- learning requires the development of capacities that enable learners to express their unique potential;
- learning is optimized through an assets-based perspective, in contexts which build on the learner’s natural strengths;
- learners have individual processes and needs that must be acknowledged and accepted (Awartani & Looney, 2015).

**Figure 6.4 Learning for Well-being Framework**



Source: Awartani & Looney (2015, p. 30).

Moreover, examples of projects to promote children’s learning and well-being are *ACT2gether World* Basic tools for self-awareness, relationships and participation and *Children as Actors Transforming Society*.

ACT2gether offers an innovative approach to implement children's participation, combining rights and well-being perspectives, recognizing the importance of intergenerational relationships, and mixing personal and collective transformation. The ACT2gether initiative aspires to change how society views children and young people, by positioning them as active actors and, above all, creating spaces where adults and children can collaborate.

In 2021, the foundation also developed the ACT2gether Youth Mentoring programme: The Learning for Well-being Experience. It consisted of an experimental series of activities to support self-awareness, using some practices based on the Learning for Well-being Framework, with the intention of subsequently creating a support project for future children and young people joining ACT2gether as collaborators, with the expectation that young people themselves can co-lead as peer trainers (Learning for Well-being, 2021).

Children as Actors Transforming Society (CATS) is a global program that offers children and young people a space to exchange perspectives with adults on how to work together to achieve a more just and inclusive society where all can fulfill their basic human rights and potential. Its flagship event, the annual CATS conference, offers an inclusive program, co-designed and co-led by children and adults, which in its first three years has brought together nearly 1,000 children, young people, and adults from more than 40 countries. The conference brings together diverse groups committed to children's action and participation at all levels of decision making from around the world. The group of partners associated with the conference includes international organizations such as the Council of Europe, UNICEF and Save the Children.

CATS aspires to model quality relationships between children and adults that enable mutual and meaningful learning across generations. The program also focuses on creating learning environments that engage the whole person, build on everyone's initiative, and are challenging, despite age, language, and cultural differences. In this context, the CATS conference can be considered as an opportunity to share knowledge and good practices in children participation, as well as to support the ability of children and adult to respect each other as competent partners, so that together they are better able to advocate for environments where young people's voices matter.

The project also emphasizes joint working and partnerships with families, schools, communities and especially with institutional stakeholders who have a common focus on learning and well-being. At the heart of the work is the goal to ensure that all children and young people have the opportunity to realize their unique potential. Furthermore, CATS is an experiment of working and living together in one space over a week long collectively organized conference focusing on the process of intergenerational and intercultural respect in which children are seen as competent partners.

To conclude, in this scenario, opportunities for education and learning should be focused on the goal of helping children to fulfill their potential. Finally, since children have unique characteristics and attributes that distinguish their learning style, developmental needs, and forms of self-expression, the learning environment should be more inclusive, focusing on the needs of all children and to their inner diversity, enabling them to grow and realize their potential to the fullest extent possible (Awartani & Looney, 2015).

## 6.2 European policies on social investment to overcome inequalities

In order to contextualize the social investment strategies implemented by new philanthropic organizations and presented in the previous sections, in this paragraph I introduce the European youth policy measures involving stakeholders from different social and political spheres, such as European public entities, government authorities at the national, regional and local levels and private organizations aiming to increase young people’s participation in educational change. In the light of Europeanization, these policies “influence” the Italian ones, as I will explain in the next paragraph.

Youth policy measures for educational change originate from the emergence of inequality in the European educational systems. Inequality has recently become a major concern for EU citizens. In fact, in spring 2021 equal opportunities were identified as the most important issue for the EU's economic and social development in the Eurobarometer survey<sup>37</sup>, highlighting the public perceptions of inequity on the impact of public policies, which can fuel discontent and mistrust of institutions and governments (European Union website<sup>38</sup>).

At the European level, the aim of reducing inequalities is reflected in the European Pillar of Social Rights, which sets out 20 principles and rights essential for fair and well-functioning labour markets and social protection systems. Furthermore, in their efforts to increase social protection, member states can also count on financing from the European Social Fund Plus and the RRF. Table 6.2 illustrates the recent European policies for overcoming social inequalities.

**Table 6.2 European policies for overcoming social inequalities**

European policies	Interventions
<b>European Pillar of Social Rights</b>	In order to reduce inequalities, 20 key principles and rights are set out for social protection systems
<b>European Pillar of Social Rights Action Plan</b>	Principles of the European Pillar of Social Rights are transformed into concrete actions for the benefit of citizens
<b>European Social Fund Plus</b>	EU's main tool for investing in people and supporting the implementation of the European Pillar of Social Rights
<b>Employment and Social Innovation Strand</b>	Fund under the European Social Fund Plus and implemented by the member states in partnership with the Commission for the period 2021-2027
<b>Recovery and Resilience Facility</b>	Temporary recovery instrument allowing the Commission to raise funds to help member states implement reforms in line with the EU's priorities

<sup>37</sup> [https://www.politicheeuropee.gov.it/media/5882/first-results\\_eb-spring-2021.pdf](https://www.politicheeuropee.gov.it/media/5882/first-results_eb-spring-2021.pdf)

<sup>38</sup> <https://ec.europa.eu/social/main.jsp?catId=1044&langId=en&newsId=1807>



### **Box 6.3 European funds for investing in people**

The European Social Fund Plus is the EU's main tool for investing in people and supporting the implementation of the European Pillar of Social Rights, making a contribution to the EU's employment, social, education and skills policies. Support from the European Social Fund Plus is mainly managed by the member states, with the European Commission playing a supervisory role. Therefore, through the shared management component, the fund is implemented by the member states in partnership with the Commission, providing a budget of around €99,3 billion for the 2021-2027 programming period.

In parallel, the recent RRF enables the Commission to raise funds to help member states adopt reforms and investments in line with EU priorities and address the challenges identified in the country-specific recommendations under the European Semester framework for economic and social policy coordination. To this end, it makes €723,8 billion available, of which €385.8 billion in loans €338 billion in grants.

The RRF entered into force on 19 February 2021 to finance reforms and investments in member states until 31 December 2026. Furthermore, the EU's long-term budget for 2021-2027 was approved following a negotiation process that started in July 2020, with the agreement of heads of state and EU governments. The last stage of the agreement process took place on 17 December 2020, with the final adoption of the 2021-2027 package by the Council of the EU. The EU will raise up to around €800 billion in current prices up to 2026 for RRF through a diversified funding strategy.

Source: [https://commission.europa.eu/business-economy-euro/economic-recovery/recovery-and-resilience-facility\\_en](https://commission.europa.eu/business-economy-euro/economic-recovery/recovery-and-resilience-facility_en).

## **6.3 European social investment policies focused on young people**

With the aim of deepening the policy-scope of initiatives aimed at tackling social exclusion of young people, this paragraph highlights the recent measures implemented by the EU to overcome this issue and that originate from the measure entitled Strategy of on the Rights of the Child (2022-2027). Therefore, the following sections illustrate how initiatives implemented under the strategy will give rise to other activities that promote young people's participation in education governance in order to pursue educational change. Among these initiatives, the Conference on the Future of Europe allows young people to take part to consultations related to educational themes.

### 6.3.1 The participation of young people to social life

The social investment perspective highlights the emergence of early childhood education and care policies, which add to an already significant impetus from many policy-focused contributions, including those from the European Commission (Nolan, 2013). At the European level, on 23 February 2022, the Committee of Ministers adopted the Strategy on the Rights of the Child (2022-2027), advancing the promotion of children's rights across Europe. The strategy was officially launched in Rome on 7 April 2022 as part of the Commission's long-standing commitment to putting the child at the center of its work and has been developed through a broad consultative process involving national governments, international organizations, civil society organizations and 220 children from 10 member states (Council of Europe website<sup>39</sup>).

Furthermore, as stated by the European Commission, the main stakeholders involved in the mechanisms and processes to facilitate children's participation in political and democratic life include international and European public organizations, government authorities at national, regional and community levels (ministries and state agencies), civil society organizations (with presence at international, national and local levels) and educational institutions. In this context, educational institutions are also important stakeholders, for recruiting children to take part in participatory mechanisms (European Commission, 2021c).

Specifically, the Strategy on the Rights of the Child identifies six objectives:

- increasing children's participation in political and democratic life;
- encouraging social and economic inclusion, health and education;
- combating violence against children and ensuring their protection;
- promoting child-friendly justice;
- favouring digital and information society;
- pursuing the global dimension of the interventions.

Hence, the EU Strategy on the Rights of the Child was developed in such a way that: "every child in Europe and across the world should enjoy the same rights and live free from discrimination and intimidation of any kind." (European Union website<sup>40</sup>).

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<sup>39</sup> <https://www.coe.int/en/web/portal/-/the-new-strategy-for-the-rights-of-the-child-2022-2027-adopted-by-the-committee-of-ministers>  
<sup>40</sup> [https://commission.europa.eu/strategy-and-policy/policies/justice-and-fundamental-rights/rights-child/eu-strategy-rights-child-and-european-child-guarantee\\_en](https://commission.europa.eu/strategy-and-policy/policies/justice-and-fundamental-rights/rights-child/eu-strategy-rights-child-and-european-child-guarantee_en)

#### **Box 6.4 The National Youth Council facilitating young people's participation to political life**

An example in Italy of implementation of the Strategy on the Rights of the Child, referred to the thematic area “Children's participation in political and democratic life”, is the activation of the National Youth Council (Consiglio Nazionale Giovani), which promotes and facilitates projects of youth interest. The National Youth Council, created in 2018, is the consultative body appointed to represent young people in dialogue with the institutions for any discussion on policies concerning the youth world. The Council is a member of the European Youth Forum, which represents the interests of European youth in international institutions. The tasks of the National Youth Council are:

- be heard by the President of the Council of Ministers or by the delegated political authority, on issues and policies that have an impact on the younger generations;
- express opinions and formulate proposals on legislative acts initiated by the Italian Government in the youth matters;
- collaborate with public administrations by preparing studies and reports on the condition of young people, useful for defining policies;
- encourage dialogue between institutions and youth organizations;
- promote the active citizenship of young people and, to this end, support the activity of youth associations and encouraging the exchange of good practices and networking between them;
- facilitate the formation and development of youth advisory bodies at local level;
- participate in European and international associative forums promoting communication, relationships and exchanges between youth organizations of different countries;
- support projects of interest to young people;
- promote meetings of youth organizations through the sponsorship of common projects in line with the aims and fundamental principles of the Council.

Young people's participation in the National Youth Council and European Youth Forum confirms that modern policy-making process is still focused on centers of political authority, but networks of policy advocacy and activism now exhibit a transnational reach. In this context, “transnational networks of experts and a scientific background accumulated by international organizations” (Normand, 2010, p. 413) are able to influence policy decisions. Furthermore, decision-making processes located in one jurisdiction, are increasingly able to impact those made elsewhere, so that global policy models can exert normative power across significant distances (Peck & Theodore, 2015).

#### **6.3.2 The European Forum on the Rights of the Child**

To bring young people back to the center through the EU Strategy on the Rights of the Child, the European Forum on the Rights of the Child “Bringing Children Front: empowering, protecting and including children” was held from 27 to 29 September 2022. The forum hosted more than 300 experts

who participated in this online event organized by the Directorate-General<sup>41</sup> (DG) Justice and Consumers and which provided a platform for dialogue between EU institutions and other stakeholders on children's rights. The latest edition of the forum focused on children's participation and empowering children as active citizens. Participants included young people, national authorities and policy makers, experts, NGOs, academics and EU institution agencies. Hence, the forum provides evidence that an increasingly strong and complex array of international non-governmental actors and non-governmental organizational forms is emerging in the new policy-space (Mundy & Murphy, 2001). In addition, article 24 of the Charter of Fundamental Rights of the EU states that children have the right to express their views and that these views should be taken into account. Regarding the right to be heard, Article 24 further declares that:

"Children [...] may express their views freely. Such views shall be taken into consideration on matters which concern them in accordance with their age and maturity." (Official Journal of the European Communities, 2000, p. 14).

Therefore,

"The European Commission promotes and protects the child's right to be heard in its legislation and policies. Children are agents of change and the Commission wants to support them in contributing to changes. Children were consulted on the strategy with the help of the leading child rights organizations and will be involved in the implementation and monitoring of the strategy." (European Commission website<sup>42</sup>).

Finally, the following table summarizes the main European policies focused on the promotion of children's rights.

**Table 6.3 Key European policies on children's rights**

European Policies	Actions
EU Strategy on the Rights of the Child	Encouraging the participation of the child in the political and democratic life
EU Child Participation Agenda	Connecting the existing mechanisms for child participation at local and national level to involve children in decision-making processes by conducting consultations at conferences
European Forum on the Rights of the Child "Bringing Children to the centre: empowering, protecting and including children"	Supporting children's empowerment Promoting dialogue between EU institutions and other stakeholders on the rights of the child

<sup>41</sup> DGs are policy departments of the European Commission, which are responsible for different policy areas and manage law and funding programmes.

<sup>42</sup> [https://commission.europa.eu/strategy-and-policy/policies/justice-and-fundamental-rights/rights-child/child-participation-political-and-democratic-life\\_en](https://commission.europa.eu/strategy-and-policy/policies/justice-and-fundamental-rights/rights-child/child-participation-political-and-democratic-life_en)

### 6.3.3 The conference on the future of Europe

Under the first thematic area of the EU Strategy on the Rights of the Child on “participation of the child in the political and democratic life”, the Commission proposes a number of actions and sets up, in cooperation with the European Parliament and the child rights organizations, an EU Child Participation Agenda Platform, to link existing mechanisms for child participation at local and national level, and to involve children in decision-making processes at EU level, by conducting consultations at conferences (EU Child Participation Platform website<sup>43</sup>). Hence, the Conference on the Future of Europe has opened up a new space for debate with citizens to address Europe's challenges and priorities, upholding citizens' support for common objectives and values. It is a bottom-up, citizen-focused exercise to enable Europeans to have their say on what they expect from the EU. The conference is also a joint initiative of the European Parliament, the Council and the Commission, acting as partners together with the member states (European Commission website<sup>44</sup>).

On 9 May 2022, the Conference on the Future of Europe concluded its work, presenting a report on the final outcome which includes 49 proposals to the European Parliament, the Council and the Commission. These proposals reflect the recommendations and aspirations of European citizens on the future of Europe and are divided into the same thematic areas chosen by the conference, with the Commission's assessment reported under each area.

The first set of new proposals will be included in the European Commission's work programme for 2023. In following up, the Commission will ensure that new reforms and policies do not exclude each other from discussions on the need for a Treaty change, focusing on remaining open to modification when necessary.

Finally, proposal number 46 suggests several measures to increase the participation of children and young people in the democratic life and decision-making processes, through cooperation between schools, national and European authorities and profit and non-profit organizations, as illustrated in Box 6.5.

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<sup>43</sup> [https://commission.europa.eu/strategy-and-policy/policies/justice-and-fundamental-rights/rights-child/eu-child-participation-platform\\_en](https://commission.europa.eu/strategy-and-policy/policies/justice-and-fundamental-rights/rights-child/eu-child-participation-platform_en)

<sup>44</sup> [https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/new-push-european-democracy/conference-future-europe\\_en](https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/new-push-european-democracy/conference-future-europe_en)

### **Box 6.5 Proposal 46 of the Conference on the future of Europe focused on education**

According to the Report on the final outcome of the Conference on the Future of Europe, the EU and its member states should seek to establish by 2025 an inclusive European Education Area within which all citizens have equal access to quality education and life-long learning, including those living in rural and remote areas. To this end, the EU and its member states should:

- coordinate the level of all different education programmes in the EU and create links between the educational systems;
- develop future-proof education and life-long learning in Europe, in accordance with the right to free training in the workplace for all focusing on civic education about democratic processes, digital skills, STEM, entrepreneurship and research, improving critical thinking, integrating soft-skills in the school curricula, enabling everyone to learn about environmental sustainability, etc.;
- support the training of teacher, to learn from best practices and use up to date innovative teaching techniques;
- prioritize access to hardware and efficient broadband connectivity;
- set up an information platform for an EU-wide exchange of knowledge and experiences, showcasing best practice examples and offering citizens the opportunity to present new ideas for cross-border exchange.

Source: <https://www.europarl.europa.eu/resources/library/media/20220509RES29121/20220509RES29121.pdf>

## **6.4 Conclusion**

In this chapter, I have examined policies that promote social investment for youth participation in democratic life to achieve educational change. I also highlighted how the implementation of social investment policies in education is agreed at the intersection of the institutional, private and non-profit sectors, in which actors collaborate to achieve a more participatory educational system. Furthermore, the examples of initiatives presented in the first paragraph and concerning the educational activities promoted by the NGOs Ashoka Italia and Teach for Italy and the Learning for Well-being foundation, aimed at generating an educational change, confirm how “on many occasions, private players’ relationships crystallise in formal advocacy coalitions” (Verger et al., 2017, p. 327).

Finally, as part of the policy analysis, I looked at some initiatives in the field, such as the European Pillar of Social Rights and the European Social Fund Plus funding instrument. I also looked at the main financial actions under the RRF and their impact on European society and educational systems in order to deepen the socio-legal context in which new philanthropic actors carry out their social investment strategies in education.

## Chapter 7

### **Social investment policies to empower students in digital skills**

In this chapter of the thesis, social investment policies to empower students in digital skills are presented to deepen the fourth advocacy strategy illustrated later in Chapter 10. After having introduced the first, second and third advocacy strategies in chapters 5 and 6, in the following paragraphs I deepen the activities implemented to empower students in digital competences in the framework of the Europeanization of policies promoting e-inclusion.

The first paragraph focuses on the National Plan of Digital School and its main interventions in the Italian educational field. Furthermore, in the last section of the paragraph, examples of projects carried out by new philanthropic organizations investing in inclusive digital technologies in education are provided. These illustrations highlight how Italian initiatives fit into a broader European orientation towards the creation of an inclusive information society focused on citizens' digital competences.

The next paragraph introduces the Italian policies focused on the promotion of digital competences, such as the National Strategy for Digital Skills and the Fund for the Digital Republic, in the light of the latest Digital Economy and Society Index report of 2022, which presents the digital performance of member states through five dimensions: connectivity, human capital, use of the Internet, integration of digital technology, public services.

Finally, in order to contextualize Italian policies focused on empowering students in digital skills in the framework of Europeanization, the third paragraph focuses on the European Declaration on Digital Rights and Principles for the Digital Decade. In the field of digitalization of education, the declaration promotes the right to acquire digital skills for all, supporting efforts to equip educational institutions with the infrastructure to provide the digital competences needed to participate in society.

#### **7.1 Empowering students in digital skills (advocacy strategy no. 4)**

This first paragraph provides a focus on the fourth advocacy strategy that emerged in interviews with employees of new philanthropic organizations focused on social investment in education. In the first sections, I present the Italian policy-scape in which these strategies originate and which is mainly related to measures to strengthen human capital in digital skills. In this framework, I introduce Italian policies focused on the empowerment of students and teachers with digital competences, such as the National Strategy for Digital Skills, analyzed in the light of the initiatives put in place by the Italian government to reduce the existing gap with other European countries and to counter one of the main obstacles to the country's economic and social development, which is the low level of basic digital skills.

Finally, after having analyzed the lines of intervention of the strategy in the field of education, the National Plan Digital School is examined in relation to the various measures envisaged to positively impact the Italian educational system and examples of projects implemented within the Fund for the Digital Republic are provided.

### 7.1.1 The National Strategy for Digital Skills connecting schools and the professional system

As we saw in the previous paragraph, Italy, lagging behind other EU countries in terms of the population's basic digital skills level, has drawn up the National Strategy for Digital Skills, with the coordination of the Department for the Digital Transformation of the Presidency of the Council of Ministers. The strategy is based on the principles of digital education and citizenship and expresses the need to give the digital environment a space of equality, ethics and non-discrimination. The key interventions of the strategy are summarized in Table 7.1.

**Table 7.1 Italian policy interventions to strengthen human capital in digital skills**

Strategies	Actions
<b>Enhancing and integrating specialist skills in the fields of IT and computer engineering</b>	Promoting big data, AI, cloud, cybersecurity, statistics and management techniques to support digital transformation and Industry 4.0 (Internet of things, integrated IT, telecommunications and electronics)
<b>Integrating the specific themes of the study programs and the digital and methodological skills specific to IT applications</b>	Making digital disciplines foundational in several study courses
<b>Creating workspaces in which to generate contamination between researchers, students and professionals from different disciplinary backgrounds</b>	Encouraging the development of innovative projects with an entrepreneurial vocation to foster collaboration between the university and the production system
<b>Connecting constantly with the school system and the production system to improve the training cycle</b>	Promoting orientation and continuous training through university-industry partnerships and new forms of frontal teaching based on the integration of advanced telematic services
<b>Extending the analysis of the observatories</b>	Including in the observation the forms in which the non-curricular trainings are developed



The Strategy can count on the contribution of the “National Coalition” (Coalizione Nazionale), which was founded in June 2014 and which joins the Digital Skills and Jobs Coalition promoted by the European Commission. Through projects carried out by institutions, third sector bodies, private organizations and territorial networks, the “National Coalition” contributes, with a declared bottom-up approach, to achieve the expected results within the strategy. The strategy definition process also received contributions from citizens thanks to a consultation activated on a participated platform.

Moreover, as part of the “Grand Coalition for Digital Jobs” implemented by the European Commission, the “National Coalition” was created as a multi-stakeholder initiative with the aim of accelerating efforts on the employment front in terms of digital skills. In fact, as stated in the Pact of the National Coalition for Digital Skills:

“The National Coalition for Digital Skills” has the mission of developing digital literacy and promoting widespread awareness of technological innovation in the country, with particular regard to new professions and the world of small businesses, in order to support Italian society in its entirety and complexity to better face the challenges of digital transformation.”

Founded on collaboration between national and local public institutions, the world of business, professionals, education, research, trade unions, associations and civil society organizations, the coalition works to raise awareness on the digital issues and encourage the development of knowledge and digital skills for different targets: “digital awareness” of citizens and ability to use digital services, aimed at full participation in the current socio-economic context; digital skills of professionals for a constantly evolving labour market; ability to identify the most of the opportunities offered by the digital economy by entrepreneurs and managers; development of the potential to innovate processes and products and increase competitiveness in the global context of small and micro-enterprises. These relationships bring together a wide array of NOGs, citizens associations, and trade unions in forms of activism that target global-level institutions and issues while they attempt to use global-level visibility to achieve changes at the national level (Mundy & Murphy, 2001).

### **7.1.2 Recent developments in Italian digital skills’ policies**

One of the main planning instruments implemented by the Italian government to improve students' digital skills is the National Plan Digital School. The plan consists of 35 actions divided into 3 areas of intervention:

- tools, which include actions aimed at equipping schools with new learning environments based on digital technologies to implement innovative teaching methodologies;
- skills and contents, that are actions aiming at encouraging the development of quality contents for digital teaching;
- training, which includes actions designed to support educational and digital innovation through courses for the school staff.

In addition to the actions of the National Plan Digital School, a further contribution to the initiative aimed at enhancing students' digital skills is derived from the resources available under the National Operational Programme 2014-2020 'For School - Skills and Learning Environments' (Piano Operativo Nazionale 2014-2020. Per la Scuola - Competenze e Ambienti per l'Apprendimento). This Program offers schools the opportunity of accessing European financial resources and is divided into 4 axes, each with its own specific objectives: "Education", aiming to invest in skills and lifelong learning; "Infrastructures for education", for the strengthening of school infrastructures and technological endowments; "Institutional and administrative capacity", concerning the promotion of an efficient public administration; "Technical Assistance", aimed at improving the implementation of the Program by strengthening the management capacity of the funds.

Further experiences in promoting innovative teaching methodologies and in enhancing the digital skills of teachers and students derive from the Erasmus Plus program, created by the EU to offer university students the opportunity to visit partner institutions in other countries through short-term stays. As far as teachers are concerned, among the initiatives with the greatest impact, the eTwinning project is the largest European community of teachers active in electronic twinning between schools, which, through an IT platform, involves over 45,000 teachers in Italy, favouring collaboration to promote a new teaching method based on exchange and collaboration.

### **Box 7.1 Digital tools and platforms offered by the NGO Teach for Italy**

The NGO Teach for Italy offers a selection of tools and platforms available to teachers, students and families, to innovate the teaching process. The reference frameworks of the initiatives are:

- the National Digital School Plan, the guidance document of the Ministry of Education, University and Research for the launch of an overall innovation strategy of the Italian school and for a new positioning of its educational system in the digital era;
- the Digital Competence Framework for Educators (DigCompEdu) , the European reference model that indicates the digital skills that a teacher must acquire, providing for the development of 22 skills divided into 6 thematic areas.

The resources made available by Teach for Italy to teacher and students are:

- Kahoot!, a web service for generating interactive quizzes and tests, which is possible to answer with smartphone;
- Jamboard, a part of the package offered by Google Drive is a collaborative whiteboard, usable on any device, allowing teachers and students to work together by adding sticky notes, text, drawings and images;
- Genially, a tool for creating interactive content and animations, by ready-made templates to be used in the classroom in order to present information in an engaging way;
- Prezi, a software for building dynamic and engaging presentations, combining animations, storyboards and concept maps;
- Wordwall, which allows to create online interactive resources to be used both in printable and interactive versions through any device with Internet access;
- XMind, an open-source software for brainstorming and managing mind or concept maps, useful for capturing ideas, organizing them in the form of graphs of different nature and sharing them with other people;
- Mentimeter, a platform for constructing engaging presentations and getting feedback thanks to interactive elements like polls, word clouds and reactions.
- Miro's mind mapping software to help teams plan projects and design information architectures;
- MURAL, a digital workspace for visual collaboration which helps members of a team to imagine new ideas together, solve problems and find common solutions.

Source: <https://aulatfi.it/categorie/aree-tematiche/leadership-di-classe/didattica-digitale/applicazioni-digitali/>

### 7.1.3 Academies combining education and employment policies

Alongside the curricular training offer, numerous initiatives have been developed in education in recent years, in close collaboration with the business sector. These initiatives, often grouped under the label of Academy, tend to take the form of learning organizations aimed at creating communities of practice to enhance skills and attitudes. Referring to Academy schools, Woods et al. (2007) argue that what is happening through various incursions into the school curriculum is a form of inclusion in which areas in the public domain are being carved out for enhanced private influence over the cultural power to shape educational practices. They go on to claim that the boundaries between public control and private influence are becoming increasingly unstable.

An example of Academy is the ITS (Istituto Tecnico Superiore, Higher Technical Institute) Academy Lazio Digital Foundation, which operates in the field of higher technical education. Founded in 2022, the Academy is composed of a group of institutions and companies: the Metropolitan City of Rome; the Sapienza University; the municipalities of Pomezia and Palombara Sabina; the Order of Industrial Experts; the training agencies Orienta Academy, Algoritmo, Euclide, Stupendo and Mediafarm. This academy trains specialized technicians in the ICT sector in software development and digital skills, to respond to the growing needs of the entrepreneurial sector in the field of new technologies.

Furthermore, the ITS Academy Lazio Digital Foundation, based in Rome, is part of the national short cycle professional, post-diploma and tertiary educational system promoted by the Ministry of Education and the Regions, for the development and competitiveness of the country, in support of acceleration of digital transformation processes required by industry 4.0 (ITS Academy Lazio Digital Foundation website<sup>45</sup>). The courses are organized through 11 months of classroom teaching laboratories and additional 4 months of internship in a company. The teaching method is practical and allows for the direct recruitment of graduates in the same companies that co-design the study programs. These companies also host the internship experiences. Therefore, over 70% of the teaching staff comes from partner companies with the aim of bridging the gap between the job offer and the finding of suitable professional profiles.

The four study programs of the ITS Academy Lazio Digital Foundation seek to offer students opportunities in the professional field. For the two-year period 2022-24 the specialization paths are: cyber security expert, specialized in IT security of data and corporate infrastructures; game developer; developer 4.0; cloud developer, able to implement services that support corporate IT solutions. The duration of each course is 1,800 hours in total and the title obtained at the end of the courses is the 5<sup>th</sup> level senior technician diploma within the European Qualification Framework<sup>46</sup>, valid for state competitions.

Moreover, on the basis of a strategy that combines education, labour and industrial policies, the national system of ITS Academy aims to become a passepartout for the world of work. ITS Academy Lazio Digital Foundation, in fact, was born from the shared idea of the founding members to start an innovation hub

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<sup>45</sup> <https://www.laziodigital.it/>

<sup>46</sup> The European Qualifications Framework allows to compare the professional qualifications of citizens of European countries.

to systematize the worlds of training and business to directly affect the development of the production chain. Indeed, its mission refers to: “Correctly interpreting real needs, flexibly grasping the rapid renewal of the 4.0 labour market and introducing new ICT professionals into the system. An excellent partnership that brings together institutional bodies, research bodies, training institutes, university departments highly qualified in research on new technologies, such as that of Computer Engineering of the Sapienza University of Rome and the ITS Apulia Digital Maker Foundation – trade associations, science and technology parks and a network of companies of excellence in the ICT sector” (ITS Academy Lazio Digital Foundation website).

Summarizing, the network of the ITS Academy Lazio Digital Foundation connects people and organizations, facilitating the mobility of certain methods of policy like Academies and entrepreneurship (Ball, 2016). In this context, the academy aims at promoting scientific culture in the technological field, in the name of job opportunities. It also represents a new player in education, in addition to Ed-Tech companies and new philanthropies (Junemann et al., 2018)

#### **7.1.4 Implementing projects on digitalization through the Fund for the Digital Republic**

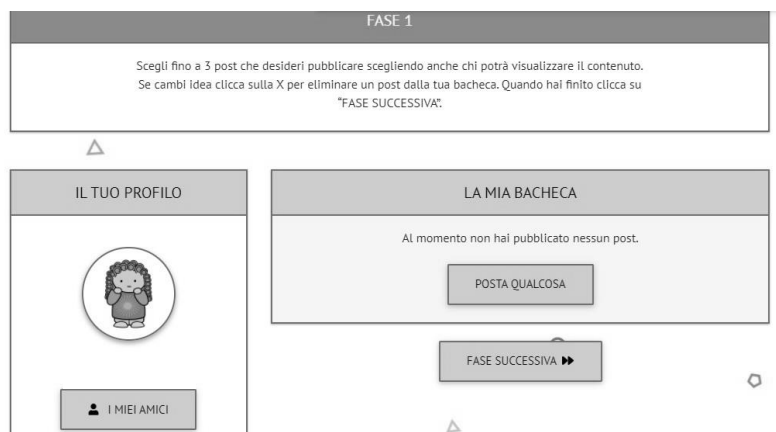
Technological devices are used throughout educational systems to support a diversity of forms of educational provision from kindergartens to work-based training. Within the institutional contexts of school, much effort is put into the use of classroom technologies alongside the increasing use of “blended” forms of online and offline provision of teaching as well as fully “virtual” provision. Indeed, “virtual schooling is now a growing feature of school systems” (Selwyn, 2013, p. 6). In this scenario, various projects have been implemented in Italy to increase the use of classroom technologies and empower students with digital skills thanks to the financings provided by the Fund for the Digital Republic,

As regards the projects focused on *training on traditional technologies*, the Fund for the Digital Republic financed *Social4School*, a project carried out by the University of Turin with the financial support of the Turin saving bank foundation, aiming at making children and young people understand the mechanisms and risks involved in the use of social networks through games. *Social4School* is, therefore, a web application that allows primary and secondary school students to experience the typical dynamics of a social network through a realistic interactive simulation. Furthermore, under the supervision of the teachers, the students who participate simultaneously are connected to each other and, through the various phases of the “game”, can choose the phrases to post, as well as share content or “like” the posts published by their classmates.

The goal of the project is to make children and young people aware of the importance of respecting privacy by showing how every single action can have an unexpected diffusion on the internet. The project, thus, proposes a participatory approach to address the issue of digital citizenship education, giving pupils and teachers the opportunity to experience in practice, albeit in a controlled environment, how information is disseminated on a social network and reflect on every single action thanks to a

detailed report of the game action. The activities of *Social4School* also focus on educational workshops dedicated to the correct use of information on the web.

**Figure 7.1 Social4School demo**



Source: Social4School website, <https://www.social4school.net/#/demo/login>.

Moreover, as regards the empowerment of girls and women in digital skills, the *Fuzzy Brains* association promotes *digital literacy workshops* to consolidate digital knowledge but also to orient oneself in the world of work. For the organizers, the workshops are not just practical laboratories but

“a journey to discover a professional environment from which women are often excluded but which can offer a great deal”.

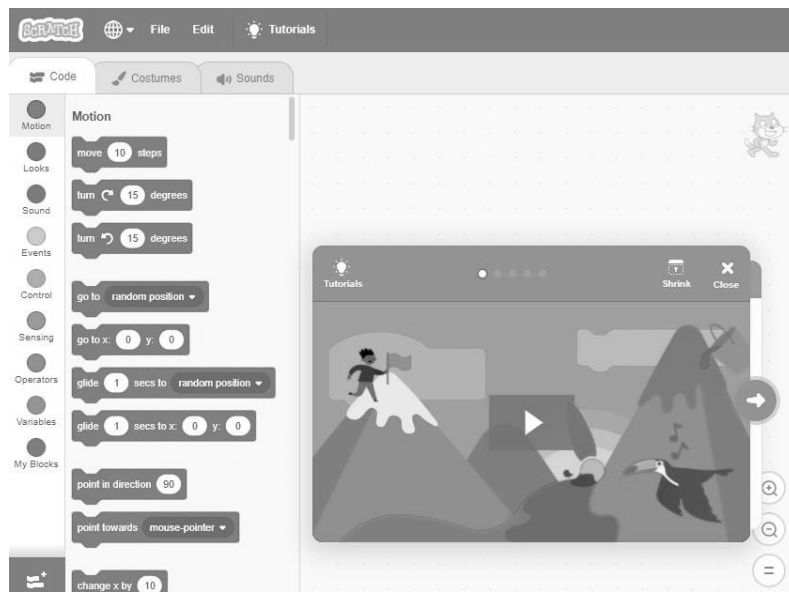
For this reason,

“the workshops are not only practical sessions, but also opportunities for exchange and networking in which the participants can get in touch with the positive experiences of girls already active in the sector, with local communities with which to establish contact to integrate into the technological environment, and recruiters of companies [...] that can offer them job opportunities.” (Repubblica Digitale website<sup>47</sup>).

As regards *training on innovative digital technologies*, Hewlett Packard Enterprise initiative aims to bring children closer to the world of *coding*, disseminating this experience into as many schools as possible and encouraging children to become “digital producers”. Hewlett Packard Enterprise also joins CoderDojo, a global non-profit movement born in 2011 in Ireland that aims to promote coding among children. A CoderDojo is a free and open club where young people aged 8 to 16 learn to program with the support of a group of volunteers, to use digital technologies in an aware way, to present and share their work and to collaborate with others.

<sup>47</sup> [https://repubblicadigitale.innovazione.gov.it/iniziativa/fuzzy-brains-aps\\_laboratori-di-alfabetizzazione-digitale/](https://repubblicadigitale.innovazione.gov.it/iniziativa/fuzzy-brains-aps_laboratori-di-alfabetizzazione-digitale/)

**Figure 7.2 Scratch platform demo**



**Source:** Scratch platform website, <https://scratch.mit.edu/projects/editor/?tutorial=getStarted>

The most used tool to learn coding is Scratch, a platform that allows kids to program a multimedia presentation or a small video game in a few hours. The training sessions are delivered by experienced Hewlett Packard Enterprise staff as part of their company volunteering programs, through dissemination methods consolidated by the international CoderDojo Foundation.

**Figure 7.3 Announcement of an HP-sponsored online event for students on coding**



**Source:** website of Hewlett Packard Enterprise

Furthermore, conceived by the La Tuscia University of Viterbo, the *Vrailexia* project was born with the aim of providing support to university students suffering from dyslexia. Its central objective is to implement a digital platform, *BESPECIAL*, capable to predict which are the best tools and support strategies for each student. In a first phase, *BESPECIAL* grouped students with similar characteristics, identifying the best methodologies for each group, using machine learning algorithms. These tools and strategies were then personalized starting from student's feedback. As a continuation of the project, the

most effective digital tools will be implemented in the application named Reasy, providing each user with the most congenial tools to facilitate study and improve their own learning process.

**Figure 7.4 Advertisement of the Vrailexia project**



Source: Vrailexia project website, <https://vrailexia.eu/the-project/io2-be-special-2/>

Despite the *Vrailexia* project is primarily aimed at university students with dyslexia, its results could be exploited by secondary school students, teachers and workers in the university sector. In fact, in addition to digital tools to support dyslexic students, *Vrailexia* has among its objectives the drafting of a memorandum of understanding for the creation of a network of inclusive universities.

As regards projects focused on training on innovative technologies, *Teens4Kids* is based on peer-to-peer teaching by secondary school students to primary school students on the subject of creative digital education. To date it has involved over 1,000 students from the cities of Marsala, Pantelleria and Trapani in Sicily. As part of a year of alternation between school and work, the project promotes technical skills (coding, 2D and 3D printing, 3D modeling, laser cutting, robotics) and transversal skills (creative pedagogy, project management, entrepreneurship, teamwork). By transmitting the technical skills acquired to primary school students, secondary school students learn to see digital as creative tool for creating innovative business solutions (Repubblica Digitale website<sup>48</sup>). Moreover, according to Selwyn (2011):

“The distribution of educational opportunities via technology, it is suggested, can help overcome the barriers that deter people from taking part in learning. Digital technologies may do this by making learning provision more flexible, bringing costs down, making learning more accessible, offering reliable and accessible information, and allowing people

<sup>48</sup> [https://repubblicadigitale.innovazione.gov.it/iniziativa/fab-lab-western-sicily\\_teens4kids/](https://repubblicadigitale.innovazione.gov.it/iniziativa/fab-lab-western-sicily_teens4kids/)



to learn on an 'any place, any pace' basis. This is seen to embody the ideal of 'lifelong learning' that many governments and educators are striving to establish." (p. 28).

In conclusion, digital technologies are playing an increasing role in the administration of educational data, and in the organization of classrooms and online courses (Williamson, 2016). The Covid-19 health crisis, in particular, has represented a point of acceleration in the rethinking of the digitalization of education. In fact, during the pandemic, educational practices and European policies in the field have been affected by an acceleration in the implementation of digitalization. Finally, digital technologies and platforms have also provided emergency solutions for making possible a form of education at a distance, in a situation where social distancing has become the basic norm (Taglietti et al., 2021).

## **7.2 Italian policies for inclusive digital technologies**

In this paragraph, I deepen the social background from which Italian policies aimed at empowering students in digital skills originate, in order to contextualize them. In the next sections, I will explain how the recent Digital Economy and Society Index (DESI) report of 2022 summarized the performance of the member states in some digital dimensions, in order to monitor their progress in digitalization. The report reveals an uneven digitalization process in EU countries. In particular, Italy ranks the 18<sup>th</sup> position out of 27 member states, although it is making progress to close the gap with the EU by implementing several measures to accelerate the digital transformation.

As regards human capital, Italy is in the 25<sup>th</sup> position, yet more than half of Italians do not have basic digital skills. In the following sections, I illustrate the Italian strategy to empower citizens with digital skills, whose low rank has forced the Italian government to implement policies for their improvement among the population.

### **7.2.1 The Italian digital performance in basic and advanced skills**

The DESI is a composite index that summarizes relevant indicators of Europe's digital performance and tracks the evolution of EU member states. Since 2014, the European Commission has been monitoring member states' progress in digitalization and publishes the DESI annual reports. Each year the reports include country profiles, which help the different countries identify priority areas for action. The DESI also ranks member states according to their relative progress over the last five years, considering their starting point.

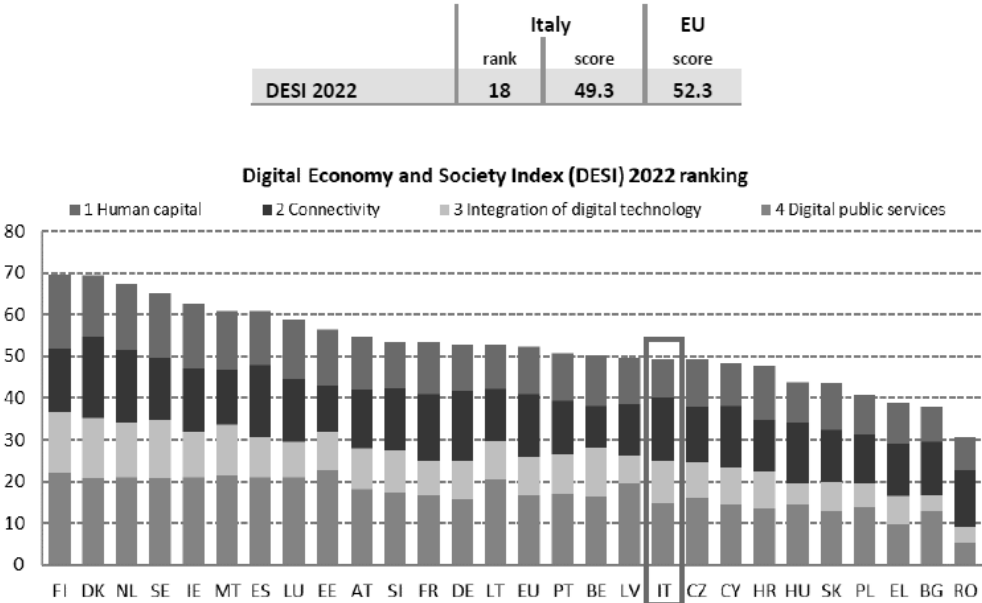
**Figure 7.5 Digital Economy and Society Index 2022**



Source: website of the European Union, <https://digital-strategy.ec.europa.eu/en/policies/desi>

What emerges from the DESI 2022 is that digitalization in the EU is uneven, although there are signs of convergence. Moreover, there is a sizable group of member states that cluster around the EU average. Importantly, most of the member states that had a lower level of digitalization are progressing at a faster pace than the others, indicating a general convergence in digitalization across the EU.

**Figure 7.6 Digital Economy and Society Index 2022 ranking**

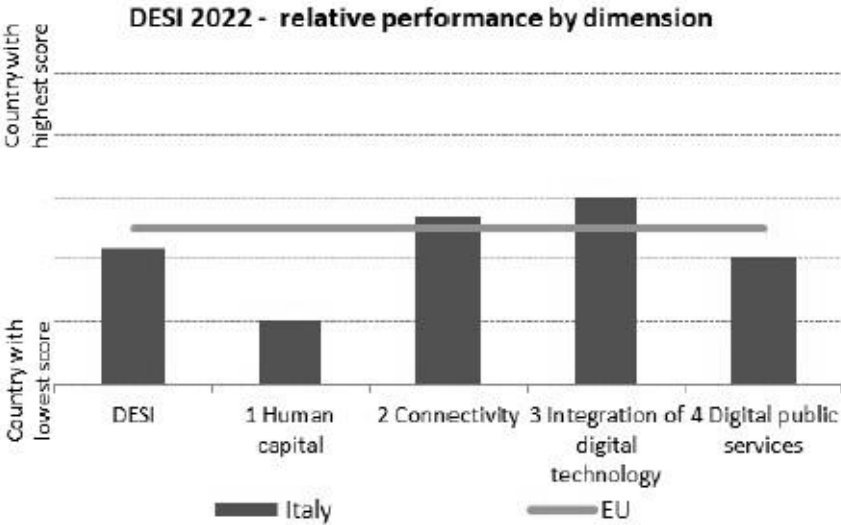


Source: European Union, [website https://digital-strategy.ec.europa.eu/en/policies/desi-italy](https://digital-strategy.ec.europa.eu/en/policies/desi-italy)

As anticipated in the introduction to this paragraph, Italy ranks 18th out of 27 EU member states in the 2022 edition of the DESI. However, the country is catching up and, looking at the development of its DESI score over the past five years, it is advancing at a remarkable pace. Recently, in fact, digital issues have gained political traction, especially with the establishment of a Ministry responsible for digital affairs and the adoption of different key strategies and the launch of several policy measures.

Therefore, looking at the 2022 indicators, Italy is closing the gap with the EU, yet still more than half of Italians lack at least basic digital skills. The share of digital specialists in the Italian workforce is also below the EU average and future prospects are undermined by low enrollment and graduate rates in the ICT sector. To bridge this gap, looking at policy developments, Italy has intensified its focus on digitalization and implemented numerous measures to foster the country's digital transformation. Furthermore, as part of the recent National Strategy for Digital Skills (Strategia Nazionale per le Competenze Digitali) and the related operational plan, the activation and strengthening of initiatives to support the development of digital skills continues. In fact, the government has recently set up the Fund for the Digital Republic (Fondo per la Repubblica Digitale), which promotes initiatives to increase the levels of digital competences. These policy interventions will be examined in the next sections.

**Figure 7.7 Digital Economy and Society Index 2022: performances by dimension**



Source: Digital Economy and Society Index 2022, <https://digital-strategy.ec.europa.eu/en/policies/desi-italy>

### **Box 7.2 TOP (Tutoring Online Program) improving students' digital performance**

The philanthropic challenge of the TOP project, implemented by the Fondazione Cariplo, is to reduce the loss of knowledge and skills in students (learning loss) through the support of self-study and the distribution of digital packages.

In Italy, the forced transition to distance learning, during the Covid-19 health crisis, in combination with the lack of digital equipment for online teaching, has led to a loss of skills and knowledge especially in the most fragile students. The Fondazione Cariplo has therefore decided to intervene starting from an experiment launched in 2020 at the Laboratory for an effective fight against poverty Policies (LEAP) of the Bocconi University, with the collaboration of the University of Harvard and the support of the Bicocca University.

In the first school year (2020-2021), the TOP project developed in two editions on a national basis, assisting middle school pupils with greater learning difficulties with a personal voluntary tutor, identified among the students of the Bocconi, Bicocca and State University of Milan. The evaluation of the project highlighted the effectiveness of the intervention, which improved both the academic performance and the psychological and socio-emotional well-being of the pupils involved, emphasizing the importance of peer-education on personal growth of students.

Fondazione Cariplo, in collaboration with the Bocconi and Bicocca University and the Italian Help Centre for Childhood, (CIAI, Centro Italiano Aiuti all'Infanzia), has relaunched the initiative in its reference area for the 2021-2022 school year, with the aim of consolidating and scaling the model. The second edition of the program envisaged an increase in the number of beneficiaries up to 2,500 minors and an update of the training courses and support for tutors.

Tutoring activities were also integrated with the distribution of digital packages (computers and data connection lines) to overcome the digital divide. Furthermore, thanks to the continuous collaboration with the Regional Coordination Committee of the Lombard Universities (CRUL, Comitato Regionale di Coordinamento delle Università Lombarde), the number of universities involved in the initiative has been increased (Fondazione Cariplo, 2022b).

**Figure 7.8 Digital Economy and Society Index Italy 2022: human capital**

1 Human capital	Italy		EU
	rank	score	score
DESI 2022	25	36.6	45.7

	Italy			EU
	DESI 2020	DESI 2021	DESI 2022	DESI 2022
<b>1a1 At least basic digital skills</b>	NA	NA	<b>46%</b>	<b>54%</b>
% individuals			2021	2021
<b>1a2 Above basic digital skills</b>	NA	NA	<b>23%</b>	<b>26%</b>
% individuals			2021	2021
<b>1a3 At least basic digital content creation skills<sup>4</sup></b>	NA	NA	<b>58%</b>	<b>66%</b>
% individuals			2021	2021
<b>1b1 ICT specialists</b>	<b>3.5%</b>	<b>3.6%</b>	<b>3.8%</b>	<b>4.5%</b>
% individuals in employment aged 15-74	2019	2020	2021	2021
<b>1b2 Female ICT specialists</b>	<b>15%</b>	<b>16%</b>	<b>16%</b>	<b>19%</b>
% ICT specialists	2019	2020	2021	2021
<b>1b3 Enterprises providing ICT training</b>	<b>19%</b>	<b>15%</b>	<b>15%</b>	<b>20%</b>
% enterprises	2019	2020	2020	2020
<b>1b4 ICT graduates</b>	<b>1.3%</b>	<b>1.3%</b>	<b>1.4%</b>	<b>3.9%</b>
% graduates	2018	2019	2020	2020

Source: Digital Economy and Society Index 2022, <https://digital-strategy.ec.europa.eu/en/policies/desi-italy>

In conclusion, the lack of digital skills represents one of the main obstacles to the development of Italy, and takes on the characteristics of a priority for various reasons: it negatively impacts the offer of digital services by the public and private sector, and access and use by part of citizens; exposes a significant part of the population to the risk of social exclusion and exclusion from the labour market; hinders access to forms of public participation and consultation; increases the risk of public exposure to large-scale disinformation.

### **Box 7.3 The NEETWORK project offering training opportunities for young people**

Fondazione Cariplo, through the NEETWORK project, intends to intercept and motivate 500 NEETs (young people “Not in education, employment and training”), who run the risk to be excluded from the world of work and being on the margins of society, through internships and digital training. The beneficiaries of the project are young people between the ages of 18 and 24, in possession of a lower secondary school diploma at most, unemployed for at least three months, not enrolled in the Youth Guarantee (Garanzia Giovani), the EU program which intends to guarantee young under 30 who do not study and do not work to acquire new skills and enter the world of work.

The project envisages the expansion and the experimentation of NEETs interception social channels (Facebook, Instagram, etc.) and the offer of a “package of opportunity” for the approach to the world of work consisting of:

- orientation courses and strengthening of group skills;
- online training on digital transformation;
- paid traineeships in both non-profit organizations and for-profit companies.

NEETs are contacted by employment agencies and, once enrolled in the project, receive the support of psychologists and begin to work for a paid 4-6 month paid internship. The second phase of the initiative also saw the collaboration with the Vodafone Foundation's LV8 project, aimed at transferring certified digital skills through an online game.

The project is carried out in collaboration with the Lombardy Region, the Adecco Foundation, Lombardy Trades Consortium (Consorzio Mestieri Lombardia) and the Toniolo High School. Fondazione Cariplo is the promoter and creator of the project as well as the main financier, having allocated resources for €1.6 million. At date, 78 third sector organizations have joined the project offering 76 apprenticeship positions, which have occupied 282 young people (Fondazione Cariplo, 2022b).

## **7.2.2 The National Strategy for Digital Skills**

Digital technologies are increasingly defining most forms of contemporary education. Today, schools are oversupplied with digital devices, platforms and applications, so it is impossible to imagine the future of education without computerized technologies at the centre (Selwyn, 2017). In this scenario, the Italian National Plan of Recovery and Resilience amounts to €191.5 billion, of which 25.1% (€48 billion) has been earmarked for digitalization (European Commission, 2022a). Reforms and investments associated with the expected targets to be achieved in 2022 include:

- promoting the digitalization of schools through the initiative called School 4.0 (Scuola 4.0);
- improving the vocational training through the reform of the tertiary vocational training system of the Higher Technical Institute;
- strengthening the system of research, which could cover fields such as advanced simulation, big data, industry 4.0 and artificial intelligence (AI).

Moreover, according to the 2021 Italian DESI report, to reduce the existing gap, the National Strategy for Digital Skills was implemented in 2020 as:

"an important milestone and an opportunity" to bridge the digital divide and as a policy tool to define a comprehensive approach to digital skills development in order to fulfill the gaps with other EU member states (European Commission, 2021b, p. 6).

Approved by the Minister for Technological Innovation and Digital Transition as part of the programme Digital Republic (Repubblica Digitale), the strategy constitutes an organic and multi-sector safeguard for the development of a digital society, aiming at reducing the distances with other European countries, breaking down territorial differences and promoting education in future technologies. The basic principles of the strategy are summarized in Table 7.2.

**Table 7.2 Basic principles of the National Strategy for Digital Skills**

Basic principles of the Strategy for Digital Skills	Interventions
<b>Digital Education</b>	Fighting all forms of digital illiteracy through schools, universities and the mass media
<b>Digital Citizenship</b>	Fostering the development of a new form of citizenship based on quality information through digital technology  Designing digitalization with attention to citizens' rights to share a common language in the dialogue with public administrations and business
<b>Ethical, humane and non-discriminatory digitalization</b>	Making digitalization a space for equality and development of communities and individuals  Removing any obstacle of social, economic, geographical, technological and cultural nature in the use of public and private digital services

In order to monitor the progress and evaluate the effectiveness of the strategy to improve digital skills, a dashboard of performance indicators is provided in the operational plan, starting from the indicators

included in the DESI and the Digital Maturity Indexes (DMI)<sup>49</sup> elaborated by the Digital Agenda Observatory of the Polytechnic University of Milan. Moreover, four axes of intervention were identified, illustrated in Table 7.3.

**Table 7.3 Axis of interventions of the National Strategy for Digital Skills**

<b>Axis of intervention</b>	<b>Actions</b>
<b>Higher education and training</b>	Developing digital skills within formal education cycles for young people, with the coordination of the Ministry of Education and the Ministry of University and Research
<b>Active workforce</b>	Ensuring adequate digital skills in both the private and public sectors with the coordination of the Ministry of Economic Development and the Ministry for Public Administration
<b>ICT specialist skills</b>	Strengthening the citizens' skills for new jobs, linked to emerging technologies, with the coordination of the Ministry of University and Research and the Ministry of economic development
<b>Citizens</b>	Developing the digital skills necessary to exercise citizenship rights and conscious participation in democratic life, with the coordination of the Ministry for Technological Innovation and Digitalization

In conclusion, the lack of digital skills can be considered a factor that exposes a significant part of the population to the risk of social exclusion, limiting citizens' access to forms of active participation and increasing the risk of disinformation. Therefore, an inadequate level of digital skills is a critical element as it not only affects the private life of citizens, but also has an impact on their access to the digital environment.

### **7.2.3 The Fund for the Digital Republic aiming collaboration between stakeholders**

The Digital Republic program was created with the collaboration of ministries, regions, provinces, municipalities, universities, research institutes, professionals, media and associations. It represents the national strategic initiative for the empowerment in digital skills and details three conditions of sustainable evolution: the population increasingly acquires digital awareness and is therefore able to

<sup>49</sup> The Digital Maturity Indexes are indicators for measuring the digital transformation of member states, aiming to provide useful indications to policy makers.



make the most of the benefits of digitalization; public administrations and business are encouraged to improve the services provided, putting users at the centre; the educational system is organized to facilitate the development of digital skills in a logic of continuity in the training path between the different phases of personal and working life.

Furthermore, in order to increase the digital skills of Italians by supporting projects aimed at digital inclusion, on 29 January 2022, the at date Minister for Technological Innovation and Digital Transition, Vittorio Colao, the Minister of Economy and Finance, Daniele Franco, and the President of ACRI, Francesco Profumo, signed a memorandum of understanding which defined the methods of intervention of the Fund for the Digital Republic.

The fund intends to intervene in the period 2022-2026, borrowing the positive experience of the Fund for the contrast of educational poverty of minors, established in 2016 thanks to a partnership between government, banking foundations and the Forum of the Third Sector<sup>50</sup> (Forum Terzo Settore), aimed at selecting projects to be financed through tenders in which public entities and non-profit organizations can participate, alone or in partnerships.

The fund for the Digital Republic is fueled by payments made by banking foundations, for a total amount estimated at approximately €350 million. The governance of the fund includes a Strategic Steering Committee, made up of 6 members, jointly designated by the government and ACRI, who are responsible for defining strategic lines, intervention priorities, project evaluation processes, and an independent Scientific Committee, which is entrusted with the task of monitoring and evaluating the effectiveness of the financed interventions. As reported on the ACRI website<sup>51</sup>, the Minister for innovation and digital transition, Colao, argues:

“The digitalization objectives included in the National Plan of Recovery and Resilience are very ambitious [...] the National Plan of Recovery and Resilience invests significant resources in digital infrastructures, such as connectivity and the cloud. But no transformation can happen if we don't even invest in people. Another key initiative of the National Plan of Recovery and Resilience starts today with the Fund for the Digital Republic, created to accompany people and families who have greater difficulty in accessing digital technology.”

Moreover, the President of ACRI, Francesco Profumo, declares:

"The digital transition is a very important step in the modernization of the country and the Fund for the Digital Republic will allow the activation of projects aimed at ensuring that this revolution takes place without leaving anyone behind. This is a very ambitious initiative, to which the banking foundations are happy to participate. Strengthened by the experience of the Fund for the contrast of educational poverty of minors [...] we are sure that also the Fund for the Digital Republic will be able to call gathering the best energies of the territories,

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<sup>50</sup> The Forum of the Third Sector is a non-profit organization and the main representative body of the Italian non-profit sector. It was established on 19 June 1997 and represents 101 national organizations of the third sector, which operate in the fields of volunteering, social cooperation, ethical finance and fair trade.

<sup>51</sup> <https://www.acri.it/2022/03/03/nasce-il-fondo-per-la-repubblica-digitale/>

to activate a widespread process of growth of digital skills, a very important way to restart the country, mitigating inequalities that risk of getting worse."

In conclusion, as illustrated the Fund for the Digital Republic builds networks animated by diverse relationships and exchanges. Funding is fundamental but, in a different way, agreements between various types of stakeholders from the new philanthropic and institutional sectors are also central (Junemann et al., 2016).

### **7.3 European Union policies for an inclusive information society**

This paragraph examines European policies aimed at empowering citizens in digital skills, with a focus on interventions intended to pursue social inclusion through the creation of the European information society. Therefore, the sections elaborate on the actions implemented by the recent European Declaration on Digital Rights and Principles, aiming for a human-centred digital change through the empowerment of citizens, so as to allow them to enjoy the opportunities offered by digital technologies, such as participation in the digital public space.

The paragraph also explains how the policies implemented by the EU to empower citizens in digital skills have "influenced" the member states, i.e. Italy, in the view of the Europeanization process, in the adoption of measures to improve digital competences.

#### **7.3.1 The information society at the head of the political agenda of the EU**

"Contemporary society is run increasingly along digital lines. In many parts of the world, people lead lives that are conditioned by an array of digital systems, digital devices and digital practices." (Selwyn, 2017, p. 106). The information society is defined as the emerging model of socio-economic development, reflecting the qualitative changes in the organization of human activities, whether professional, private or institutional, due to the continuous evolution of ICT. In fact, technological and economic developments have brought society from the "industrial" to the "information" age, characterized by the rapid progress in digital technologies and accelerated economic globalization (European Parliament, 2003).

In this scenario, European institutions have seized the possibility of advanced technologies to improve the living conditions of citizens and their potential for educational change. Therefore, at the European level the concept of "information society" has developed reflecting the broader social transformation envisaged by the communications revolution, through the implementation of policy initiatives introduced in Table 7.4.

**Table 7.4 EU policies to achieve social transformation through digital technologies**

Policy initiatives	Objectives
<p align="center"><b>First Action Plan: Europe's Way to the Information Society</b></p>	<p>Implemented in 1994 to define the operating principles, policies and projects aimed at ensuring international cooperation in reaching the objectives of the information society</p>
<p align="center"><b>Second Action Plan: Rolling Action Plan</b></p>	<p>Adopted in 1996 to improve business as a key priority through the enactment of the liberalized telecommunications environment and the application of the principles of internal market, including strengthening the importance of investment in education</p>
<p align="center"><b>Third Action Plan</b></p>	<p>Launched by the Lisbon European Council of 23 and 24 March 2000, to recognize the urgent need for Europe to rapidly exploit the opportunities of the new economy</p>
<p align="center"><b>Fourth Action Plan: e-Europe 2005 Action Plan</b></p>	<p>Established by the Sevilla European Council of 21 and 22 June 2002 as part of the Lisbon strategy to make the EU the most competitive and dynamic knowledge-based economy with improved employment and social cohesion by 2010</p>

Source: adapted from (European Parliament, 2003).

However, despite the measures to increase the diffusion of IT, in 2007 millions of EU citizens were not able to gain the full benefits of digital technologies. Older persons, people with disabilities and people living in remote rural areas were among the ones at risk of being left behind. In fact, the European Commission states:

“We must be vigilant as these technologies, which promise to connect us, also risk creating a social divide between those who can access and use them and those who cannot.”  
(European Commission website<sup>52</sup>).

In this context, e-inclusion, that is inclusion in the digital environment, points to the necessity for everyone to be actively engaged with society, through affordable access to technologies, usability of ICT tools, services and skills. E-inclusion can also deliver tangible benefits to citizens such as improved skills, increased quality of life and better access to information and engagement in public issues, through e-participation. It can also leverage untapped skills and stimulate the creativity of marginalized youth (European Commission, 2007b).

In the European Commission communication entitled "European i2010 initiative on e-Inclusion. To be part of the information society" (European Commission, 2007a), e-inclusion is also defined as actions to achieve an inclusive information society, that is, an information society for all. The aim of the communication is to implement a digital strategy to enable every person who wishes to participate in the information society, regardless of individual or social disadvantages. Table 7.5 introduces further key policy interventions in the field of digital technologies to build an inclusive information society in Europe.

<sup>52</sup> [https://ec.europa.eu/information\\_society/doc/factsheets/012-eaccessibility.pdf](https://ec.europa.eu/information_society/doc/factsheets/012-eaccessibility.pdf)

**Table 7.5 EU policies for e-inclusion in the information society**

<b>EU policies for information society</b>	<b>Date of implementation</b>	<b>Objectives</b>	<b>Commitments for the member states</b>
<b>Council resolution on the implementation of the e-Europe 2005 Action Plan (2003/C 48/02)</b>	21/22 June 2002	Providing citizens with the skills needed to live and work in the new information society, through an inclusive approach (e-inclusion)	Promoting e-government, e-business, e-health and e-learning, taking into account specific national, institutional and administrative structures
<b>Communication: “i2010 – A European Information Society for growth and employment”</b>	1 June 2005	Promoting an open and competitive digital economy  Emphasizing ICT as a driver of inclusion and quality of life	Achieving an Inclusive European Information Society in accordance with sustainable development ideas
<b>Commission calls for an all-inclusive digital society</b>	29 November 2007	Providing freedom of choice through ICT designed to be used by everyone regardless of their personal or social situation in order to reduce social disparities	Enabling everyone to take part in the information society by bridging the accessibility, broadband and competence gaps;
<b>Communication: Digital Agenda for Europe</b>	19 May 2010	Promoting a European way for the digital transformation, built on European values and EU fundamental rights	Proposing by 2013 EU-wide indicators of digital competences and media literacy
<b>Communication: Digital Single Market Strategy for Europe</b>	6 May 2015	Creating the right conditions for digital networks and services to flourish; maximizing the potential growth of the European Digital Economy	Implementing a strong, competitive and dynamic telecoms sector to leverage innovations such as Cloud computing and Big Data tools
<b>Commission priorities for the period 2019-2024</b>	June 2019	80% of EU population should have basic digital skills by 2030	Strengthening EU digital sovereignty  Setting standards, with a focus on data, technology, and infrastructure
<b>Communication: Shaping Europe’s Digital Future</b>	19 September 2020	Empowering citizens to make them taking better decisions based on non-personal data available to all, whether public or private subjects	Supporting business-to-business data sharing, addressing issues related to usage rights for cogenerated data, such as industrial data

### 7.3.2 European policies promoting inclusive digital education

As stated by the European Commission in 2013, at that time the world of learning and teaching in Europe was still traditional. In the speech for the launch of the programme “Opening up Education’ - Making the 21st century classroom a reality”, it was declared that:

“In order to reshape education in Europe successfully, learners should engage in more personalization, collaboration and better links between formal and informal learning, with the help of teachers who are confident in sharing educational contents. Learning can’t anymore be confined to specific classrooms and timetables but takes full advantage of technology to break boundaries and learn across cultures, ages, and geographical devices.” (European Commission, 2013b).

As a result, the European Commission had set up an agenda to structure the opportunities drawn from the digital evolution in education. This agenda engaged stakeholders, such as educational institutions, policy-makers, the learning industry, teachers, parents and children, through a series of concrete actions: open learning environments and educational resources; connectivity; concerted actions. In pursuing these goals, the Commission has called for educational systems to be accessible and offer equal opportunities to all, regardless of a person's background (European Commission, 2016b).

Among the latest initiatives of the European Commission (2018) in the field of digitalization of education, the first Digital Education Action Plan was released in January 2018, focusing on the:

“implementation and on the need to stimulate, support and scale the targeted use of digital and innovative educational practices.” (p. 4).

The plan draws on a wide range of education and training stakeholders, including business, research, NGOs and non-formal education, involving connectivities that are political, financial, technological and social (Junemann et al., 2016).

Recently, in the context of the EU's digital transformation, the European Declaration on Digital Rights and Principles for the Digital Decade for human-centred digital change was implemented to steer the digital transformation and ensure that people are empowered to enjoy the opportunities offered by the digital decade<sup>53</sup>. The declaration was signed by the Presidents of the European Parliament, the Commission and the Council in December 2022, reflecting the shared political commitment towards digital change:

“The draft declaration covers key rights and principles for the digital transformation, such as placing people and their rights at its centre, supporting solidarity and inclusion, ensuring the freedom of choice online, fostering participation in the digital public space, increasing safety, security and empowerment of individuals, and promoting the sustainability of the digital future.” (European Union website<sup>54</sup>).

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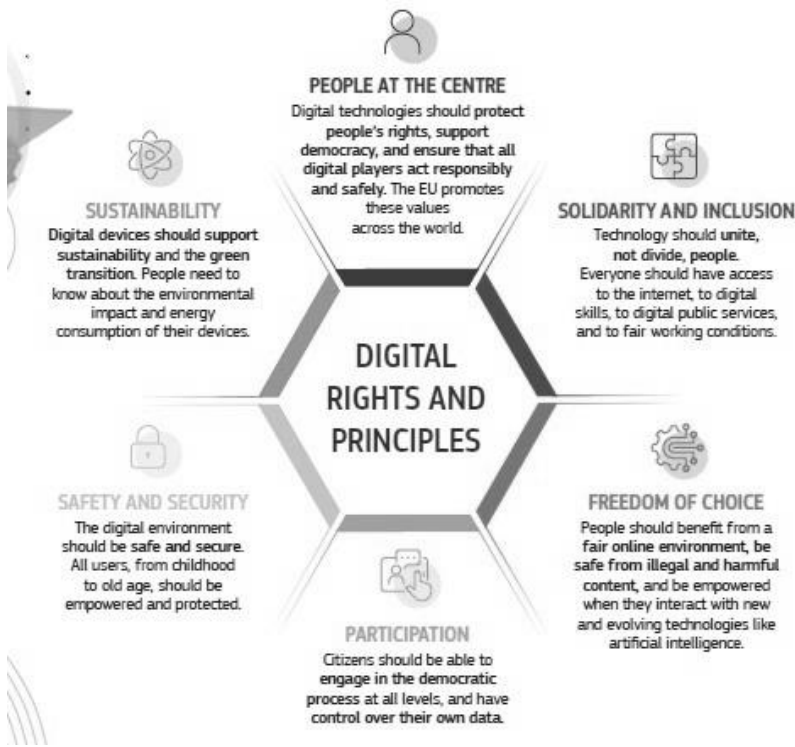
<sup>53</sup> In March 2021, the European Commission published the “2030 Digital Compass: the European Way for the Digital Decade communication”, which sets out the long-term strategy for the digital transformation of the EU.

<sup>54</sup> [https://ec.europa.eu/commission/presscorner/detail/en/IP\\_22\\_452](https://ec.europa.eu/commission/presscorner/detail/en/IP_22_452)

Furthermore, as the European Declaration on Digital Rights and Principles for the Digital Decade states:

“The EU vision for digital transformation [...] empowers individuals and fosters innovative businesses. [...] The Union way for the digital transformation of our societies and economy should encompass digital sovereignty, inclusion, equality, sustainability, resilience, security, trust, improving quality of life, respect of people’s rights and aspirations and should contribute to a dynamic, resource-efficient and fair economy and society in the Union.” (European Commission, 2022b).

Figure 7.9 Rights and principles of the European digital strategy



Source: European Union website, <https://digital-strategy.ec.europa.eu/en/library/digital-rights-and-principles-factsheet>

Furthermore, the European Declaration on Digital Rights and Principles for the Digital Decade builds on the Treaty on EU, the Treaty on the Functioning of the European Union and the Charter of Fundamental Rights. Finally, it complements the European Pillar of Social Rights. Its key principles are summarized in Table 7.6.

**Table 7.6 The interventions of the Declaration for Digital Rights and Principles focused on inclusive technologies**

<b>Principles of the Declaration</b>	<b>Actions</b>	<b>Commitments of the member states</b>
<b>Putting people at the centre of the digital transformation</b>	Ensuring everyone's access to technology aiming at uniting people	Strengthening the democratic framework for a digital transformation that benefits everyone and improves the lives of all Europeans
<b>Solidarity and inclusion</b>	Creating a fair society and economy in the EU through digital transformation	Making sure that technological solutions respect people's rights and promote inclusion  Promoting a digital transformation that leaves nobody behind and includes elderly people, persons with disabilities, or marginalized people
	Guaranteeing the right to education, training, lifelong learning and to acquire basic and advanced digital skills	Promoting efforts to equip all education and training institutions with digital connectivity, infrastructure and tools  Supporting efforts that allow learners and teachers to acquire and share all necessary digital skills to take an active part in the economy, society and democratic processes
<b>Freedom of choice</b>	Empowering everyone to benefit from the advantages of AI by making their informed choices in the digital environment	Making everyone able to effectively choose which online services to use, based on objective, transparent and reliable information  Ensuring a safe, secure and fair online environment where fundamental rights are protected
<b>Participation in the digital public space</b>	Safeguarding access to a trustworthy and multilingual online environment, in order to contribute to a pluralistic public debate in which everyone can participate	Supporting the development and best use of digital technologies to stimulate citizen engagement and democratic participation
<b>Safety, security and empowerment</b>	Ensuring everyone's access to digital technologies, products and services that are safe, secure and privacy-protective	Countering and holding accountable those that seek to undermine the integrity of the Europeans' online environment
<b>Sustainability</b>	Guaranteeing everyone's access to accurate, easy-to-understand information on the environmental impact and energy consumption of digital products and services	Supporting the development and use of sustainable digital technologies that have minimal environmental and social impact

## **7.4 Conclusion**

According to the analysis of advocacy strategies in education provided later in Chapter 10, which considers the importance to empower students in digital skills, in this chapter I have explored the policy-scape in which these investments have taken place in order to contextualize them.

I then focused on the indicators of the digital skills development in Italy, underlying how the data from the DESI 2022 report illustrated the country's low performance in the sector. Therefore, in Italy, the consequent implementation of policies to improve the development of digital competences has shown collaboration between ministries, local authorities, academic organizations, research institutes, business, consultants, media and associations, demonstrating how policy is currently being done in new ways, by a diverse range of actors with varied forms of participation, relationships, and interests involving advocacy, business, and new forms of philanthropy (Junemann et al., 2016).

Finally, the analysis provided in the chapter highlighted how the lack of digital skills, affecting a significant part of the population, can expose citizens to risks of social exclusion. New interventions are therefore necessary at national and European level to facilitate access to digital services and increase digital awareness to provide maximum benefits and an ethical evolution of the use of technologies.



## Conclusion of the second part

The previous chapters introduced the four advocacy strategies that emerged in the interviews with the employees of the new philanthropic organizations that are part of this thesis fieldwork, in the panorama of European education policies, in which these organizations interact to obtain funding from institutions or private entities. Hence, the policy-scape analysis presented was able to highlight the collaboration between actors from different social spheres: European and national institutions, new philanthropic organizations, local authorities (municipalities and regions), schools, etc.

The policy analysis was also useful to deepen the advocacy strategies adopted by new philanthropic organizations to achieve their social investment objectives. Further details were thus added to the empirical investigation and will be presented in the third part of the thesis. Therefore, in order to better examine the research question aimed at exploring how new philanthropic organizations promote social investment in European education by mobilizing their resources, different policies on social investment in education have been evaluated in the previous three chapters. Moreover, the analysis found that, “alongside its inroads into the school curriculum business philanthropy is also importing other forms of enterprising sensibilities into school organization through the dissemination of leadership and business practices.” (Ball & Junemann, 2011, p. 656).

Finally, the examination of the policy measures implemented by the EU institutions for a more inclusive educational system confirmed the positive role played by such policies in the process of modernization and improvement of the Italian school system. Therefore, it is advisable to promote these initiatives in the future, in order to achieve a more inclusive educational system within the framework of collaboration between organizations from different social and political sectors.

## **Part III**

### **Empirical inquiry: social investment strategies in Italian education**

## **Introduction of the third part**

The third part of the thesis comprises of a further 3 chapters which present the empirical data and discuss the implications of the findings. Specifically, the introduction of the data collected interlinks the methodological and theoretical approaches illustrated in the first part of the thesis. Indeed, using network ethnography and the concepts of nodes and edges, the dynamics of network governing in social investment strategies in European education are explored. In Chapter 8, an introduction to social investment strategies in European education is presented to understand how policy networks operate in the field, providing a theoretical perspective focused on network arrangements and exploring the roles exercised by central nodes, boundary actors and peripheral organizations inside these networks. Therefore, based on the findings introduced later in Chapter 9 and 10, three implications on social investment strategies in European education are illustrated to give meaning of the empirical investigation.

Chapter 9 introduces the findings concerning the first objective of the research, that is investigating the social investment strategies adopted by the new philanthropic organizations within the European digital education networks in which they are involved. The chapter also seeks to answer to the hypothesis related to this objective of the research: new philanthropic organizations promote social investment in European education through the digital education networks in which they are involved.

Chapter 10 examines the second objective of the research, that explores how new philanthropic organizations mobilize their financial resources in order to advocate for education. Therefore, the second hypothesis of the thesis relating to this objective is: new philanthropic actors give voice to a wide range of advocacy groups for social inclusion in education by mobilizing their resources. The focus of the second hypothesis is on the “funding” component of the relationship between education market and society. Furthermore, in the chapter I coin the results of the empirical study obtained through the interviews to some general literature concerning the current evolution of the education advocacy strategies and underline some dynamics of funding for advocacy. Finally, I present the four advocacy strategies in education emerged through the interviews with the employees of the new philanthropic organizations and introduced in the second part of the thesis in chapters 5, 6 and 7.

## Chapter 8

### **Social investment strategies in European education networks**

This chapter addresses the details of the methodological approach, with some of its limitations. It also outlines the theoretical contribution of the thesis in terms of implications for practitioners in social investment in education. Therefore, the chapter mixes the methodological and theoretical approaches at the base of the study, in order to summarize the salient points that form the empirical analysis subsequently illustrated in chapters 9 and 10.

The findings presented in the following two chapters show how the case studies Fondazione Cariplo and Passo dopo Passo...Insieme can be conceptualized in networks comprised of actors located in different public and private contexts. Moreover, the relationships between these actors have been significant in promoting dynamics of social investments and advocacy in education, particularly through the role of boundary actors, such as banking foundations. The chapter discusses the theoretical and methodological implications of these dynamics.

Three implications drawn from the findings of the empirical analysis are also introduced in the chapter. The first implication focuses on the evolution of new philanthropic organizations' priorities in the global governance of education and takes into account new processes in education introducing new players, practices, opportunities and authorities into public sector education. The second implication highlights the growing relevance of venture capital funds in social investment networks in education. In fact, new philanthropists bring financial investment from business philanthropy blurring the distinction between public, voluntary, philanthropic and for-profit sectors. The third implication illustrates the mutual definition of priorities between new philanthropic actors and policy-makers in education, who request corporate philanthropies to work with governments to solve educational problems.

#### **8.1 Reflections on social investment in European education**

In this first paragraph, I argue that a detailed understanding of how policy networks focused on social investment in education are structured and operate, as network arrangements of organizations, can explain some of the impacts of these investments.

Moreover, in the first section I provide a recapitulation of the theoretical perspective of the research. I also introduce the new philanthropy context, presenting some reflections on the main elements that compose it and focus on the roles exercised by central and boundary actors, who have emerged as protagonists in the networks of social investment in education, as explained in the next two chapters.

### **8.1.1 A policy network perspective**

A policy network perspective has been adopted as a theoretical framework that articulates the involvement of the new philanthropic organizations investing in education and provided a framework that addressed the dynamics of social investment in the field. As outlined in the first part of the thesis, the concept of network was central to this research and offered insights to explore social investment strategies and impacts.

Furthermore, the relationships between new philanthropists inside social investment networks were significant in promoting social investment through the development of financial relationships. However, the new philanthropic organizations studied were limited in scope to the national level. In fact, only in the initial exploratory phase of the empirical investigation 6 employees of European new philanthropic organizations were interviewed, while the entire research fieldwork was focused on Italian case studies.

In the two following empirical chapters, I will conduct ethnographic research on social investment promoted by new philanthropic organizations trying to adopt specific research methodologies. Consequently, a topological approach will be presented and elaborated in relation to network ethnography theories, in order to concretely effectuate education policy network research. This perspective will also provide an analysis of social investment strategies in education within the socio-political context of the changing relationship between private actors and state.

As explained in Chapter 2, the methodological approach adopted for the collection and examination of data was network ethnography. The method was used to combine processes to produce an account of social investment in European education. Moreover, linking processes to impacts on the educational system was challenging because of the numerous initiatives for social inclusion that were apparent through data collected.

Hence, this study demonstrates the value of using an ethnographic approach to researching education governance processes, as it provided the type of data collection necessary. There are also various benefits of case studies and ethnographies presented in this research. First, ethnographic approaches captured financial aspects of the researched organizations which were important because financial resources were an area of interest. Second, the ethnographic approach acquired detailed data about informal aspects of education governance through interviews. However, there were limits: some procedures of social investment strategies were not recordable due to the informal nature of the exchanges. In fact, some processes of social investment strategies in education occurred in specific arenas such as hearings, consultations and participation in working groups.

### **8.1.2 The new philanthropy context**

This thesis has used a policy network perspective to articulate in detail the social investment strategies of new philanthropic organizations in European education and subsequently introduces a way for an

ethnographic viewpoint to explain the impacts of social investments on the educational system. Therefore, according to the two objectives of the research, an explanation is provided that describes the social investment strategies in digital education networks and in advocating for social inclusion in education in the new philanthropic context, demonstrating that social investment impacts can be explained despite theoretical and methodological challenges.

However, what is important to take into account is that in spite of the efforts of the new philanthropic organizations' actions and various initiatives of private entities who exercise the role of boundary actors, overall public education appeared to have not improved in the last decades. The “wicked social problems” in the field of education (Ball & Junemann, 2012) that the new philanthropic organizations try to solve are complex and involve various types of stakeholders, who seek to bring solutions by catalyzing the private, voluntary and public sectors.

As regards the first objective of the research, that is investigating the social investment strategies adopted by new philanthropic organizations within the European digital education networks in which they are involved, the empirical study has demonstrated that the most part of these actors are linked through relationships mediated by boundary actors, such as banking foundations, which help create and maintain global education policy communities at the national level, and in some cases also at the European level. In addition, the investigation relating to the second objective of the study, focused on the mobilization of financial resources by new philanthropic organizations to advocate for education, involves “policy entrepreneurs” connected to policy-makers. Here, the empirical analysis has confirmed that the financial resources mobilized by new philanthropic organizations are crucial to implement initiatives towards childcare, quality in education, educational change and empowerment of students in digital skills, within the context of an emergent form of heterarchical governance of education.

### **8.1.3 Central nodes**

Education policy networks can be theorized as networks of organizations composed of central nodes and boundary actors. These networks are built on partnerships between organizations and are able to generate relationships between philanthropists, public authorities and business through calls for grants, consultations, hearings, participation in working groups, etc.

The central nodes have to be seen in their socio-political context as they are able to help “minor” organizations overcome obstacles in obtaining funds for their initiatives in education, for example by supporting the applications to call for grants from the European Commission. Within the education policy networks analyzed in this thesis, it was often central nodes that produced the largest amount of social investment through the search for partnerships, participation in virtues initiatives, project support and implementation of fundraising activities. Furthermore, as will be illustrated in Chapter 9, the Fondazione Cariplo case study adopts social investment strategies which consist in analyzing opportunities in a specific area, implementing feasibility plans based on investigations and studies, listening to research

institutes about their opinions on particular issues, achieving quantitative results on policy promotion and considering instrumentation as a catalyst for further business activities.

Moreover, network dynamics of social investment in Italian digital education governance tend to refer to relationships in networks in terms of engagement with governments in educational programmes, access to the highest level of policy activity by structuring partnerships with the Ministry of Education, networking with partners with whom to create social demand, acting as “eduspace” players by identifying investment funds, keeping a successful funding approach based on venture capital investments, strategic funding and risk taking (see Table 9.6 in Chapter 9 for a detailed presentation of network dynamics of social investment).

Central nodes can also be discussed in the literature in terms of their utility. Indeed, foundations are especially appropriate in education policy networks focused on social investments for being engaged at the national and European level and involved in community aspects of education governance at the same time. Furthermore, “minor” new philanthropic organizations used foundations to obtain funds and influence policy-making, indicating that this was not only appropriate for organizations that were less able to engage in formal governing spaces but that central nodes are used more widely in governance networks by peripheral nodes.

In addition, this study has explored the interactions and relationships in education policy networks which go beyond central nodes. In fact, the data presented in the following two chapters specifies that a theory of social investment strategies in education should recognize the position of “minor” actors and the importance of their role, especially the ability of some organizations to link others, and thus produce transformation in social investment dynamics. Hence, different network roles that are crucial for social investment dynamics occurred from the data: some actors have a role as enablers in the network. They can be considered as drivers of change by providing financial resources to implement projects proposed by “smaller” organizations. An introduction of the roles exercised by these actors inside the policy networks focused on social investment in education is provided in the next section.

#### **8.1.4 Boundary actors**

Particular new philanthropic organizations within the education policy networks examined were fundamental for the processes of social investment, as actors pursuing their own business and being based on specific philanthropic relationships and objectives. These are boundary organizations that tend to be actors in the education governance networks with particular characteristics.

They operate in numerous ways, shaping social investment networks in education by creating bridges between different new philanthropic organizations and peripheral areas of these networks, providing financial resources. The evidence offered in this thesis also suggests that a large part of new philanthropic organizations perform as boundary actors, and that there need to be boundary actors in different groups and levels in a network, because of their power to link organizations and enable

“smaller” nodes to access funds and the policy context. For example, Compagnia di Sanpaolo (Intesa Sanpaolo banking foundation) was a fundamental boundary actor. It functioned as a boundary actor because of its position within the Italian policy network focused on social investment by providing funds to different organizations, such as the foundation Nesta Italia, the association EuFemia and the NGO Teach for Italy.

There were a variety of boundary positions at different points in the social investment networks analyzed with varying roles which promoted “minor” actors participation in these networks, such as moving between fields through engagement in multiple positions, accumulating a significant volume of social capital, acting as “changemakers”, taking part to an interconnected and powerful corporate elite, playing senior management roles in leading financial institutions.

Therefore, boundary actors existed in various levels of the education policy networks focused on social investment and came from diverse social spheres. Moreover, their commonalities were characteristics which enabled them to bridge different organizations and facilitate social investment processes such as the provision of funds. This points to the necessity of understanding “smaller” new philanthropic organizations in social investment networks in education in terms of their features and roles, since these may contribute significantly to education governance processes.

Furthermore, in the education policy networks presented in this thesis, banking foundations have usually played the role of boundary actors, for example when disseminating social investment strategies. The Compagnia di Sanpaolo (foundation of the Intesa Sanpaolo bank), Turin saving bank foundation (Fondazione CRT, Fondazione Cassa di Risparmio di Torino), Cuneo saving bank foundation (Fondazione CRC, Fondazione Cassa di Risparmio di Cuneo), UniCredit Foundation (Fondazione UniCcredit), Florence saving bank foundation (Fondazione CR Firenze, Fondazione cassa di risparmio di Firenze) have that position in the networks. Finally, through the collaboration among banking foundations and the educational system, “minor” new philanthropic organizations are connected to a number of schools, national and European public entities and other private new philanthropic organizations.

## **8.2 Considerations on methodology**

After presenting the theoretical inquiry carried out, in this paragraph I introduce some considerations on the empirical analysis that form the focus of the thesis, in order to provide a summary of the main methodological actions followed to collect and analyze data on social investment strategies in European education.

In this paragraph, I also explain as the research was limited by methodological challenges. Furthermore, I recapitulate how the study attempted to investigate the area of social investment in education using a method based on visualizations to provide clarifications on the networks of relationships in which new philanthropic actors are involved, and argue that further empirical research based on ethnographic



approaches can provide a more extensive understanding of such strategies and their impacts on education governance.

### **8.2.1 A methodological inquiry involved in visualizations**

With the aim of following the network ethnography assessments defined in the previous paragraph, a methodology was arranged in order to explore what was addressed at the beginning of this thesis. In the following two empirical chapters, the methodology will introduce an interview method focused on how social investment strategies are implemented.

The network ethnography was based on comprehensive interviews with employees of new philanthropic organizations. As explained in Chapter 2, the comprehensive approach is based on the conviction that the interviewees are active producers of the social. Therefore, in the comprehensive interview the question grid is a flexible representation and a guide for the interviewer and can be used to make people talk about an issue and obtain a richer conversation dynamic than just answering questions. The question grid is also structured in such a way as to produce a positive sentiment in the interviewee (de Singly, 1992), who can be more or less “involved” in the interview depending on the level of confidence towards the interviewer.

The interview method was developed in order to be able to come to network visualizations. The network visualizations were, in turn, developed in relation to the network ethnography approach to figures that was introduced in Chapter 2 about methodology and I will examine the related results in the next section. Hence, what is typical about social investment strategies can emerge (for example specific types of investments, different organizations that stand central, different kinds of enacted spaces for cooperation and influence) through exposing graphs. This implies that the suitable diagrams have to be showed, and that these have to be combined with a proper text, for example interview extracts.

However, the network visualizations constructed do not have any motivation to make a predominant assessment on social investment strategies in education as they are established nowadays. Definitely, the networks show how relationships play a prominent role in the effectuation of concrete practices. The concrete implementation of network visualizations is provided in the next section.

### **8.2.2 An empirical investigation into social investment strategies**

As specified before, the purpose of the empirical investigation was not to come to an extensive overview of the contents of social investment strategies, but to provide an overview on European social investment networks in education and their relationships. Moreover, I started with an in-depth study of social investment networks classified by the type of actors involved.

It soon became clear that not only is there an enormous amount of actors necessary for social investment dynamics in education to be implemented, but similarly that these actors are distributed into small networks that have different functioning dynamics and that some of these networks are associated with each other through boundary actors or geographical and thematic networks of actors.

Additionally, in the next two empirical chapters I present graphs displaying Italian new philanthropic networks focused on social investment, each time surrounding extracts of the interviews with the employees of these organizations. Each graph visualizes a typical network form, and equally represents distinctive components of social investment strategies in education. Overall, what the two empirical chapters allow to see is, first, what is typical about the composition of social investment and, second, how social investment networks function in practice. These analyses also enable to map different social investment strategies in view of the relations that are established between different organizations (central, boundary and peripheral ones). In other words, in these investigations I will show in detail what the different relationships do between the new philanthropic actors, which have allowed me to come to additional understanding of what social investment consists of.

### **8.2.3 Methodological challenges**

This thesis attempted to research the social investment strategies in European education using a network governance framework and a methodology based on one case study for each of the two objectives of the research. However, investigation on social investment strategies adopted by new philanthropic organizations has been limited by methodological challenges.

Collecting and analyzing data on network and investment processes and connecting them to impacts on education was challenging, because social investment processes were always not linear. The interviews on social investment processes were also limited by the difficulty of identifying concrete impacts, in the sense that the interviewees did not explain in detail the changes in the educational systems embodied in their projects.

Therefore, the quantity of data collected from case studies is a weakness of this approach and this is a limitation about how applicable the findings are to education policy networks more widely. Hence, as previously explained, the global health crisis that began in 2020 has slowed down the data collection, because of the remote working by employees of new philanthropic organizations and travel restrictions that prevented me from traveling to their headquarters.

Moreover, implications for methodologies in future research on social investment are that ethnographic studies are useful for collecting data on complex processes that occur in policy. These methods can perhaps be useful in investigating the impacts produced by policy developments in social and financial contexts and require a detailed study, that could be drawn on research on actors and their relationships to be analyzed in other policy contexts.

Additionally, ethnographic methods employed with policy network frameworks could be used more extensively in evaluation to capture processes in order to explain impacts on social investment in education and changes in the educational system. Finally, the disadvantage of this method is its time-consuming nature.

### **8.3 Implications of social investment in education**

This paragraph outlines three implications of social investment in education within new philanthropic networks, based on the findings presented in the next two chapters. In the paragraph, I also explain how these implications aim to make sense of the empirical investigation, although some issues remain to be addressed and debated further.

The first implication illustrates the evolution of new philanthropic priorities in the European education governance, taking into account their main lines of actions, and the challenges for which these organizations work and connect to each other. The second implication shows how venture capital have gained relevance in European education networks focused on social investment. Finally, the third implication clarifies the shared definition of education priorities between new philanthropic actors and policy-makers in education. In this connection, the thesis reveals the complex interrelation and mutual constitution of priorities between private actors and policy-makers in education.

#### **8.3.1 First implication: the development of new philanthropic organizations' priorities in the European education governance**

In the last decades, new philanthropic organizations began to be more integrated in the European education governance thanks to the increasing and significant role that philanthropic activity has played within the processes of public sector modernization. In this context, philanthropy is one contributing factor to the processes and discourses of changing educational governance, that has served to validate and circulate new practices in the infrastructure of public service delivery. Therefore, philanthropy has played a particularly important symbolic and strategic role, providing an acceptable alternative to the state in terms of its moral legitimacy (Ball & Juneamann, 2012). In this scenario, businesses are regular contributors to conversations about global education and have contributed to oftentimes-normative debates on major issues (Menashy et al., 2019).

The theoretical framework of the thesis, focused on education policy networks, explains these processes in education, by which the establishment of a “new governance” is introducing new players and agents, a set of new languages and practices, new interests and opportunities and new “authorities” into public sector education (Ball & Junemann, 2012). Such processes have also established new goals as a relevant priority due to different factors.

As outlined in the previous paragraph, a fundamental goal of the new philanthropic organizations in education governance is establishing advantageous partnerships with other private actors. This objective has been introduced by some of the respondents, such as the interviewees of the organizations: Fondazione Cariplo, Fondazione Fits, Passo dopo Passo...Insieme and Amici di Peter Pan. They outlined how conducting a due diligence work on partnerships proposed by others, evaluating the criteria for the partnership search required in the calls for grants, selecting credible collaborators and sharing the organization's mission with partners are practices facilitating networking, sharing of knowledge and interlinking with other valuable networks.

Furthermore, a crucial activity carried out by new philanthropic organizations is project design, as specified by the head of applied research and promotion of the human capital of the Fondazione Cariplo, who underlines that, before implementing a project, a component of data collection, treatment and research are examined thanks to the support of academic institutions, such as the Polytechnic and Catholic University of Milan. A component of evaluation of impact is also considered in order to identify projects that are particularly valuable from a business model point of view.

Another essential objective is collecting funds to carry out educational initiatives through the systematic and structured activity of fundraising, whose importance has increased in the latest years. As stated by two of the respondents, respectively the president of the association Amici di Peter Pan and the vice president and coordinator of the educational activities of the voluntary organization Passo dopo Passo...Insieme, the strategic fundraising plan is a central document which monitors the achievement of the fundraising annual plan. Finally, the presence of a specialised consultant is needed because the fundraising work has to be done in a systematic way.

### **8.3.2 Second implication: the growing relevance of venture capital in the European education governance**

According to McGoey, philanthrocapitalism is “the tendency for a new breed of donors to conflate business aims with charitable endeavors, making philanthropy more cost-effective, impact-oriented, and financially profitable” (McGoey, 2012, p. 185). Hence, the new trend of philanthrocapitalism has enabled a growth in private authority to drive the trajectory of global education funding policies and programs (Menashy et al., 2019).

In this scenario, new philanthropic organizations want to “give back” what they generated in the form of profit from their activities. “However, they want to use their donations in a businesslike way as “investments” with good returns. Indeed, new policy initiatives [...] attract financial ‘investment’ from both business and business philanthropy - venture capital and venture philanthropists - and are producing new sorts of organisations and organisational relationships that blur traditional distinctions between public, philanthropic and for-profit sectors. There are then, perhaps, different sorts of money involved here.” (Ball, 2012b, p. 25).

Furthermore, some of the elements of philanthropic engagement in European education governance can be highlighted by looking at venture capital investments in education implemented by the case study Fondazione Cariplo and presented in Chapter 9. The first element of its philanthropic engagement is an analysis of the opportunities, understood as an examination of the needs emerged in the territory, which is carried out through investigations for sight or studies. The second is a feasibility plan, based on an opportunity of investment having a relapse on the reference area and being implemented in a specific programme. The third element consists of listening to research institutes, policy institutions and think tanks so to facilitate the analysis of financial tendencies and scenarios. The fourth element is defining intervention models necessary to achieve quantitative results in the promotion of policies of intervention to be implemented in agreement with institutions. The last element is the consideration of technological instrumentation provided to schools as a catalyst for further businesses, able to contextualize initiatives inside higher projects.

Finally, as will be illustrated in the next chapter, through the implementation of the benefit company Cariplo Factory, which aims to combine profit objectives with positive impact in the community, the Fondazione Cariplo is able to connect to a wide network involving venture capital investors, hi-tech companies and social enterprises. The “innovation hub” Cariplo Factory also provides capital investments, entrepreneurial support programs and open innovation projects. Among the funding partners of the benefit company Cariplo Factory there are: hi-tech companies, banks and venture capital corporations.

### **8.3.3 Third implication: the shared definition of education priorities between new philanthropic actors and policy-makers in education**

The roles of businesses in policy design have been the target of a wider debate concerning the legitimacy and qualifications of private actors to lead and oftentimes dictate social policy (Menashy et al., 2019). In this context, policy networks constitute discourse communities, in which philanthropies and corporate philanthropies are integrated and are being invited to work with government or agencies or in partnerships of various kinds in attempts to solve intractable and “wicked” social and educational problems (Ball & Junemann, 2012). Hence, while non-state actors have long played significant roles in education, the direct participation of the for-profit business sector in global education policy is a more recent development (Menashy et al., 2019).

This research demonstrates the existence of a dialectical relationship and mutual definition of priorities between new philanthropic organizations and policy-makers in education. The dialectical relationship can be shown in some key examples, which will be presented in detail in the next two chapters. Furthermore, as stated by the head of international relations of the Fondazione Cariplo, the engagement with government in educational programmes consists in managing joint grants with the municipality and the region, which have financial resources available for particular issues, such as those related to education.

The president of the NGO Teach for Italy therefore highlights that structuring partnerships with the Ministry of Education at the national and local level, through regional and provincial school offices, allows access to the highest levels of policy activity.

Another example concerning the dialectical relationship between new philanthropic organizations and policy-makers to define education priorities is meeting partners with whom to create social demand by virtue of trust and shared values. This action is underlined by the youth years programme manager of the NGO Ashoka Italia, who states that the organization also identifies classes of partners to work with, on the basis of common values.

All these examples illustrate the complexities of the mutual definition of priorities between new philanthropic organizations and policy-makers in education, underlining how key actors “join up these social, political and economic fields - as carriers of the discourse and practice of neoliberalism.” (Ball, 2012b, p. 26).

#### **8.3.4 The redefinition of the research model**

For analytical purposes, identifying lines of inquiry focused on, respectively, the link between Europeanization and new philanthropic networks in terms of European digital education networks and between European policies funding social inclusion initiatives in education and the recommendations implemented in national contexts has been productive to make sense of how new philanthropic organizations are operating in networks of governance in Italian education.

Each line of inquiry of the thesis is also organized in a specific hypothesis. Regarding the first line of inquiry, I analyzed the possibility for new philanthropic organizations to promote social investment in European education through the digital education networks in which they are involved. As for the second line of exploration, I investigated the opportunity for new philanthropic organizations to give voice to a wide range of advocacy groups for social inclusion in education by mobilizing their resources.

Moreover, the social investment strategies of new philanthropic organizations in European education analyzed through the two hypotheses are deeply interlinked. This means that there are no separations between the purposes involved in the strategies for the promotion of social investment in digital education and the advocacy strategies carried out by philanthropists to guarantee social inclusion at different levels.

Here, I reflect on the analysis presented in the following empirical chapters, aiming to reconstruct the links between the social investment strategies traced and the theoretical perspective focused on policy networks. Therefore, I return to the initial frame of analysis, which is re-presented below in a revisited version.

In the following two empirical chapters, an analysis of the different forms of social investment in European education will also be provided. Hence, each section of the chapters will introduce some depth

to the empirical analysis, which is represented with the horizontal boxes in the model of the research revisited (Figure 8.1). I will now summarize some analytical points.

What has emerged from the empirical investigation is the central value of *profit*. This means that the new philanthropists who invest in education aim at a return on their investments, as is the case with for-profit companies. Moreover, three key and interconnected discourses appeared recurrently in the interviews and in the educational programmes sponsored by new philanthropists. One articulates a concern for issues related to boundary actors, another pertains to geographic and thematic networks and the third relates to venture capital investments. These discourses can be understood to have a relationship and constitute a discursive ensemble (Ball & Junemann, 2012) that articulates a particular vision of social investment strategies in European education.

In a simple sense, a way of getting into the complexity of the mobilization of impact through network relations can be to focus on the role of nodal actors. As seen in the networks displayed across the following two empirical chapters, not all nodes can be considered to have the same influence. Moreover, the actors of interest in this thesis are those who play brokerage roles and appear repeatedly in a variety of roles and relationships, moving between fields. Some of the interviewees could serve as examples. Indeed, the head of international relations of Fondazione Cariplo underlines:

“The criterion is that companies with policies of social responsibility have demonstrated for many years to take in serious consideration some issues that are similar to ours. So, it has often happened that, for example, with Intesa Sanpaolo [Italian bank], Fondazione Fiera [foundation of the main Italian trade fair and congress operator], or even with corporations that have been working for years on issues like food poverty, we aggregate financial resources on common projects. And there is the due diligence, which is very strong, because it's clear that to work on a project with a company we must have guarantees about a series of things, aspects as you can imagine related to the companies we establish partnerships with.” (Interview, Fondazione Cariplo, 2020).

As explained by the respondent, the bank Intesa Sanpaolo and the Fondazione Fiera operate in the social investment networks of Italian education by providing financial resources for common projects and due diligence work. Furthermore, some groups of new philanthropic organizations in the social investment networks displayed in the following two chapters, are particularly “networked”, meaning they have accumulated a large volume of capital related to the social fields (Ball & Junemann, 2012, p. 94), such as relational, cultural and symbolic capital. These groups constitute geographic and thematic communities that are disconnected from the center of the networks. Some examples are constituted by the voluntary organization Passo dopo Passo...Insieme, that provides educational activities in Catholic churches and the association Amici di Peter Pan, that works exclusively with disadvantaged students of the city and province of Naples and is quite separated from the central nodes of the social investment networks in education having among its financial supporters mainly organizations based in the same area.

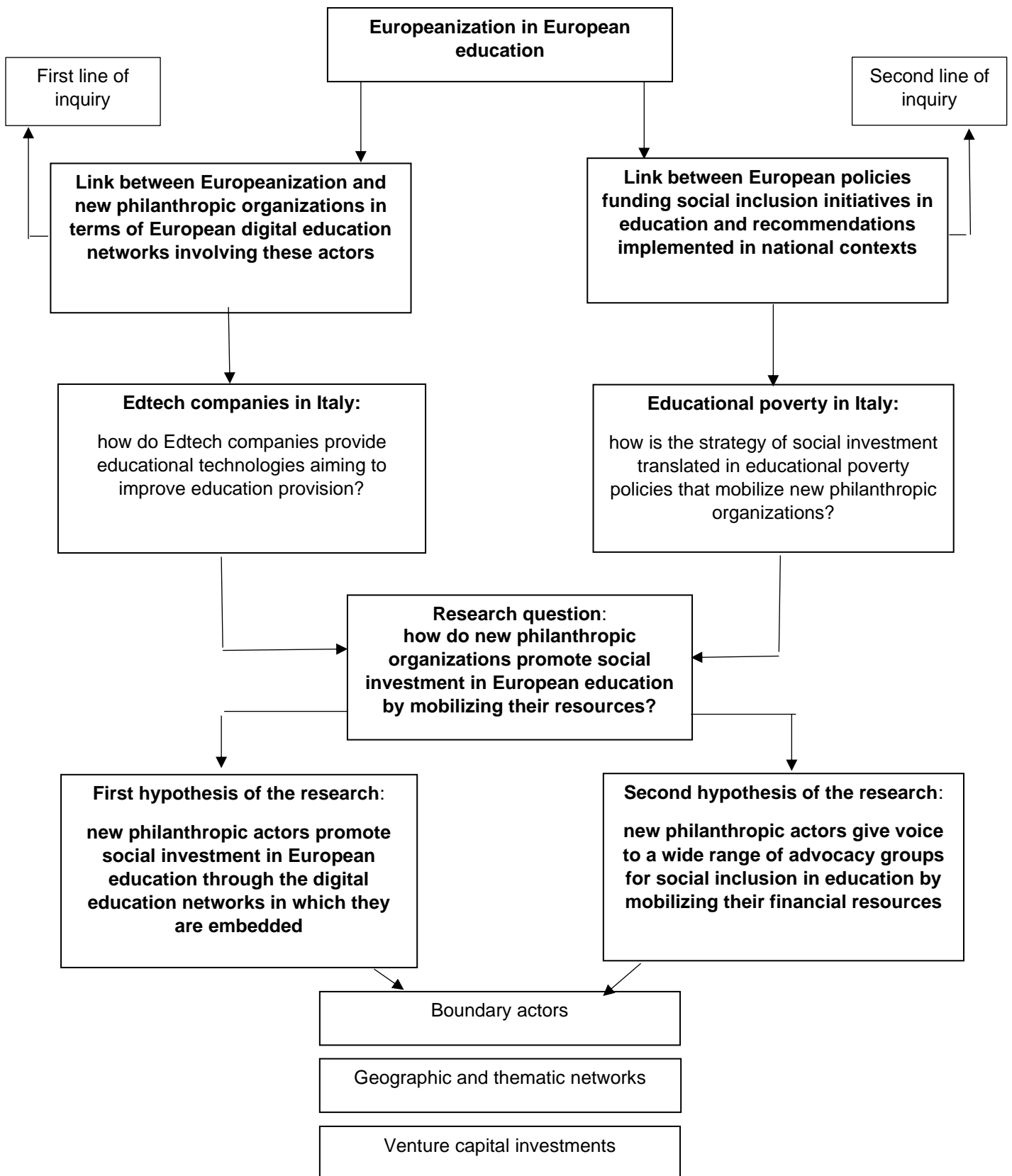
Moreover, social investment initiatives in education are conduits for enterprise discourse. They highlight both the role of businesses in developing and supporting positive change in the educational systems,

and the complex flow of funding through networks created by philanthropists. The new philanthropic organizations also give some indications of the complex relations between moral and business interests in the forming of particular kinds of financially “responsible” workers through venture capital investments in education, in fact, as stated by the head of applied research and promotion of the human capital of Fondazione Cariplo:

“[...] all that potential inventions [...] are screened and analyzed to verify if they can effectively have a potential of relapse in the productive world, receive a certain type of financing so that this invention, industrial prototype can become a real product.” (Interview, Fondazione Cariplo, 2019).



Figure 8.1 Research model revisited



## **8.4 Limitations and future research directions**

In the following sections, I present an introduction to the limitations of studying social investment in European education encountered in this investigation. In the paragraph, I also underline what the elaborations concerning the subject of the study were and provide possible further contributions for the research field.

The sections therefore offer a reflection on what can be defined as social investment and what are the strategies that concern these activities implemented by the new philanthropic actors who invest their financial resources in European educational systems.

### **8.4.1 Limitations**

The display of policy network provided in the following two empirical chapters is intended to introduce an account of social investment strategies in education. Based on the backgrounds of different strategies, I first present the different roles that the new philanthropic organizations perform in social investment dynamics and relate these roles to the strategies that they adopt to promote social investment in education.

In this chapter, I do not have the time and space to elaborate all the strategies related to European social investments in education. Rather, I will limit the argument to what could be identified as a social investment practice. In this regard, something can be designated as a social investment practice to the extent that related funding initiatives are provided to pursue social impact, involve private and public organizations and aim to produce a financial return on investment.

In this sense, given the central interest of the thesis in investigating social investment strategies in European education, network visualizations constitute a first stage of representation of these strategies: they were organized to clarify practices composing initiatives of social investment.

In the analysis provided in the following two chapters, network ethnography will also be able to make these social investment initiatives explicit. Finally, reconsidering the analysis on social investment in education presented in this study, the empirical investigation I introduce in the next sections might constitute an overview of such social investment activities in education. The activities that will be presented there, i.e. the financial initiatives that took place between private and public actors, is established all have something in common: these are all activities that created opportunities of educational change and, at the same time, financial return on the initial investments provided by the new philanthropic organizations.

#### **8.4.2 Contribution for future research**

In this section, the relevance of this dissertation is introduced in respect to suggestions for practitioners in social investment in education. The study, in fact, will show how social investment networks in education constitute advantageous structures for the new philanthropic organizations within limitations due to their economic and political contexts.

Within the participation to the education governance networks, there have been few studies on what social investment strategies produce in terms of impacts in the field of education. In the next two chapters, this thesis will explore network aspects of social investment dynamics with respect to the processes and impacts of social investment in two new philanthropic organizations, which constitute the case studies of the research. Several indications for future research can therefore be provided. Firstly, since this study used a case study methodology for each objective there is an obvious opportunity for other case studies to explore whether these sorts of social investment processes operate in other education policy networks.

Secondly, investigating the different types of relationships that new philanthropic organizations establish with public authorities may identify specific features of powerful new philanthropic organizations providing a greater impact on education services compared to others.

Thirdly, how the employees of the new philanthropic organizations network with public entities could be explored, in order to assess the extent to which employees with different roles contribute to decision-making processes and how they access these networks. Furthermore, the question of the relevance of this research is a question that urges to be applicatory to the practical field. This relevance is about potential involvement of the findings introduced in the next two empirical chapters and the implications provided in the previous paragraph.

#### **8.5 Conclusion**

This chapter discussed the theoretical implications of the findings of the study and the relevance of this dissertation as a possible contribution for practitioners in the field of social investment in education. It also highlighted how, as regards the empirical investigation, a network ethnography underlined the role of boundary actors, sometimes operating in peripheral spaces to enable “minor” new philanthropic organizations to obtain funds to implement their projects and produce a positive impact on educational systems.

Furthermore, the chapter explained as this thesis initiated a discussion on social investment dynamics in education governance. The dynamics of social investment processes in this context have not been well understood, particularly in terms of what impact they produce on the educational system. Therefore, I explained how there are various ways in which social investment dynamics in European education governance could be further investigated in future research and how this study has represented an involvement for forthcoming research on social investment.

## Chapter 9

### **Social investment strategies in digital education networks**

This chapter introduces the findings concerning the first objective of the research. Furthermore, as emerged from the literature review on new philanthropic actors in European education, nowadays Ed-Tech companies exercise a centrale role in implementing social investment strategies. One of the two objectives of the study was therefore to investigate the European digital education networks in which new philanthropic organizations are involved with public and private stakeholders. Hence, the chapter seeks to answer to the hypothesis related to the first objective of the research: new philanthropic organizations promote social investment in European education through the digital education networks in which they are involved.

In order to investigate the first objective of the thesis and confirm or refuse the related hypothesis, I present a data analysis based on interviews and focus on the exploration of visual accounts displayed through the graph manipulation software Gephi. Thus, different maps concerning new philanthropic organizations focused on digital education and their connections with public and private actors are displayed in respect to topological dimensions of visual analysis.

The chapter begins with a description of the data collection, visualization and analysis and goes on with discussing some of the social investment strategies adopted by new philanthropic organizations investing in digital education in Italy. Furthermore, in the light of the findings provided, it investigates the first hypothesis of the thesis and moves on to consider how the analysis may contribute to future research directions. Then, it presents different graphs concerning new philanthropic organizations involved in digital education networks. The fourth paragraph provides an examination of the Italian case study Fondazione Cariplo in relation to its collaborations and synergies with venture capital investors, hi-tech companies, social enterprises, universities, research centres, schools and training institutions.

#### **9.1 Modes of inquiry**

The paragraph examines the methods of the empirical analysis conducted to investigate digital education networks and social investment strategies adopted by the new philanthropic organizations within these networks. The description of the data collection modes is accompanied by tables concerning the dimensions of analysis. Furthermore, the section on data visualization introduces some specifics about the graph manipulation tool and the force-based algorithm called Force-Atlas used to display the networks in the different forms. In fact, the maps shown through the chapter were constructed on the basis of the attraction between connected nodes and the repulsion of unconnected nodes

calculated through the force-based algorithm. Finally, the last section presents the clusters that have guided the data analysis: distribution, type of organization, social investment strategy adopted by new philanthropic organizations and investment strategy implemented by these actors in digital education networks.

### **9.1.1 Data collection**

In order to analyze the European digital education networks in which new philanthropic organizations are involved with public and private stakeholders and the social investment strategies they adopt inside these networks, a methodological design was created to identify different financial and social relationships between the various actors. The design consists of a detailed analysis of social investment strategies in digital education, that will be reported in the following paragraphs through an explanation that is both visual and written. To this end, 32 people from 21 organizations of various types were interviewed about the relationships of the organization they belong to with public and private stakeholders and the social investment strategies implemented by these organizations.

Moreover, members of different types of new philanthropic organizations from different legal forms and various fields of activities have been interviewed. The interviews were set with senior figures in the education service industry and preceded by extensive internet searches focused on the education policy involvements of these actors: “The purpose of the interviews was to understand the history and work of this businesses, the constitution and history of their staffs and their engagement in and with current education policy processes.” (Ball, 2008, p. 2).

The transcripts of the interviews with new philanthropists involved in digital education were analyzed along the research question and hypothesis of the study. Moreover, quotations of the interviews were used as accompaniments to the data analysis. In most cases I have been able to record and transcribe the interviews, except for four interviews in presence. After transcribing interviews verbatim, the transcripts were used to represent interactions performed by the various actors.

As already noted in the first part of the thesis, interviews were conducted in two steps. In the first exploratory phase, European new philanthropic organizations were identified on websites. The analysis began by exploring websites and keeping tracks of links to additional organizations they contained, in order to discover other relevant actors and highlight connections between them. Subsequently, each organization has been categorized according to the dimension at which it operates and the type of actor it represents. The European new philanthropic organizations analyzed in the first exploratory phase are introduced in Table 9.1.

**Table 9.1 Interviews with employees of European new philanthropic organizations**

Interviewees	Organization	Type of organization	Type of interview
1	Yerun Group	Network	In presence, Brussels, February 2018
1	Think Young	Think tank	Phone interview, August 2018
1	European Digital Learning Network	Association	Phone interview, March 2019
1	All Digital Association	Association	Video interview, August 2019
1	Learning for Well-being	Foundation	Video interview, August 2019
1	Aalto University	Academic organization	Phone interview, August 2020

After the first exploratory stage, I concentrated on Italian actors (see Chapter 2 about methodology for a detailed explanation of the Italian fieldwork). As for European organizations, interviews were scheduled after an actor was identified as “central” in terms of nodal density (visual interconnectedness of actors) within the network of new philanthropy in digital education, starting with online searches and building network graphs, that accompanied the different phases of the study. Referring to the information available on the websites, I distinguished foundations, associations, cooperatives, social enterprises, NGOs, voluntary organizations and think tanks. In the following table, I present the Italian new philanthropic organizations analyzed in the second phase of the data collection.

**Table 9.2 Interviews with employees of Italian new philanthropic organizations**

Interviewees	Organization	Type of organization	Type of interview
2	Fondazione Arnaldo Pomodoro	Foundation	In presence, Milan, July 2019
3	Fondazione Cariplo	Foundation	Phone interviews, July 2019 and July 2020
1	Nesta Italia	Foundation	Video interview, August 2019
1	Ashoka Italia	NGO	Phone interview, August 2020
2	Assifero	Association	Phone interview, August 2020
2	Fondazione Pirelli	Foundation	Written interview, August 2020
1	Amici di Peter Pan	Association	Phone interview, February 2021
1	Fondazione Fits	Foundation	Phone interview, February 2021
1	EuFemia	Association	Phone interview, February 2021
4	Passo Dopo Passo...Insieme	Volunteer organization	Phone interviews (February-March 2021) and one interview in presence, Milan, March 2022
1	Alleanza per l'Infanzia	Think tank	Phone interview, March 2021
4	Big Picture Learning	Social cooperative	One phone interview, April 2021, and one video group interview, March 2022
1	La Fabbrica dei Suoni	Social cooperative	Video interview, April 2021
1	Con i Bambini	Social enterprise	Phone interview, April 2021
1	Teach for Italy	NGO	Phone interview, February 2021

In order to have a complete view of the functioning of new philanthropic organizations and their relationships, I interviewed employees who occupy different roles in the organizations as presented in the table 9.3.

**Table 9.3 Classification of interviewees by role**

Interviewees	Role
4	Governance board member
7	President
7	Head of department
12	Manager
2	Staff employee

Finally, the data analysis process resulted in different social investment network maps, each map having its own characteristics. As explained before, I analyzed these maps according to three topological dimensions, introduced in the table below.

**Table 9.4 Topological dimensions of visual analysis**

Dimensions	Characteristics	Visual representation
<b>Centers</b>	<p>Authorities of the networks having most of the connections and consequently being highly visible</p> <p>Hub-actors around specific projects</p> <p>Actors guaranteeing the interconnection of the network</p>	<p>Highly connecting actors occupying the centers of the network</p> <p>Organizations surrounded by more or less interconnected actors</p>
<b>Boundaries</b>	<p>Nodes connecting different networks</p> <p>Organizations which are not the most prevalent in the network</p> <p>Actors gathering different types of activities</p>	<p>Nodes gathering actors together</p> <p>Actors associating different "minor" clusters</p>
<b>Margins</b>	<p>Actors coming to stand more on their own</p> <p>Nodes not linking actors together</p> <p>Organizations defined by a geographic or thematic diversity</p>	<p>Organizations positioned at the margins of the graphs</p> <p>Actors located in small isolated clusters</p>

### **9.1.2 Data visualization**

The visualization phase began with the analysis of each interview transcript to identify different relationships between new philanthropic actors focused on digital education. Then, the resulting networks were visualized through the Gephi graph manipulation tool.

Each graph displayed in this chapter consists of nodes that connect actors and edges that visualize interactions between these actors. The form of the different graphs was obtained by a force-based algorithm called Force Atlas, able to build a network of nodes and edges based on the attraction between connected nodes and the repulsion of unconnected nodes. Moreover, as argued by Severo and Venturini (2015) once the algorithm is launched it changes the disposition of nodes until reaching the best balance of forces. Such equilibrium guarantees that if two nodes are close in the specific graph, they are connected directly or indirectly to the same set of nodes.

I also focused on the visual aspects of the graphs, by manipulating two parameters: the size of the nodes, calculated as the number of links with other nodes (degree visualization), was used to rank the various actors by their visibility in the network (the size of each node is proportional to the number of connections with other nodes); the colour of the nodes was used to represent their category. Indeed, new philanthropic organizations have been clustered according to their type: foundation, association, cooperative, social enterprise, NGO, voluntary organization, think tank, Italian public authority, bank, multinational, academic organization, etc. Thus, the size and colour codes express respectively the connectivity and the categorization of the nodes. Consequently, the presence of many nodes of the same colour in the same section of the graph is meaningful, in the sense that it allows to know if nodes cluster by category and to infer the position of different categories as central or marginal.

### **9.1.3 Data analysis**

The analysis identified a network of 140 nodes and a total of 154 connections. In presenting data analysis, an introduction to Italian digital education networks is provided in the following paragraph, accompanied by a presentation of the nodes occupying its centre and marginal areas. A particular attention is addressed to the organizations connected to the central core, composed of the most visible nodes. This central group, collecting organizations surrounded by more or less interconnected actors, will be analyzed more in detail, with some comparisons between the different nodes that constitute it. Some “minor” networks will also be identified in respect to the dimension and type of the organizations that compose them. Finally, a classification of thematic clusters will be introduced, related to the research objectives and hypothesis.

Summarizing, the data analysis will be developed according to the following clusters:



**Table 9.5 Data analysis clusters**

<b>Clusters</b>	<b>Characteristics</b>	<b>Visualization</b>
<b>Distribution</b>	Position of the actors in relation to each other in the network	Interconnected nodes positioned close to each other and depicted in the same colour (fig. 1.1)
<b>Type of organization</b>	Category of actors (foundations, associations, cooperatives, social enterprises, NGOs, voluntary organizations, think tanks, etc.)	Actors of the same type displayed in the same colour (fig. 1.2)
<b>Social investment strategy</b>	Actors aiming to find solutions to social needs, on the base of the evaluation of an interesting business model	Nodes connected directly or through boundary actors (fig. 1.3)
<b>Investment strategy in digital education</b>	Organizations focused on projects that aim mainly to solve the digital skills gap and improve teaching and learning methods	Actors linked by their focus on implementing educational technologies or developing projects together (fig. 1.4)

## **9.2 Discussion on social investment strategies in digital education networks**

In this paragraph, I combine the results of the empirical study on digital education networks with some literature regarding the investment strategies of new philanthropic organizations, following the connections displayed.

Therefore, I provide a discussion on the findings regarding social investment strategies in digital education networks to investigate the first objective of this study, which is to explore the European digital education networks in which new philanthropic organizations are involved with public and private stakeholders, and confirm or refute the first hypothesis of the research on the possibility for new philanthropic actors to promote social investment through the digital education networks in which they are embedded.

### **9.2.1 Network dynamics of Italian new philanthropic organizations**

In order to verify the first hypothesis of the research, some nodes and their connections within the Italian networks on digital education were analyzed thanks to the information provided by the employees of

new philanthropic organizations in semi-structured interviews. Moreover, in the chapter I show through the visualizations of graphs the interactions between these nodes in different digital education networks. In an attempt to explore these policy networks and examine how they work, what emerged is that the dynamics of networks, that is the “networking”, are made of processes and relationships, rather than constituting a fixed structure (Ball & Junemann, 2012).

As stated by Mackenzie and Lucio (2015), actors operate on the basis of a diversity of linkages, that can be formal and contractual relations. These formal linkages can include “state license”, contracts, collective agreements, forms of partnerships and collaborations between social actors. Nevertheless, such linkages may also be represented by “complex mechanisms of tolerance and accommodation that may not be formally articulated” (Mackenzie & Lucio, 2015, p. 19). In this context, there are various possibilities of influence within policy available for these actors, especially to corporate actors engaged in philanthropic educational programmes, that can involve interventions into practice or problems or supplementary service provision. Therefore, philanthropies are now directly engaged with government in educational programmes in various ways, including partnership, contracting and joint and matched funding (Ball & Junemann, 2012). This partnership with government in educational programmes has been confirmed by the head of international relations of the Fondazione Cariplo, who explains:

“We have even done joint grants with the municipality and the region. The municipality and the region have resources themselves, that are available for particular issues [...] At the national level, our principal partners are the public bodies of the territory in which we operate. Because we work mainly in the Lombardy region, we have, among our privileged partners, the public bodies of this territory. So, the region, the principal city offices, and so on” (Interview, Fondazione Cariplo, 2020).

In addition, “by virtue of their positions and roles in business and their civic responsibilities, these actors have a unique and privileged access to the highest levels of policy activity and are able to become participants in policy conversations related to fields of interest far removed from their core expertise.” (Ball & Junemann, 2012, p. 91). The relevance of *partnerships with national public authorities* at high level is mentioned by the president of Teach for Italy, who specifies:

“We have a structured partnership with the Ministry of Education, at national and regional level. So, we work with the USR [Regional School Office, Ufficio Scolastico Regionale] and with the provincial school offices of the ministry.” (Interview, Teach for Italy, 2021).

As we can see from the extracts from the interviews, the behaviour of the actors studied is closely embedded in networks of personal relations (Granovetter, 1985). In these networks, new philanthropic actors work in part by virtue of trust and shared values (Ball, 2007), in order “to facilitate partnerships, new projects and investment agendas” (Ball & Olmedo, 2011, p. 86). In fact, as stated by the youth years programme manager of the NGO Ashoka Italia:

“It happens very often that the partners contact Ashoka or that we meet at common panels and work together. As all major companies, we meet, we do networking and we work together. One thing that I can tell which is more interesting and specific of Ashoka is that

we have identified classes of partners we would like to work with. They are partners capable to generate social demand. Creating social demand in respect to what we believe.” (Interview, Ashoka Italia, 2020).

Moreover, the recent centrality of education as a space for investment and profit-making within financial markets is apparent in the emergence of specialized “eduspace” players, such as non-profit investment ventures, financial advisors and funds (Santori et al. 2016). As explained by the head of applied research and promotion of the human capital of Fondazione Fits (Foundation for third sector innovation, Fondazione per l’innovazione del terzo settore):

“Another activity we do is to go and identify, if necessary, investment funds or financial resources, which the project needs. So, in this case we are not a grantmaking foundation. We are a business foundation.” (Interview, Fondazione Fits, 2021).

In the field of non-profit investment ventures, an example of *venture capital model* based on strategic funding, risk taking and “scaling-up” of successful prototypes, is provided by the head of applied research and promotion of the human capital at Fondazione Cariplo:

“It’s the turn of policy-makers and public decision-makers to say that this the model which has been experimented by private funds has demonstrated to bring benefits. So, we keep this model [...] Sometimes our interlocutor is the public decision-making at the national level. Sometimes it makes sense to share with the European policy-makers what has been done in Italy as something excellent.” (Interview, Fondazione Cariplo, 2019).

This final affirmation demonstrates how new philanthropic organizations seek to “sell” policy ideas to government using outcomes evidences to make the case for wider take-up and funding. Hence, it is illustrative of the sociality of philanthropic networks, the embeddedness of the participants within the set of business relations and that underpin the policy and philanthropic relationships. Finally, new philanthropy is described, through the declarations of the respondents, as being a “highly social world” built on dense networks of relationships between public and private organizations (Ball & Junemann, 2012, p. 83). The dynamics of social investment in the governance of Italian digital education highlighted by the respondents are illustrated in Table 9.6.

**Table 9.6 Network dynamics of social investment in Italian digital education governance**

Network dynamics of social investment	Types of activities
<b>Engagement with governments in educational programmes</b>	Contracting for grants with the regions, municipalities and city offices
<b>Access to the highest levels of policy activity</b>	Structuring partnerships with the Ministry of Education at the national and local level (regional and provincial school offices)
<b>Work by virtue of trust and shared values</b>	Doing networking and meeting partners with whom to create social demand in respect to the vision of the organization
<b>Acting as “eduspace” players</b>	Identifying investment funds or financial resources, which the project needs
<b>Venture capital investment, strategic funding, risk taking and “scaling-up” of successful prototypes</b>	Keeping an experimental and successful model based on private funds and sharing it at the national and European level

**9.2.2 The roles of boundary actors in Italian digital education networks**

As shown in the graphs throughout the chapter, “small” clusters of relationships compose the network of new philanthropy in Italian digital education governance. A way of getting into the complexity of these network relations can be the focus on the role of nodal actors, constituted by organizations that appear in a variety of roles, moving between fields through engagement in multiple positions, that cut across the private, public and voluntary sector. One among the interviewees could serve as example of this engagement. As mentioned by the vice coordinator of grants and initiatives of the social enterprise Con i Bambini:

“We are fully owned by Fondazione con il Sud. But we are the implementing body of the Fund for the contrast of educational poverty of minors. This fund was established by ACRI, which groups together all foundations and savings banks in Italy, and by the government. We have no partners. We are a private entity that manages a fund that is made up half of public money and half of private funds.” (Interview, Con i Bambini, 2021).

### **Box 9.1 The project DigEducati**

The Bergamo Community Foundation (Fondazione Comunità Bergamasca) combats educational poverty by developing actions aiming at solving the problem of the digital divide in children aged from 6 to 13 promoting the “DigEducati” project. The initiative is financed by the social enterprise Con i Bambini through the Fund for the contrast of educational poverty of minors, with a contribution of 1,250,000 euros, and by the Fondazione Cariplo with a further contribution of the same amount.

The DigEducati project for the three-year period 2021-2024 promotes activities to increase the digital skills of children and their parents through a large network of partners based in the municipalities of Bergamo: 14 local authorities, the library network, 4 consortia of social cooperatives and the university. These collaborations will also be extended to third sector organizations and other stakeholders addressing and identifying situations of need.

As part of the project, 400 devices with internet connectivity are made available to families of children in conditions of economic, relational and educational poverty. The devices were previously donated and configured to support a circular economy system.

The project also envisages the creation of a digital platform to support education on the basis of the needs identified in dialogue initiatives with middle school pupils, families and teachers, with particular attention to pupils with disabilities and sensory difficulties.

The University of Bergamo is also promoting the participation of adult students in the project as tutors trained to respond to educational needs and, at the same time, to fill the pupils' gaps in the use of IT tools.

An important component of the project is the creation of spaces where children, teenagers, adults, parents and teachers can find support for accessing and using digital contents. To date, there are 40 community points distributed throughout the Bergamo area. These operational nodes are located in public libraries, cooperatives, oratories or other places made available by the project partners. These nodes are community cultural meeting spaces where children, parents and teachers can receive assistance from educators specially trained on digital skills topics.

Source: <https://www.fondazionebergamo.it/digeducati/>

The social enterprise Con i Bambini crosses different bridge interests, blurring between various fields and converging in their practices. It also accumulates a significant volume of *social capital*, as explained by the vice coordinator of grants and initiatives of the social enterprise:

“We mainly address third sector entities, but these entities cannot present themselves on their own. They must create a broad, heterogeneous, complementary, meaningful partnership, also made up of schools, institutions, local authorities, municipalities, parishes, profit organizations, trade associations. We try to support projects that are carried out by very significant networks.” (Interview, Con i Bambini, 2021).

Hence, much of the networking activity of boundary spanners is “invisible”, meaning that it occurs through personal relationships, where social, business and political networks intertwine. Boundary actors will to address in innovative ways public policy problems, by providing not just financial means but also skills, legitimacy and authority, that make philanthropic and civic engagements a form of moral capital. They become contemporary “cultural heroes”, carrying with them values, methods, discourses and commitment (Ball & Junemann, 2012, p. 91). Among the interviewees, the head of programmes of Nesta Italia serves as an example:

“Nesta Italia, as Nesta UK, deals with the expertise in the support of social innovation. And the areas we work on in Italy are basically health, ageing of the population, education, inclusion, emerging technologies, art and culture. In each one of these fields, we use the methods that are the most appropriate to solve the problems that we identify in the different contexts.” (Interview, Nesta Italia, 2019).

In addition, as stated by the youth years programme manager of Ashoka Italia, this NGO aims to *change the systems* and the mindset that are behind the emergence of social problems:

“These are programs, together with others that we promote, that [...] are useful to change the systems, from one side, and most of all the paradigm and mindset which are behind the emergence of social problems. This is why, a movement that says “Everyone is a changemaker” allows us to redefine the idea of success, the growth experience, a series of things like those ones.” (Interview, Ashoka Italia, 2020).

The *civic engagement* of philanthropy towards public policy problems is also confirmed by the president of Teach for Italy. Specifically, in the field of education, this NGO aims at ensuring that:

“there is an increase in the quality and level of teaching, of the profiles that choose teaching at an international level.” (Interview, Teach for Italy, 2021).

In addition, new philanthropic actors are also members of a strongly interconnected and *powerful corporate elite* and play senior management roles in leading financial institutions. As the respondent of Teach for Italy continues:

“The steering committee is composed of people that have experience in different areas that are all related to the common theme of social innovation. We consult these subjects from a point of view of advices about contents, to gain access in terms of networks, because

they are very connected to networks, or to develop projects together. They also have a role of advisors on projects for what they are asked an opinion.”

Moreover, regarding the *interconnected roles* of the senior management members, the coordinator of activities and program manager of Fondazione Fits argues:

“The secretary general, in particular, has always been a social entrepreneur in life. Here, there are some collaborators who have more tools to understand if the project actually brings something innovative or not.” (Interview, Fondazione Fits, 2021).

New philanthropic organizations also move between and operate across different but highly interrelated social fields of business, politics, philanthropy and the public sector. This is confirmed by the head of programmes of the foundation Nesta Italia, who argues that the banking foundation Compagnia di Sanpalo:

“[...] supports the organization [...] So, we have a very good relationship with Compagnia di Sanpalo. They have facilitated the arrival of Nesta in Turin and surely have a very important role in the activities of the foundation. [...] In terms of activities there is a lot of freedom and support. So, it is a good relationship.” (Interview, Nesta Italia, 2019).

Thus, new philanthropists have numerous roles in different fields and accumulate several and significant relations within each. As mentioned by the president of the NGO Teach for Italy:

“I run the association. Essentially, I created it, I founded it, I manage it. And therefore, I do medium, long-term programming, I manage the staff that works in the organization. I deal in particular with partnerships, fundraising and institutional relations.” (Interview, Teach for Italy, 2021).

All these extracts of the interviews with the new philanthropic actors focused on the governance of digital education underline the multiplicity of roles that organizations are able to cover in the various social fields of the private, business and public sectors. Finally, Table 9.7 provides a summary of these roles, introducing the types of activities related to each role exercised.

**Table 9.7 Roles of boundary actors in Italian digital education networks**

<b>Roles of boundary actors</b>	<b>Types of activities</b>
<b>Moving between fields through engagement in multiple positions that cut across the private, public and voluntary sector</b>	Managing funds that are made up of public money and private funds
<b>Accumulating a significant volume of social capital</b>	Supporting projects carried out by significant networks: broad, heterogeneous, complementary, meaningful partnerships, made up of schools, institutions, parishes, profit entities, etc.
<b>Acting as “changemakers”</b>	Implementing programmes that are useful to change the systems, paradigm and mindset which are behind the emergence of social problems
<b>Participating in a strongly interconnected and powerful corporate elite</b>	Providing experience in different areas related to social innovation and their connections inside different networks
<b>Playing senior management roles in leading financial institutions</b>	Acting as social entrepreneurs having the tools to understand if a project can bring something innovative or not
<b>Moving across highly interrelated social fields such as business, politics, philanthropy and the public sector</b>	Dealing with fundraising, programming, networking and managing the staff

### **9.2.3 Investigating social investment strategies in digital education networks**

In order to confirm or reject the first hypothesis of the research, the empirical analysis provided in this chapter has introduced an Italian fieldwork to understand if social investment strategies in education implemented by new philanthropic organizations are facilitated by digital education networks in which these actors are involved. In accordance with the data analysis, the hypothesis is confirmed. Though, it is important to underline that the new philanthropic organizations analyzed in this thesis are mainly connected at the local and national level than at the European one. In fact, only four actors composing the fieldwork have relations with European partners. The nodes linked to the European organizations are mostly foundations that have a high density of relationships and occupy the central areas of the networks displayed in the graphs, such as: Fondazione Cariplo, connected to European private actors (for example the Kessler Foundation, Fondation de France, King Baudouin Foundation, Gulbenkian Foundation, European Foundation Centre) and the European Commission; Fondazione Fitis, linked to the European Central Bank and the Diesis Network, that supports European social enterprises; the



foundation Nesta Italia, connected to the European Commission and Nesta Uk; the European Digital Learning Network association linked to the working groups of the European Commission.

Moreover, as will be illustrated in paragraph 9.3, marginal actors are placed in a national or regional dimension and in a few cases compose thematic clusters. Among these actors there are: Amici di Peter Pan, Eufemia and Passo dopo Passo...Insieme. These new philanthropic organizations are connected at the European level through actors who play the role of boundaries between the Italian and European dimension, such as the Fondazione Cariplo. As mentioned by the head of international relations of the foundation:

“We have projects that are international, since more than ten years ago we developed an important relationship with a series of subjects at the international level. In short, who are these subjects? Firstly, the networks of intervention. A network that you will know well is the European network of foundations, the European Foundation Centre, which is based in Brussels. It includes foundations like ours, that is to say provision foundations. Even if, during the latest years, they have opened the access to some NGOs. [...] We are also part of the European Venture Philanthropy Association, which is based in Brussels, because as you well know there are other instruments in addition to non-repayable funds, related to funds for innovative start-ups in the field of research or technology. This is to give you an idea of the reference networks in which we are members of at the European level. And I would say that the focus is more the one of the links, the connections. We say that we are there and for what reasons. This is also true at the international level” (Interview, Fondazione Cariplo, 2020).

Among the strategies adopted by the boundary actors to connect to the European network of social investment in digital education, the Fondazione Cariplo acts in order to facilitate “smaller” organizations to apply for grants. As explained by the interviewee, the foundation has designed a strategy to apply to Community grants, based on the approval in advance of missing contributions:

“We have asked to ourselves: how can we help the local or Italian organizations to apply with more strength or in a more solid way to Community grants? We have conceived a mechanism. We have approved in advance the missing contribution. For example, a project of 100 thousand euros was missing 20 thousand. We agreed the contribution of 20 thousand in advance, subordinate to the approval of the European Union. If the European Commission evaluated positively this project idea, we could provide what was missing. For the organization, this has been very helpful, because it applied to the grant already with a funder, accompanied by a letter in which we declared that in the case the organization accepted the European fund, Fondazione Cariplo would have provided the amount which had been missed. And we know to be considered as a quality labelling.”

The head of international relations of the Fondazione Cariplo describes in detail the structured process to support the more isolated new philanthropic organizations in obtaining funds from the European institutions. In addition, as mentioned by the interviewee, the partnerships with European actors focused on philanthropy, such as the European Foundation Centre and the European Venture Philanthropy

Association, are significant in order to be involved in the European digital education network and access to the European institutions' tenders.

#### **9.2.4 Limitations and future research directions**

The empirical analysis was characterized by some limitations, as explained in the first part of the thesis. In fact, the ongoing pandemic crisis has slowed down the investigation due to travel restrictions and remote work. As a consequence, the empirical material lacks participatory observations and interviews were conducted by phone or using platforms such as Google Meet, Skype and Zoom. Moreover, the fieldwork extended on a long period of time (2018-2022) and some data concerning the connections of the studied organizations could have changed to date.

Thus, in further research on social investment in European digital education, after having better structured the fieldwork, it could be useful to analyze more recent connections between new philanthropic organizations and other public and private actors at the European level, by deepening some issues related, for example, to the implementation of departments for external relations by the actors that lack in its establishment, in order to understand if this activity is better structured so to allow new philanthropic organizations to access to different advantageous networks. It could also be valuable to update systematically the database of contacts between the marginal actors and the organizations they relate to for grants, in order to understand how much the isolated actors are dependent on more connected organizations, or boundary actors, to obtain funds to finance their projects and be involved in the global European digital education governance. Finally, a periodic analysis of the issues concerning the projects carried out by new philanthropic organizations focused on digital education could be useful to understand what the lacks in the public educational system are and which need to be resolved by new philanthropic organizations.

#### **9.3 An analysis of digital education networks**

This paragraph presents figures of social investment networks focused on digital education, with the aim of exploring the first objective of this thesis and clarifying, through graph visualizations, what are the main actors and the dynamics they produce in these networks. The graphs visualize the relationships between Italian new philanthropic actors focused on social investments and digital education, according to the clusters outlined below (see table 9.8). The visualization of each figure is different: in the first map (Figure 9.1) the new philanthropic organizations are displayed according to their distribution in the network; in Figure 9.2 the organizations are visualized referring to their type, meaning that actors of the same type are displayed in the same colour; in the third map (Figure 9.3), new philanthropic organizations focused on social investment are showed according to their connections; in Figure 9.4 the organizations are presented with respect to their social investment strategy in digital education.

The figures also display different clusters of actors, going from heavily populated to less populated groups. Thus, maps have lower and higher density and contain many or fewer “small” networks. Nevertheless, before moving to the analysis, as a disclaimer for the rest of this paragraph, it is useful to underline that the following visualizations do not aim to offer an exhaustive account of all Italian new philanthropic organizations focused on social investment in digital education, but rather they are a purposeful selection of actors that provides a rendering of the digital education networks in which they are involved and the social investment strategies adopted in these networks, suggest research directions and provide discussion ideas.

### **9.3.1 Network visualization by distribution**

The graph in Figure 9.1 includes nodes and edges concerning an Italian social investment network composed of new philanthropic organizations focused on digital education. Starting from the online database Italia non profit, the analysis identified 15 new philanthropic organizations giving rise to a network of 140 nodes and 154 connections, or edges. Such network has a relatively centralized structure, and the centre is mainly occupied by foundations.

In the network, organizations that are connected to each other are depicted in the same colour. The network shows an average degree (the number of connections of each organization to others) of 2,216: the central cluster is composed by foundations (Fondazione Cariplo, Fondazione Pirelli, Fondazione Fits) and is surrounded by isolated actors, such as Alleanza per l’infanzia (Alliance for Childhood) and Big Picture Learning. It is also possible to identify some more or less interconnected groups, for example those involving the NGOs Ashoka Italia and Teach for Italy, linked through Fondazione Agnelli (company foundation) in the top right of the graph, the association Amici di Peter Pan and the social enterprise Con i Bambini on the left in the image, and Eufemia, Fondazione Cariplo, Nesta Italia and Ashoka Italia connected through Compagnia di Sanpaolo (foundation of the Intesa Sanpaolo bank) in the top centre.

Moreover, the relationship between connected actors is generally mediated by banking foundations, such as Turin saving bank foundation, Cuneo saving bank foundation, UniCredit Foundation and Compagnia di Sanpaolo. These foundations are able to connect different new philanthropic organizations: Fondazione Cariplo, Fondazione Pirelli, Fondazione Fits, Fondazione Arnaldo Pomodoro, Nesta Italia, Eufemia, La Fabbrica dei Suoni, Passo dopo Passo...Insieme, Amici di Peter Pan, Ashoka Italia and Teach for Italy.

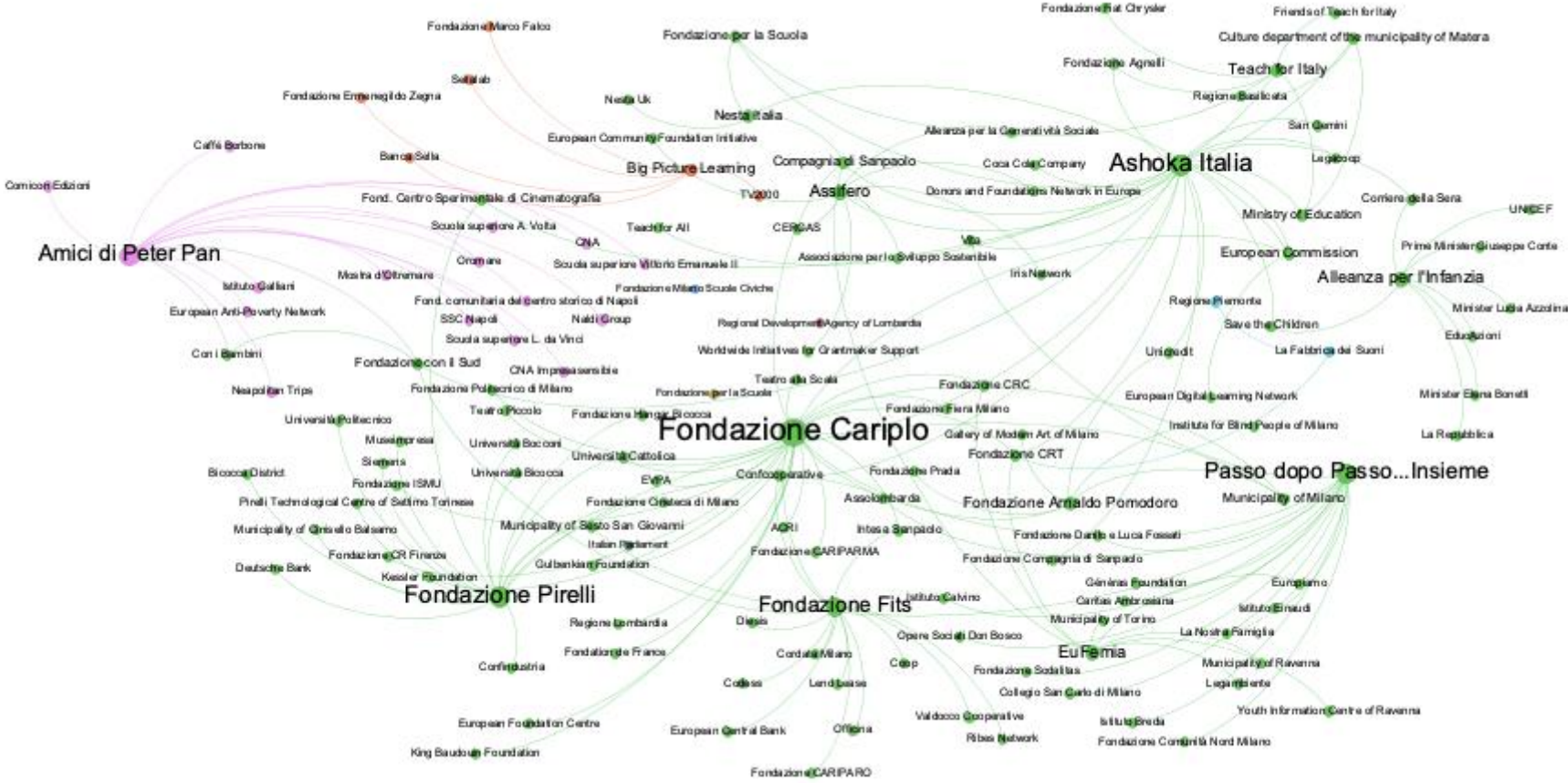
Regarding the European level, it is showed that four actors are directly connected to the European Commission. These are: Fondazione Cariplo, Nesta Italia, Ashoka Italia and the association European Digital Learning Network. Whereas, standing on the information provided by the interviewees, other smaller actors are disconnected from the European dimension. Finally, Figure 9.1 is a partial representation of the relations between Italian new philanthropic organizations focused on digital education and other public and private actors. It does not run out all the possible connections, but it can

be considered an indicator of the interdependences between the different actors composing the Italian digital education network analyzed in this study.

**Table 9.8 Topological dimensions of visual analysis of Italian new philanthropic actors classified by distribution**

<b>Dimensions</b>	<b>Type of organizations</b>	<b>Visual representation</b>
<b>Centers</b>	Private and banking foundations	Nodes displayed at the centre of the graph attracting most of the connections
<b>Boundaries</b>	Private and saving bank foundations	Connecting organizations of different type positioned around marginal actors
<b>Margins</b>	Associations, cooperatives, voluntary organizations	Isolated nodes located in the peripheral areas of the network

Figure 9.1 Italian digital education network displayed by distribution



### 9.3.2 Network visualization by type of actor

The network visualized in Figure 9.2 displays Italian new philanthropic actors involved in digital education and coloured by type. What emerges at a first glance is the predominance of foundations (23.57%), followed by associations (12.86%) and Italian public authorities (11.43%).

**Table 9.9 Types of organizations in Italian new philanthropic networks**

Type of organization	Presence in the network (%)
Foundation	23.57
Association	12.86
Italian public authority	11.43
Cooperative	7.86
Network	7.86
School	6.43
Business organization	5.71
Bank	4.29
Italian cultural institution	3.57
Academic organization	2.86
Media	2.86
Multinational	2.14
NGO	2.14
Foreign public authority	1.43
Manufacturing company	1.43
Voluntary organization	1.43
Moral entity under the private law	0.71
Social enterprise	0.71
Think Tank	0.71
Total	100

The very central position of Fondazione Cariplo is particularly significant: its predominant role contributes to the creation of a centralized structure of the network that has effects on the relationships of new philanthropic organizations involved in Italian digital education. Indeed, both in the map by distribution (Figure 9.1) and by type (Figure 9.2), organizations are positioned in relation to the centre rather than in relation to each other. The result is a network where marginal actors are located all around (see, for example, Alleanza per l'Infanzia in the top centre and Big Picture Learning in the left margin).

Comparing the nodes, other interesting insights emerge from the observation of the network in Figure 9.2: foundations play the role of hubs by guaranteeing the connections of the network and, on the other hand, associations, foundations and cooperatives are interconnected among each other through peripheral relations and constitute thematic communities in the map. For example, on the top left, the

association Amici di Peter Pan is linked to the social enterprise Con i Bambini through Fondazione con il Sud (Foundation with the South), building a thematic network around the issue of educational poverty. As explained by the president of the association Amici di Peter Pan:

“Foundations finance the third sector through grants. Several of our projects come from there. Fondazione con il Sud and the social enterprise Con i Bambini, are those that pay attention to, above all, the south, because they have dedicated funds.” (Interview, Amici di Petr Pan 2021).

It is also possible to notice other thematic clusters: on the top right of Figure 9.2, the NGOs Teach for Italy and Ashoka Italia are connected in a “small” network through Fondazione Agnelli to achieve inclusion and innovation in education in Italy. In fact, as mentioned by the president of Teach for Italy:

“We have three or four strong institutional partners, which are Fondazione Agnelli, Compagnia di San Paolo, Fondazione per la Scuola [banking foundation focused on education and linked to the Intesa Sanpaolo bank] and the Fiat Chrysler Foundation. They are all foundations, which have been dealing with educational inequalities for more than twenty years. And, therefore, they finance work on inequalities, especially in schools.” (Interview, Teach for Italy, 2021).

As specified on Ashoka Italia website, the NGO is connected to the Fondazione Agnelli. Moreover, the interest towards social inclusion is confirmed by the youth years programme manager of Ashoka Italia, who states:

“In decision and creation processes it is necessary to obtain an active participation of all players beyond their level. Not only hierarchic level, but also generation level. This is the reason why, at the table of decision-making there must be children, young people, adults, labourers as the managers.” (Interview, Ashoka Italia, 2020).

A third group is that in the bottom right of the map. It is composed by EuFemia, an association that deals with digital education projects in Turin, and banking foundations: Turin saving bank foundation (Fondazione CRT), Cuneo saving bank foundation (Fondazione CRC) and Compagnia di Sanpaolo. Thanks to the connections with these foundations, which in turn are linked to Fondazione Cariplo, EuFemia is able to link indirectly to this central node and, consequently, be less isolated in the network. As stated by its president, the funds provided by banking foundations are fundamental to carry out the different activities of the association:

“[Foundations] are lenders-stakeholders, in the sense that 95% of our funding comes from projects, 50% of which, let's make 40 now, from banking foundations to which we present projects.” (Interview, EuFemia, 2021).

A summary of the topological dimensions of the visual representation provided in Figure 9.2 is introduced in the table below.

**Table 9.10 Topological dimensions of visual analysis of Italian new philanthropic actors classified by type**

<b>Dimensions</b>	<b>Characteristics</b>	<b>Visual representation</b>
<b>Centers</b>	Private and banking foundations	Hubs guaranteeing the connections of the network
<b>Boundaries</b>	Private and saving bank foundations	Organizations taking part to thematic networks (for example, social inclusion) and linking actors together
<b>Margins</b>	Associations, social enterprises, cooperatives, voluntary organizations	Marginal actors interconnected with each other through peripheral relationships and constituting thematic communities



### **Box 9.2 Batti il cinque!: a community project between northern and southern Italy**

The social enterprise Con i Bambini, as part of the call New Generations, has selected and approved "Batti il cinque!", a project presented by a network of community foundations operating in different areas of Italy to address the problems related to educational poverty.

"Batti il cinque!" started in autumn 2018 and lasted three years providing for common actions which were declined differently by each foundation. "Con i Bambini" has approved a contribution of €2.7 million, out of a total project value of €3.5 million.

The project was presented by the Community Foundation of the Lecco area (Fondazione Comunitaria del Lecchese), as the lead body, the Community Foundation of Brescia (Fondazione della Comunità Bresciana), the Mirafiori Foundation (Fondazione della Comunità di Mirafiori), the San Gennaro Foundation of Naples (Fondazione di Comunità San Gennaro) and the Messina Community Foundation (Fondazione di Comunità di Messina), with the coordination of Assifero, the Italian association of foundations and philanthropic organizations, which is also a partner of the initiative.

The goal is to allow children between 5 and 14 years old to participate in supplementary activities within schools, such as afternoon sporting and cultural experiences, meetings with families and trainings. In particular, three lines of intervention were envisaged within the project:

- fighting school dropout;
- building "educational pacts" with the families and the community;
- promoting scientific, technological and digital development.

As declared by Bruno Manghi, President of the Mirafiori Community Foundation:

"The most interesting aspect of the project is the group of foundations and specialists who have gathered to discuss the dimension of childhood, an area in which investments have so far been very modest. Projects like this allow to reverse the course for our territory and the fact of working as a team allows to build a possible future for the new generations"

Source: <https://fondazionemirafiori.it/batti-il-cinque>

Additionally, as seen through the interviews, marginal actors are mainly organized around three themes of interest, that are simplified in Table 9.11.

**Table 9.11 Issues of interest to marginal actors**

Clusters	Connections between actors
<b>Educational poverty</b>	Amici di Peter Pan (association) and the social enterprise Con i Bambini are connected through Fondazione con il Sud (public-private foundation)
<b>Social inclusion</b>	Ashoka Italia and Teach for Italy (NGOs) are connected through Fondazione Agnelli, which finances works on inequalities in education
<b>Digitalization of education</b>	EuFemia (association) is connected to the banking foundations Compagnia di Sanpaolo, Fondazione CRT and Fondazione CRC, that finance projects in digital education

Among these marginal groups, some show a densely connected texture and are defined by geographic diversity, such as those involving Amici di Peter Pan and Passo dopo Passo...Insieme. Amici di Peter Pan is an association based in Naples whose mission is, as declared by its president:

“[...] youth orientation and training of children in educational poverty and risk of social exclusion, and socio-economic poverty.” (Interview, Amici di Peter Pan, 2021).

Moreover, Passo dopo Passo...Insieme is a voluntary organization based in Sesto San Giovanni, province of Milan, that is involved in supporting the school motivation of pre-teens through an after-school project.

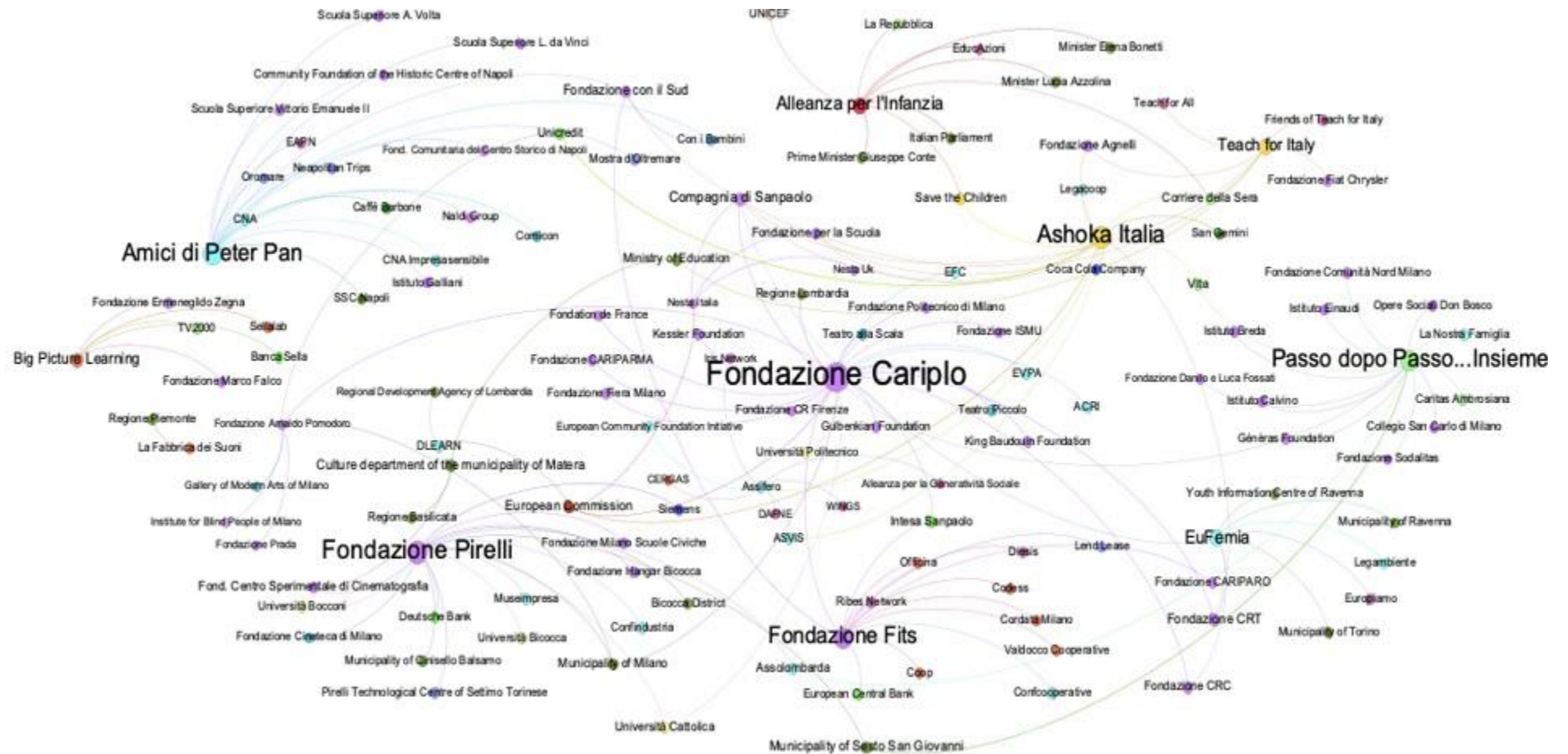
Amici di Peter Pan shares the geographical location (Neapolitan area) with its connected nodes. Indeed, its prevailing relationships are maintained with schools, associations and foundations based in Naples and in the Campania region. Among these relationships, there are those with the Foundation of the historical centre of Naples (Fondazione comunitaria del centro storico di Napoli), National Confederation of Crafts and Small and Medium Enterprises of North Campania region (CNA Campania Nord, Confederazione Nazionale dell’Artigianato e della Piccola e Media Impresa Campania Nord) and Naldi Group (business group). Specifically, as mentioned by the president of the association Amici di Peter Pan, the partnership with CNA Campania Nord is fundamental for the association:

“Amici di Peter Pan raises funds for more than a half of the total annual budget. The profit partner is important to us because it finances projects. The main partner is the CNA [...]”

Passo dopo Passo...Insieme is linked to foundations based in the province of Milan, such as Community Foundation North Milan (Fondazione Comunità Nord Milano) and Génèras Foundation. The organization is also connected to local schools with which it collaborates in order to recruit volunteers for its after-school project “Meglio dopo, Insieme”. Hence, it is linked to the voluntary organization Caritas Ambrosiana and the association La Nostra Famiglia. Whereas, at the national level, it is connected to Fondazione Cariplo.

Concluding, what this map tries to clarify is that the central cluster, composed of foundations involved in Italian digital education governance has shaped in an organized way mainly through thematic clusters and the provision of grants. Whereas, as seen, marginal and geographically linked nodes are able to build communities based on thematic interest and aiming to gain funds from more connected organizations such as banking foundations.

Figure 9.2 Italian digital education network displayed by type



### 9.3.3 Social investment strategies of Italian new philanthropic organizations

In this section, the organizations composing the Italian digital education network analyzed in the thesis and focused on social investment are displayed. The graph consists of 110 nodes and 126 edges. The network shows a relatively low density: around the central core, composed by the most connected nodes, the other actors organize independently and are located at the margins of the network. The central area of the network is occupied by Fondazione Cariplo.

Distinguishing zones with unequal density of connections is important to understand why connections are established. In the case of the main actor, Fondazione Cariplo, it can engage in relationships for *project design* goals. In fact, as mentioned by the head of international relations of the foundation:

“It often happens that in relation to the issues we deal with, there's a component of network, of data collection, data treatment which can be assigned to other foundations, as the Fondazione ISMU [Foundation ISMU – Initiatives and Studies on Multiethnicity, Iniziative e Studi sulla Multiethnicità]. [...] There's also a very strong component of evaluation of impact. Or there's a very important component of data research. There could be the Polytechnic University, rather than the Catholic University or others.” (Interview, Fondazione Cariplo, 2020)

Another important strategy of social investment is the search for *partnerships*. As mentioned by the head of applied research and promotion of the human capital of the Fondazione Cariplo:

“We do a real due diligence work on partnerships proposed by others, or they can originate from relationships of networking, sharing of knowledge, dialogue with other networks or foundations or institutions.” (Interview, Fondazione Cariplo, 2019).

About the search for partnerships, it takes place in compliance with the rules established by each potential partner. As underlined by the vice president and coordinator of educational activities of Passo dopo Passo...Insieme:

“The search for partners actually takes place, as regards the search for funds, on the basis of what are the calls or the guidelines of each single foundation.” (Interview, Passo dopo Passo...Insieme, 2021).

Moreover, as stated by the respondent, the partners must share the mission of the organization:

“We must keep in mind what our mission and vision are. Our vision is that children feel good about school and, above all, the opportunities that school can offer. As a mission [...] everything that is there to support parents, teachers, educators, etc. However, with partners we must not go out of our mission.”

In addition, the practice of building *credible partnerships* is put in practice by Fondazione Fits. Around the issue of building credible partnerships, the coordinator of activities and project manager explains:

“Other evaluation criteria are also the partners involved. If they are credible. Because it happens that the partners may be valid, but the subjects who propose them may not be so credible.” (Interview, Fondazione Fits, 2021).

Finally, the importance of partnerships to achieve *visibility objectives* is highlighted by the president of the association Amici di Peter Pan:

“Partners are important to us because they finance activities, or they give us visibility in terms of social marketing and they are financing partners in projects. Or, in short, they take the pupils to work for an internship.” (Interview, Amici di Peter Pan, 2021).

Within the network it is also possible to identify smaller clusters built around a specific strategy of social investment, such as the identification of *honourable initiatives* to finance. Indeed, as mentioned by the coordinator of activities and project manager of Fondazione Fits,

“the mission of the foundation has always been to identify those virtuous initiatives, which have interesting business models.” (Interview, Fondazione Fits, 2021).

Moreover, as she continues, what the foundation does: “is precisely checking that the model is sustainable.” So, a first *economic-financial check* is allowed by:

“[...] trying to understand if the project can stand up, if it makes sense. [...] The evaluation lies in understanding if a need has been identified, there is an answer that is innovative and if the way of responding to this need through a model is interesting for us.”

In addition, Figure 9.3 shows how Fondazione Fits acts locally by connecting to organizations, especially cooperatives (see, for example, at the bottom right the small network involving Fondazione Fits and cooperatives such as Codess, Cordata Milano, Officina and Valdocco) through a strategy of *project accompaniment*:

“The other main activity we carry out is that of project accompaniment, which we can also define as a sort of consultancy in the sense that we intercept the initial projects that are presented to us, or we identify ourselves on the territory which in our opinion have a particularly importance and innovative value, both from the point of view of the business model and that of social impact.”

Hence, among the strategies of social investment, the activity of *fundraising* is increasing in its relevance. This is confirmed by the respondents of the association Amici di Peter Pan and the voluntary organization Passo dopo Passo...Insieme. In the case of Amici di Peter Pan, the strategy of fundraising is shared with the board of directors. As mentioned by its president:

“I write the fundraising plan, I submit it to the board of directors of the association, which look at the markets, who to ask for money.” (Interview, Amici di Peter Pan, 2021).

This activity also requires to be segmented. In fact, as the interviewee continues:

"The markets are different, there are individuals, single donors. There is the world of business, the famous corporate, and then there are the major donors, those worth 500.000 euros and up, with whom you act."

Finally, fundraising is presented as a systematic activity, in the sense that its planning must be reviewed and updated in order to achieve greater donations:

"The strategic plan must be reviewed every six months, to see if you are achieving the objectives of the annual plan or not."

In the case of the voluntary organization Passo dopo Passo...Insieme, the activity of fundraising is structured and regular. As explained by vice president of the organization:

"We have a fundraising consultant, and this is not a secondary, obvious fact. Because we have a person who dedicates part of his time to us. This is because fundraising has become neither easy nor difficult. It has become challenging and I don't have the time to physically look for the calls that come out. [...] Fundraising work has to be systematic. It cannot be done by chance." (Interview, Passo dopo Passo Insieme, 2021).

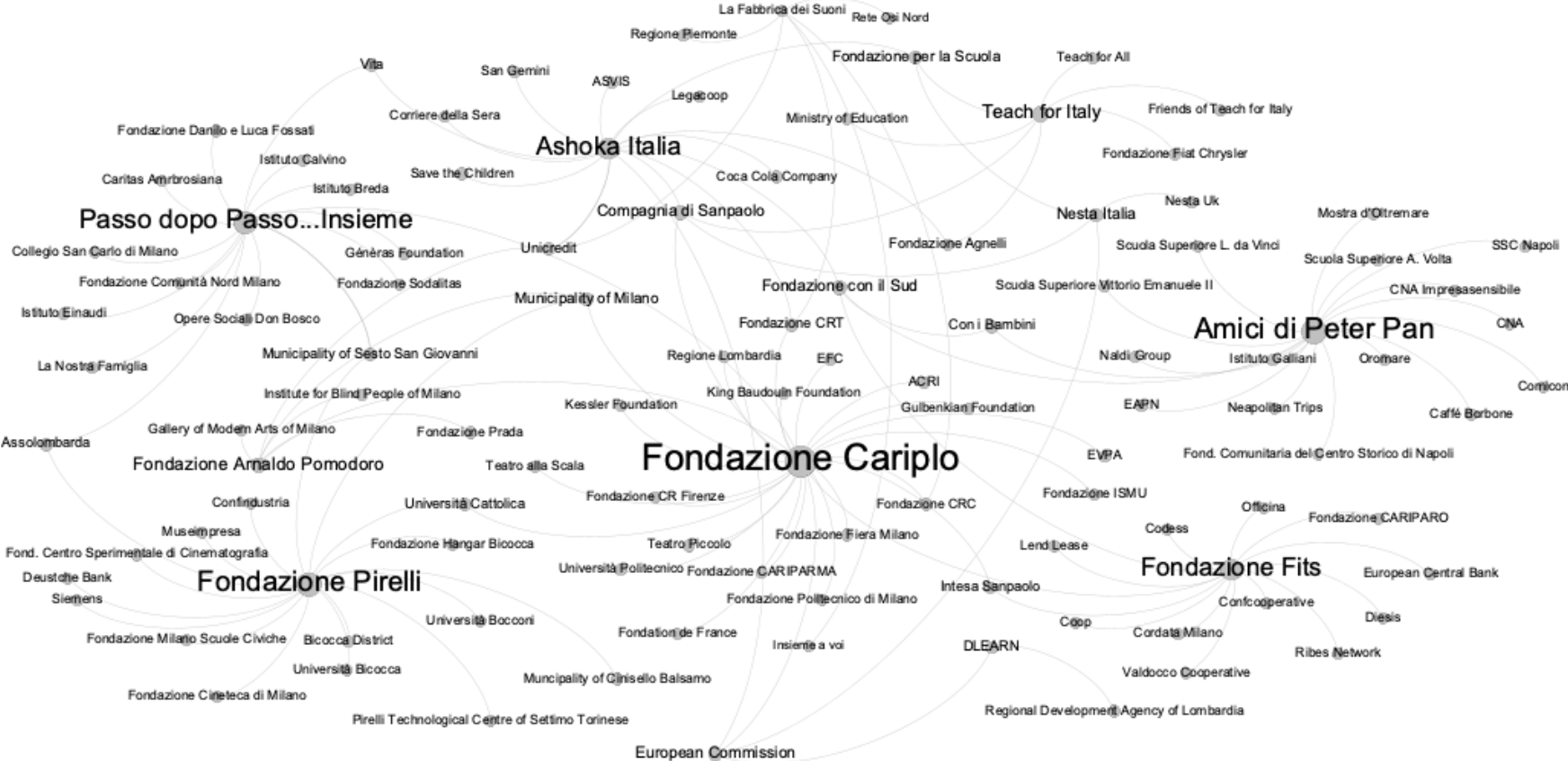
**Table 9.12 Classification of social investment strategies in Italian new philanthropy**

<b>Social investment strategies</b>	<b>Strategy-related activities</b>
<b>Searching for partnerships</b>	Conducting a due diligence work on partnerships proposed by others Evaluating the criteria for the partnership search required in each call for grants Selecting credible partners Sharing the mission with partners
<b>Participating in virtues initiatives</b>	Checking the sustainability of the model Evaluating a social need in the territory Proposing an innovative answer to the social need Responding to the need through an "interesting" model for the organization
<b>Accompanying projects</b>	Identifying innovative projects in the territory Consulting on projects submitted to the organization Evaluating the business model Estimating the social impact
<b>Fundraising</b>	Hiring a fundraising consultant Writing a strategic plan for fundraising Submitting the plan to the board of directors Reviewing the plan and the fundraising strategy periodically

In conclusion, the network displayed in Figure 9.3 illustrates the importance of establishing credible partnerships at the local, national and European level in order to implement successful social investment strategies focused on new philanthropic projects. Hence, what emerges from the data analysis is the necessity of a detailed preliminary assessment of the initiatives to be implemented in order to solve social needs, focused on a business model that can have a social impact and be “interesting” for the new philanthropists at the same time. Finally, the activity of fundraising is a complement to these initiatives and has been gaining so much attention in recent years, that it is carried out periodically and systematically.



Figure 9.3. Italian new philanthropic organizations focused on social investment



### 9.3.4 A display of Italian digital education networks

The map of Italian new philanthropic organizations focused on digital education (Figure 9.4) is composed of 89 nodes and 92 edges. It displays connections whose average degree is 1,074. Moreover, as in Figure 9.3, in Figure 9.4 the centre is occupied by foundations, specifically Fondazione Cariplo, Nesta Italia and Fondazione Pirelli. As we will see through the section, these central nodes implement digital technologies in education in order to develop projects in schools on a large scale, by following *plans of feasibility* and of *social impact*. Whereas, in the case of the marginal nodes (European Digital Learning Network, Big Picture Learning, La Fabbrica dei Suoni and EuFemia) digital technologies are mainly used to improve quality in teaching and learning at distance. In this last case, the use of digital technologies has increased after the spreading of the pandemic crisis.

Fondazione Cariplo, which is the central node in the network, has implemented a large number of projects concerning digital technologies in education in recent years. The head of applied research and promotion of the human capital of the foundation highlighted the characteristics and relevance of the project called “SI”, focused on the development of human capital through the offer of technology and training donations to technical schools in the Lombardy and Piedmont regions. As mentioned by the respondent:

“The foundation has invested in the technical training because, in this period which is particularly characterized by a very strong digital transformation and by the entrance of the so called industry 4.0 in the entrepreneurial system, not only in Italy but throughout the world, we can say that a gap has emerged between the competences that are required by the local companies and the qualifications that the graduated people have once they leave the technical institutes. [...] There is also a high request of technical graduates by the companies, but these companies can’t find the employees in the Italian digital system” (Interview, Fondazione Cariplo, 2019).

Hence, the central nodes compose a cluster of new philanthropic actors focused on recognizing the need for training in the field of educational technologies in order to resolve a gap between the demand for skilled workers on the part of the Italian labour market and the number of people trained on digital technologies. Within this central group, the foundation Nesta Italia focuses on improving the level of digital skills in Italian students. As explained by the head of programmes, through the Digital Skills in Italy project, the foundation:

“aims to help students or people looking for a job, to orient them in the labour market by providing information about what are the most requested digital skills and the most requested professions.” (Interview, Nesta Italia, 2019).

The programme, also:

“aims to obtain recommendations and data useful for who is working in the field, big companies that deal with training, providers, policy-makers, universities, so that they can rethink about their courses.”

As declared by the interviewee, the aim of the programme Digital skills in Italy, created in collaboration with the banking foundation Fondazione per la Scuola, is to draw up a report on digital skills:

“[...] with the idea that, if a mismatch exists between demand and supply of labour, it’s because there is a series of unemployed subjects, or a series of subjects that are kept out of the labour market and don’t have access to it, that are displaced, that have always done a work in a certain way and don’t have the possibility to learn a new job [...].”

On these bases, Nesta Italia has made: “a series of assessments, to understand how to fill this mismatch.” Moreover, given the lack of training in digital technologies that characterizes the Italian academic offer, the head of programmes has observed the necessity of:

“a different way of teaching, more based on projects and team working, and a series of working methods more oriented towards the discovery made by the students thanks to their skills.”

Trainings in the use of technological instrumentation is also provided by the Fondazione Pirelli. In fact, as stated by the head of educational area:

“The use of technological instruments is essential to involve students and help them learn specific topics. During the years, we have introduced in our courses the use of tablets, 3D pens and educational robots.” (Interview, Fondazione Pirelli, 2019).

Also marginal actors have stressed the need for training in digital technologies. Specifically, as stated by the principal of the Big Picture Learning school, in distance teaching:

“The problem is the sequel concerning the implementation of all technologies. That is, as technology increases you have to increase the number of specialized people. [...] The big problem is that training teachers for distance teaching is not easy. But this is not a problem of distance learning in itself. It is a conceptual problem of the Italian school. We are extremely used to frontal work. [...] Only this requires enormous training and, above all, a cultural change of mentality that is very difficult to operate.” (Interview, Big Picture Learning, 2021).

The interest in the *support of digital technologies* in educational processes is also emphasized by the president of the European Digital Learning Network association, who explains:

“We all work for a common interest, that is understanding and exploring all the possibilities that nowadays the digital technologies offer to us to support the educational processes. So, translated into practice, in schools, digital technologies can be used to better teach children and students at secondary schools or high schools. We work with professional training centers to understand how they can take advantage by digital technologies. The same for the adult’s centers: we work with many adults’ centers that deal with disabled people. We try to understand how the digital technologies can help people with disabilities with their own education.” (Interview, European Digital Learning Network, 2019).

Among the marginal actors focused on digital technologies in education, the association EuFemia develops *media literacy* projects. It has implemented two projects aimed at children, teenagers and teachers. The first program is developed in schools in order to help young people understand the risks in using the social tools offered by smartphones and social media, and is executed through group activities. The second program is structured for teachers and is based on meetings that host practical activities. Moreover, among the projects of computer literacy there is the management of a free internet point. The project develops in two levels. As explained by the president, the basic level is focused on: “[...] what is a mouse, what is a keyboard, how to open an email.” (Interview, EuFemia, 2021).

Whereas, the advanced course includes an:

“analysis of the sources and understanding of the navigation system. So, what's behind a search engine and why it works how it works. And why some offers or proposals on the internet are free. How the tech-giants make money.”

As seen before, peripheral actors started new projects in the field of digital education during the spread of the pandemic crisis. In particular, these actors implemented or increased the use of digital platforms such as Google Meet and Zoom. As stated by the coordinator of the projects of motivation to study and promotion of volunteering of Passo dopo Passo...Insieme:

“We are carrying out the “Meglio dopo, Insieme” from remote for the current situation of the pandemic. So, using the Google Meet platform” (Interview, Passo dopo Passo...Insieme, 2021).

The use of digital technologies in order to carry out educational activities remotely is also underlined by the president of the association Amici di Peter Pan, who affirms:

“We have been forced to use them [digital technologies] since the pandemic onwards. The activities and training are carried out on platforms at the moment, not being able to do anything in presence for now. So, we had to buy new packs, including Zoom. We also had to expand the number of technological tools, such as PCs.” (Interview, Amici di Peter Pan, 2021).

Moreover, the cooperative La Fabbrica dei Suoni, which provides music education to children and adolescents, has created contents that can be educational and digital, to be used asynchronously. It has provided videos, in other words, storytelling, that draw attention and induce stimuli that may be of interest on specific issues, such as inclusion. As explained by the president:

“It's not going to Youtube, watching a video and, therefore, teaching. [...] And then it is not going alone on Youtube, which offers you dozens of other things and takes your attention away. There are these paths that are made up of several episodes, activities, in which the teacher will evaluate whether to exhaust these activities in a week or whether to dilute them over the course of a whole year.” (Interview, La Fabbrica dei Suoni, 2021).

In addition, as mentioned by the president and principal of Big Picture Learning, digital technologies in education are implemented for further objectives to distance teaching and learning:

“[...] we have a project called ZOT. Virtually every Thursday students from our entire international network can meet on Zoom. It is an excellent occasion to get to know each other and chat, because the idea is, in the future, to start intercultural exchanges within our network of schools” (Interview, Big Picture Learning, 2021).

Another additional use of digital technologies in education is the improvement of fundraising activities, as stated by the president of Amici di Peter Pan:

“Fundraising has become more digital in the sense that we could not have continued without using them [digital technologies]. We had to revise the database, because before it was an Excel sheet, now it is a specific program purchased from NP Solution [digital platform for fundraising]. We also use platforms for mass mailing, Mailchimp and others, for massiveness.” (Interview, Amici di Peter Pan, 2021).

The table below summarizes the uses of digital technologies in education by Italian new philanthropic central and marginal nodes identified in the studied network.

**Table 9.13 Uses of educational technologies by central and marginal actors**

Distribution of the actors in the network	Uses of educational technologies
<b>Central nodes</b>	Achieving social impact Solving the digital skills gap Helping young people in job orientation Improving quality in teaching methods
<b>Marginal nodes</b>	Carrying on distance teaching and learning Developing virtual contents on specific issues Meeting with other schools virtually Improving fundraising activities

As seen, the uses of digital technologies in education differ in respect to the distribution of the actors in the network. In fact, central nodes (Fondazione Cariplo and Nesta Italia), having a large number of connections, mainly develop educational technologies in order to implement large-scale projects, whereas more isolated new philanthropic organizations are focused on the use of digital technologies in education to carry on their teaching activities. However, the spread of the pandemic crisis has significantly increased the use of educational technologies by peripheral nodes.



## **9.4 Case study no. 1: Fondazione Cariplo**

As mentioned in the introduction of this chapter, one objective of the study is to investigate digital education networks, with respect to connections and strategic engagement of actors. Therefore, the following sections address this objective by analyzing the Fondazione Cariplo case study in its network financial features, and also in how public and private actors are engaged in its digital education network.

It should be noted that the findings presented here are based on network dynamics at a particular stage of the social investment strategy of the Fondazione Cariplo, covering the last few years, rather than constituting an overview since the constitution of the organization.

### **9.4.1 Internal organization and stakeholders**

The Fondazione Cariplo is the historical continuation of the Central Commission of Charity (Commissione Centrale di Beneficienza), founded in Milan in December 1816. From the beginning, the commission worked in the service of the local economy and supported the social and cultural growth of the Lombard community, through activities based on the principles of self-organization and subsidiarity. Formally, the Fondazione Cariplo was born in December 1991, following the restructuring process of the Italian credit system established by the Amato-Carli law, which aimed to start a broad privatization process.

The internal organization of the Fondazione Cariplo is made up of the Central Commission of Charity, composed of advisory commissions and sub-commissions, the president, the board of directors, the board of statutory auditors and the general manager. The president is Giovanni Azzone, elected in 2023. He is president of the Foundation Institute of Molecular Oncology (IFOM, Fondazione Istituto di Oncologia Molecolare). He is also a member of the Ethics Committee of AssoCunsult-Confindustria (Association of Organizational and Management Consulting Companies, Associazione delle Società di Consulenza Organizzativa e Direzionale). He has held various positions for the Presidency of the Council of Ministers, for the Ministry of Economy and Finance, for ISTAT (Italian Institute of Statistics) and for the Lombardy Region. He was also President of the Community Foundation of Milan, philanthropic support for the city promoted by the Fondazione Cariplo in 2018.

The Central Commission of Charity is the main governing body, in charge of defining the foundation's strategies with the support of the advisory commissions and sub-commissions. It also monitors the initiatives taken in the various fields of action of the foundation and dictates the strategic lines of the philanthropic activity, choosing the issues to pay attention to within the four relevant sectors of intervention: environment, art and culture, scientific research and personal services. Moreover, as declared by the deputy director of the Art and Culture area of the Fondazione Cariplo:

“There is a sort of parliament of the foundation that is the Central Commission of Charity, a kind of parliament that gives the addresses to the foundation and decides the themes to dedicate to and the subjects to work on.” (Interview, Fondazione Cariplo, 2019).

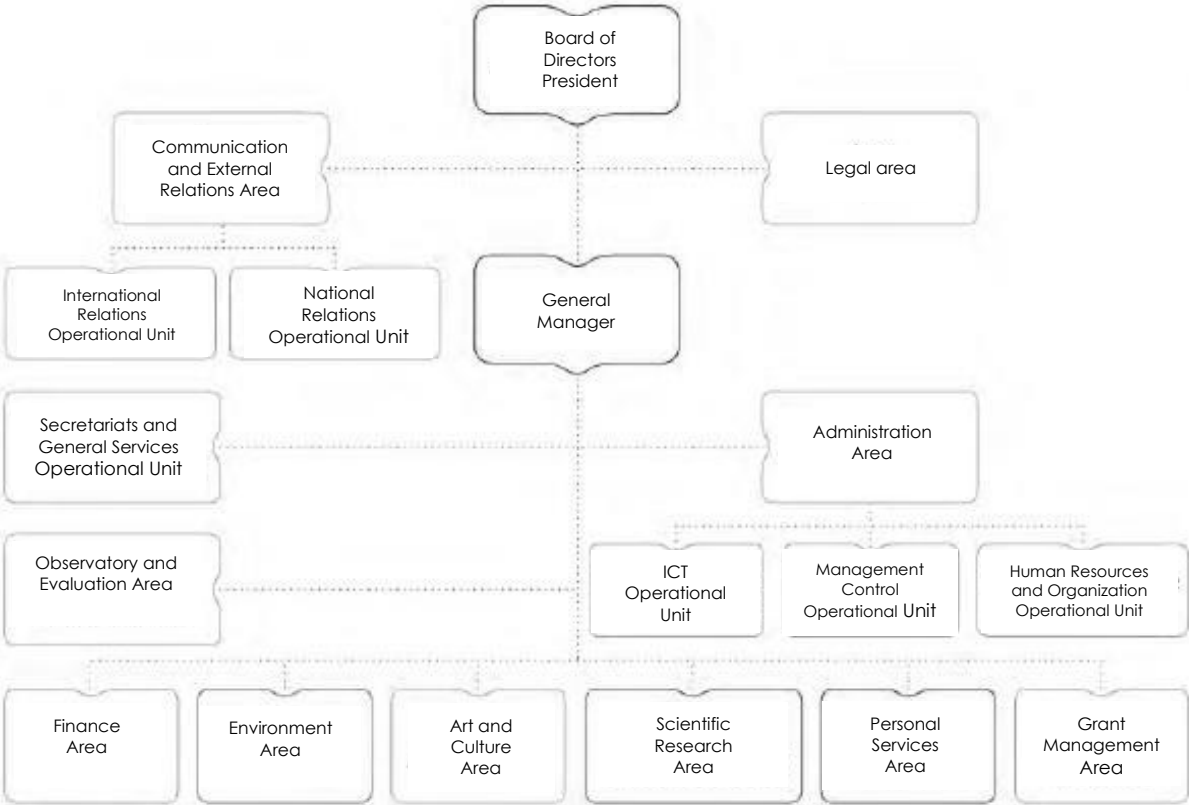
The board of directors has the task of approving the contributions that are assigned to the projects of non-profit organizations at the end of the evaluation procedure. As declared by the interviewee:

“Then, there is an executive organ that is the board of directors. In fact, the decisions are taken by the board on the base of the technical activity that is done in the offices.”

About the internal decision-making process, the respondent continues:

“A perfect example, within the “Culture” area, is this: the commission chooses to work on youth employment in the cultural or educational field; the offices work in the direction established by this commission and propose to the board of directors, that is the executive organ, the choices to adopt it or not. Usually, the board of directors trusts in what the offices propose. In synthesis, this is the decision-making process in the foundation.”

**Figure 9.5 Organization chart of the Fondazione Cariplo**

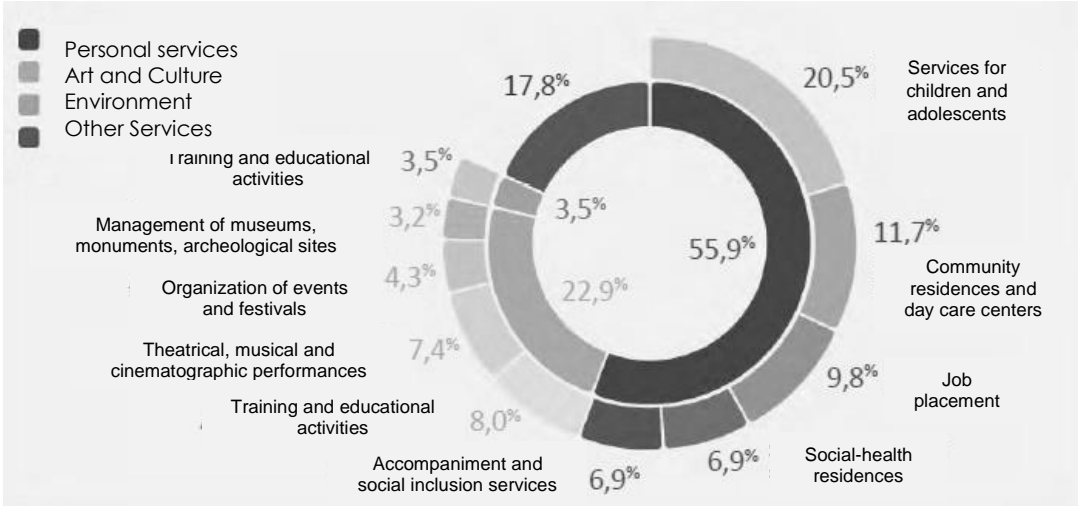


Source: Fondazione Cariplo, 2022b, p. 14



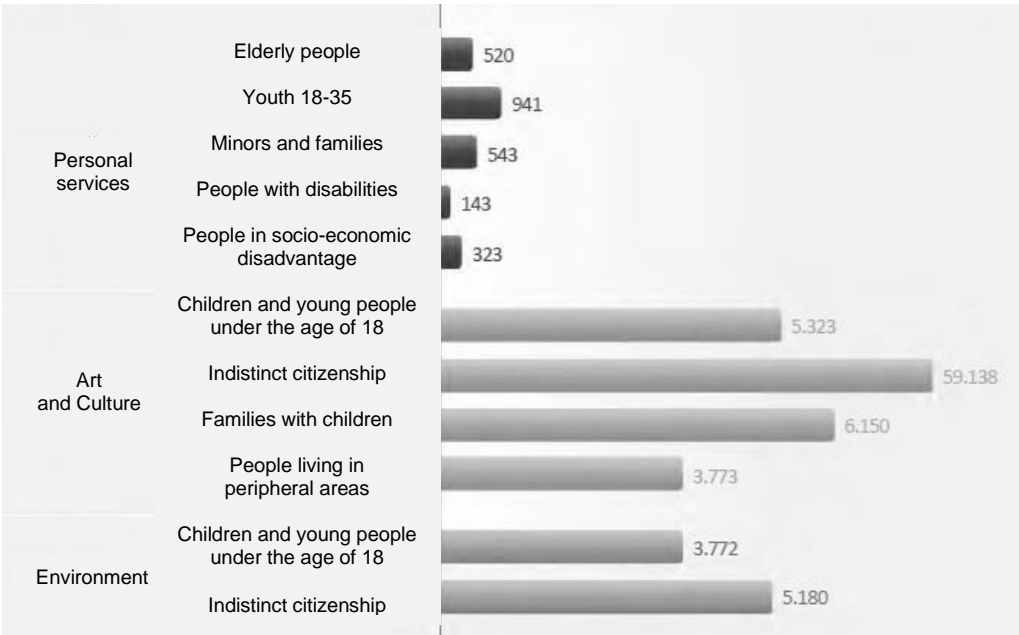
Since 1991, the Fondazione Cariplo has supported more than 30.000 projects carried out by non-profit organizations, with disbursements for a total amount of approximately 3 billion euros and an average of one thousand initiatives financed annually. In the last twenty years, 31% of the contributions have been allocated to Personal Services, 33% to the Art and Culture, 13% to Scientific Research, 4% to the Environment, 19% for philanthropy and volunteering. Moreover, at 31 December 2021, net assets amounted to €7,321 billion (Fondazione Cariplo website<sup>55</sup>). Figure 9.6 shows the main services supported by the foundation, while Figure 9.7 illustrates the main types of users served.

**Figure 9.6 Main services supported (% of entities)**



Source: Fondazione Cariplo, 2022b, p. 22.

**Figure 9.7 Main types of users served in 2020 and 2021 (entities average)**



Source: Fondazione Cariplo, 2022b, p. 23.

<sup>55</sup> <https://www.fondazione-cariplo.it/it/la-fondazione/patrimonio/patrimonio.html>

Finally, the foundation's stakeholders can be classified into four macro-categories as presented in Table 9.14. The stakeholders of our interest are those involved in the so-called “Cariplo World” (Mondo Cariplo), whose organizations are provided with funds and focused on sectoral programmes. As stated on the website of the Fondazione Cariplo<sup>56</sup>:

“Over the years, the Foundation has understood that in order to better follow up on the activities considered strategic it would have been necessary to have a real network of entities and companies which, although autonomous, operate in conjunction with the Foundation”

**Table 9.14 Categories of stakeholders of the Fondazione Cariplo**

<b>Categories of stakeholders</b>	<b>Relations with Fondazione Cariplo</b>
<b>Direct beneficiaries</b>	Benefiting from the grants provided by the foundation
<b>Indirect beneficiaries</b>	Using the benefits associated with goods and services generated by the projects
<b>Institutions of the “Cariplo World”</b>	Receiving grants from the foundation and being focused on sectorial programmes
<b>Statutory bodies and employees</b>	Making the foundation's operations possible: providing services, managing the disbursement of resources, implementing projects

Concerning the partners of the foundation, the deputy director of the Art and Culture area explains:

“At the national level, our principal partners are the public bodies of the territory in which we operate. Because, of course, we work mainly in the Lombardy region we have, among our privileged partners, the public bodies of this territory. So, the Region, the principal city offices, and so on. Then, there is a work of strong collaboration with the other Italian banking foundations, that are important partners, and then at the continental level, our partners are the other organizations that carry a similar work to ours. Mainly, foundations or the European institutions.” (Interview, Fondazione Cariplo, 2019).

Furthermore, about the relationships with the European institutions, the respondent argues:

<sup>56</sup> <https://www.fondazione-cariplo.it/it/la-fondazione/network/network.html>

“Generally, we develop projects together. For example, our foundation takes part to an international network of foundations that is called European Foundation Center, that is a big network of foundations, and by joining this network we develop, with the other foundations that work on similar activities, exchanges and real common initiatives. Exchanges, but also projects that we promote together on the respective territories.”

These dynamics of collaboration with other parties are also highlighted in the foundation mission statement, where it is declared that:

“For some delivery tools, the collaboration of the foundation with other foundations or public bodies and private individuals constitutes a central element for the realization of philanthropic initiatives. The foundation sometimes acts as a "lead partner", for example by providing a technical, legal and economic accompaniment service, making its IT platform available for the selection of grant applications or taking care of the reporting of the activities carried out. Between partners for example, other foundations of banking origin, the Lombardy Region and ministries are part of it and other public entities, institutional lenders (EU, international funding agencies) and others private philanthropic entities with which specific collaboration agreements have been stipulated.” (Fondazione Cariplo, 2022a).

#### **9.4.2 The financial resources of the Fondazione Cariplo**

At date, the heritage of the Fondazione Cariplo is €7.121.805.499. As stated by the deputy director of the Art and Culture area of the foundation:

“these seven billion euros are invested and every year they generate resources, returns, revenues. In a part we distribute them and, in another part, they are returned in the heritage for not to undermine their value during the years. The advantage of the foundation is that it doesn't have the necessity to ask for funds, because it has its own funds that are multiplied year by year.” (Interview, Fondazione Cariplo, 2019).

Moreover, the notes to the up-to-date financial statement provide extensive information on the economic activity of the foundation, on the trend of disbursements and on asset investment policy. As specified in the latest balance sheet (Fondazione Cariplo, 2022a), in 2021 the total assets increased overall by 2.47% from €7,892 million on 31 December 2020 to €8,087 million on 31 December 2021. The disbursements approved in 2021 are equal to €126.7 million compared to €141.6 million in 2020. Finally, the budget for the year 2021 records the activities indicated in Table 9.15.

**Table 9.15 Balance sheet of the Fondazione Cariplo (2021)**

<b>Balance sheet</b>			
<b>Incomes</b>		<b>Expenses</b>	
<b>Material and immaterial fixed assets</b>	€ 40,434,813	<b>Net assets</b>	€ 7,121,805,499
<b>Fixed financial assets</b>	€ 7,148,990,502	<b>Funds for the institution's activities</b>	€ 500,812,902
<b>Non-financial immobilized instruments</b>	€ 813,739,682	<b>Provisions for risks and expenses</b>	€ 114,699,380
<b>Credits</b>	€ 73,732,371	<b>Severance indemnity fund</b>	€ 2,980,679
<b>Cash equivalents</b>	€ 10,647,048	<b>Deliberate disbursements</b>	€ 329,560,194
<b>Prepayments and accrued income</b>	€ 217,602	<b>Volunteer fund</b>	€ 7,371,646
		<b>Debts</b>	€ 10,528,331
		<b>Accruals and deferred income</b>	€ 3,387
<b>Total incomes</b>	€ 8,087,762,018	<b>Total expenses</b>	€ 8,087,762,018

Source: Fondazione Cariplo, 2022a, p. 58.

In addition, as shown in the income statement (Table 9.16) the operating result for the year 2021 is €276,436,727.

**Table 9.16 Income statement of the Fondazione Cariplo (2021)**

<b>Income statement</b>	
<b>Dividends and similar incomes</b>	284,722,499
<b>Interest and similar income</b>	45,633
<b>Revaluation of dealing financial instruments</b>	7,871,932
<b>Trading result of dealing financial instruments</b>	269,687
<b>Net revaluation of financial instruments</b>	496,080
<b>Other proceeds</b>	9,488,028
<b>Management charges</b>	-14,822,886
<b>Extraordinary income</b>	31,015,279
<b>Extraordinary taxes</b>	7
<b>Taxes</b>	-17,988,393
<b>Provision pursuant to article 1, paragraph 44, of law 178/2020<sup>57</sup></b>	-24,660,125
<b>Management surplus</b>	276,436,727

Source: Fondazione Cariplo, 2022a.

<sup>57</sup> State budget forecast for the 2021 financial year and multi-year budget for the three-year period 2021-2023.

### 9.4.3 The social investment strategies of the Fondazione Cariplo

On average, more than one thousand projects are implemented by the Fondazione Cariplo every year through grants, for a commitment of about €150 million. Specifically, about the design-making of projects, the deputy director of Art and Culture area of the foundation explains:

“There is a sort of parliament of the foundation that is the Central Commission of Charity, which gives the addresses to the foundation and decides the themes to dedicate to and the subjects to work on. Then, there is an executive organ that is the board of directors. In fact, the decisions are taken by this board of directors on the base of the technical activity that is done in the offices.” (Interview, Fondazione Cariplo, 2019).

Moreover, about the projects' implementation, the head of applied research and promotion of the human capital of Fondazione Cariplo states:

“In general, before implementing a project we make an *analysis of the opportunities* and a *plan of feasibility*. So, we identify a need of the territory, that can be expressed directly in the area or from the investigations for sight, rather than by studies that are conducted by us, in which we see an opportunity of investment for the foundation and can have a relapse on the territory. On this base we decide to implement new programmes.” (Interview, Fondazione Cariplo, 2019).

Hence, the head of international relations of the Fondazione Cariplo, regarding projects' planning affirms:

“From one side, it's clear that, when we decide what our priorities are, we look at what other foundations in the world do, or listen to what research institutes say, financial policy institutes, think tanks. So, we don't decide by ourselves. [...] We listen to what others are doing, taking for granted that what others do starts from a data collection and analysis of tendencies and scenarios.” (Interview, Fondazione Cariplo, 2020)

Furthermore, the document titled “Action plan” establishes the foundation's intervention priorities, identifies the time horizon in which to place the operational tools (calls for grants, projects, disbursements, etc.), envisages the expected results of each activity through specific success indicators and creates a basis for monitoring and verifying the initiatives supported. Concerning digital education, the general aims of the plan can be declined in specific objectives on technology education by defining *intervention models*. Regarding the Fondazione Cariplo's attention to digital technologies, the head of applied research and promotion of the human capital of the foundation explains:

“The foundation absolutely cares. Especially at this time when digital technologies are becoming pervasive in all our businesses. From my point of view, one characteristic thing is that the technologies that we offer are very often a tool. So, we don't just aim to offer pure technology, because it can become the catalyst for further businesses, for example educational activities in schools, or activities of research in laboratories. We always try not

to provide only the instrumentation, because this must be contextualized inside a larger project.” (Interview, Fondazione Cariplo, 2019).

In summary, five social investment strategies in digital education can be identified thanks to the information provided in the interviews and which are presented in Table 9.17.

**Table 9.17 The social investment strategies of the Fondazione Cariplo and related activities**

<b>Social investment strategies</b>	<b>Activities</b>
<b>Analyzing the opportunities</b>	Identifying a need in the territory, that can be expressed directly, through investigations for sight or studies conducted by the foundation
<b>Preparing a plan of feasibility</b>	Through investigations and studies, identifying an opportunity of investment, that can have a relapse on the territory and can be implemented in new programmes
<b>Analyzing the tendencies and scenarios</b>	Looking at what other foundations do or listening to research institutes, policy institutions and think tanks
<b>Defining intervention models</b>	Achieving quantitative results in the promotion of embryonic policies of intervention to be implemented in agreement with institutions
<b>Contextualizing initiatives inside higher projects</b>	Not only offering pure technology, but considering instrumentation as a catalyst for further businesses

Regarding the involvement in digital education networks, a prominent role is played by the benefit company<sup>58</sup> of the Fondazione Cariplo called Cariplo Factory. It is made up of the sole shareholder Fondazione Cariplo and, as declared in its statute, intends to develop an ecosystem oriented towards innovation and aimed at activating collaborations and synergies between venture capital investors, traditional companies, hi-tech companies, informal education environments, social enterprises, universities, centers of research, schools and training institutions.

Hence, the benefit company is an “innovation hub” that provides capital investments, courses and entrepreneurial support programs following the values of competitiveness and inclusivity, co-designing projects and consolidating an ethical approach to the pluralism of ideas and the protection of vulnerable communities (Cariplo Factory website<sup>59</sup>).

<sup>58</sup> A benefit company combines profit objectives with positive impact for the advantage of the community.

<sup>59</sup> <https://www.cariplofactory.it/chi-siamo/>

Hence, Cariplo Factory has several funding partners, which are distinguished between main partners, corporate partners and official partners. The main partners are: Microsoft, Indaco Venture Partners SGR, Fastweb, Novartis and Terna Group. Among the corporate partners there are: Berkley Sky Deck, Cisco, ING, Nestlé, etc. The official partners are 42 organizations based in the Lombardy region, for example: Associazione Italiana del Private Equity (Italian Association of the Private Equity), Venture Capital and Private Debt, Associazione Nazionale Imprese ICT (National Association of ICT Companies), Italian Tech Alliance, Netcom (Association of Italian digital commerce).

The main objective in the educational field promoted by the Cariplo Factory is to offer experiential training courses to create new skills and business projects, in order to increase the experience of young people in generating technological and social entrepreneurship.<sup>60</sup> To achieve this objective, the project Digital First offers trainings in marketing, communication, design and coding, providing tools to acquire the digital skills most in demand by the market through the implementation of an Academy created in collaboration with Fastweb (Italian telecommunication company). Finally, the implementation of the Cariplo Factory can be considered as a demonstration of how education has moved from being a rather marginal area of investment with focus on private institutions, to become a central node with unprecedented capacity to attract funding from investors in the private equity and venture capital sectors (Ball, Junemann & Santori, 2017).

#### **9.4.4 The digital education network of the Cariplo World**

The multitude of connections between the Fondazione Cariplo and several Italian and foreign organizations, built through the creation of the benefit company Cariplo Factory, defines thematic clusters of activities. In fact, as underlined by the head of international relations of the foundation:

“Fondazione Cariplo works basically on four areas of intervention: scientific research, art and culture, environment and services for people. One of the most interesting activities, from the point of view of the topics addressed, [...] is that relating to thematic networks. So, even if we are all members of the European Foundation Centre, then every foundation can decide to join more restricted networks, for example about the topic of environment, food, etc.” (Interview, Fondazione Cariplo, 2019).

As regards connections with other organizations, these can be distinguished between relations with public or private actors, at the national or European level. Furthermore, as displayed in Figure 9.5, most of the actors composing the “Cariplo World” are from the private sector: Kessler Foundation, Gulbenkian Foundation, Barilla, Carrefour, etc. At the Italian level, the Fondazione Cariplo is connected to organizations that put in place the project design through activities of data collection, data treatment, data research and evaluation of impact. As seen in the previous paragraph, these organizations are also

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<sup>60</sup> <https://www.cariplofactory.it/education/>



from the academic sector, for example the Polytechnic and the Catholic University of Milan. Moreover, as explained by the head of international relations of the Fondazione Cariplo:

“In the end, those who have to do the concrete work are the organizations that have networks and put in place their project design.” (Interview, Fondazione Cariplo, 2020).

Whereas, concerning public actors, in the field of education, the interviewee stressed the importance of having the public administration as a partner. As mentioned:

“If you need to deepen a field, a partner in some projects is the public administration necessarily. It can be the municipality of Milan, the region, the ministry. You will never succeed in doing something in a public school if you don't have also the approval of the public administration. For example, we have done environmental education. We have introduced projects in the theatre field, extra-curricular activities that have made it possible to reduce the school dropout a lot. So, we have schools from the suburbs in which, from the point of view of this social problem, there were effectively some criticalities. It has been shown that adding this kind of activities to the school-curriculum was beneficial in reducing the phenomenon. This testing has also been accepted by schools, which need financial resources to implement it. During the model testing period, the schools were financed by the Fondazione Cariplo.”

Regarding the relations with Italian policy-makers, the head of international relations goes on arguing that the foundation is able to provide successful models to solve social problems that should be the responsibility of the public decision-making:

“The other thing is that we intervene on themes that, in the case you can succeed, in some ways this means for us to demonstrate to public administration or to policy-makers more in general that this model which we have tested can work. But, after the project closure, it is the government that must move forward. This often happens with schools. If we demonstrate that a project in schools about the topics of inter-culture, integration of migrants, cultural integration, revision of school curricula, has been successful, it becomes clear that the foundation cannot sustain this project forever, because the education field is an area of competence of the public decision-making. It's the turn of policy-makers to say that this the model which has been experimented by private funds has demonstrated to bring benefits. So, we keep this model as ours and we use this school curriculum as default, to give you an example. Sometimes our interlocutor is the public decision-making at the national level.” (Interview, Fondazione Cariplo, 2020)

Finally, through the Cariplo Factory's connections to private and public actors at the national and international level, Fondazione Cariplo is able to involve in its digital education network actors specialized in social investment strategies in venture capital (Indaco Venture Partners SGR), Ed-Tech (Microsoft and Cisco), technology and business strategies (Accenture). As shown in the following map, thanks to the partnerships established by the benefit company Cariplo Factory, the Fondazione Cariplo

is positioned at the intersection of the philanthropic, business and public sectors. Indeed, the mission budget for the year 2022 of the Fondazione Cariplo states:

“Cariplo Factory, an instrumental company of the Fondazione Cariplo, was established in 2016 and carries out activities aimed at improving the conditions of young people and employees who may find themselves in conditions of fragility on the labour market, strengthening employment opportunities. Cariplo Factory, in carrying out its mission, pays particular attention to the phenomenon of the so-called Digital Transformation which is causing profound changes in the world of job and required skills. Furthermore, Cariplo Factory carries out projects in partnership with institutional and corporate actors, promotes open innovation initiatives and provides activities of consultancy, encouraging the creation of a modern and dynamic ecosystem between large and small realities that is able to generate a positive impact on the reference communities. The Fondazione Cariplo appoints all the members of the Cariplo Factory bodies and maintains ongoing collaborative relationships with them.” (Fondazione Cariplo, 2022b, p. 25).



### 9.4.5 The Cariplo World connecting new philanthropic organizations to create value

As declared by the deputy director of the Art and Culture area of the Fondazione Cariplo, in order to multiply the effects of the funds owned by the foundation, an important activity is participating in partnerships with institutions or other foundations:

“[...] what we usually do is establishing partnerships with other subjects that are similar to us or not necessarily similar to us, that share our goals so to have a major critical mass and more resources for a specific initiative, adding to our funds the ones of the other institutions. We do that with the public institutions. I think with the Lombardy Region and with other foundations like ours in Italy and abroad. This is not a real fundraising, but it's a matching grant.” (Interview, Fondazione Cariplo, 2019).

It is therefore possible to identify different levels of resources mobilized by the Fondazione Cariplo: the resources collected independently by the organizations to cover the costs of the projects; those that the foundation activates with other partners; the resources it collects from third parties to finance its projects; funds that contribute to the philanthropic mission in the form of impact investments.

**Table 9.18 Levels of resources mobilized by the Fondazione Cariplo (2021)**

Levels of resources	Contributions
<b>Foundation's contribution</b>	€126,666,515 Contributions approved by the foundation to beneficiary organizations
<b>Other resources collected to implement projects</b>	€120,319,687 Request for the beneficiaries to obtain resources from external donors
<b>Collaborations of the Fondazione Cariplo with community foundations and other organizations</b>	€20,000,000 Transferring of contributions to 16 community foundations every year, so that starting from an initial capital they can attract donations
<b>Fundraising</b>	Funds can come from public entities, private organizations, foundations and natural persons Fundraising conducted through meetings with potential donors and communication campaigns
<b>Impact investing</b>	Impact investing achieved through operations that make financial resources available at favorable conditions than the implementation of more sophisticated financial instruments

In 2021, the Fondazione Cariplo approved the disbursement of 941 grants for €126.666.515, including the amounts deliberated in previous years in the form of a provision and proposed again for the increase in project financing in 2021. Taking into account the portion of the budget used but revoked in the same year (€41,000), the net philanthropic volume amounts to €126,707,515. Moreover, these contributions were assigned through the use of sums identified as co-financing for €2,965,471, necessary for the implementation of the initiatives introduced in the following table.

**Table 9.19 Initiatives funded through co-financings**

<b>Grant instrument</b>	<b>Disbursement (€)</b>
<b>Programme QuBi</b>	800,000
<b>Project Funder35</b>	408,000
<b>Initiative Never Alone</b>	1,125,000
<b>Joint tender with the Lombardy Region in support of third sector entities</b>	500,000
<b>Other financial instruments</b>	32,471
<b>Total</b>	2,965,471

Source: Fondazione Cariplo, 2022b, p. 35.

Furthermore, the distribution among the various disbursement categories presents a significant share of tenders both in terms of number of contributions (53% compared to 67% in 2020) and in terms of approved amount (32% compared to 41% in 2020).

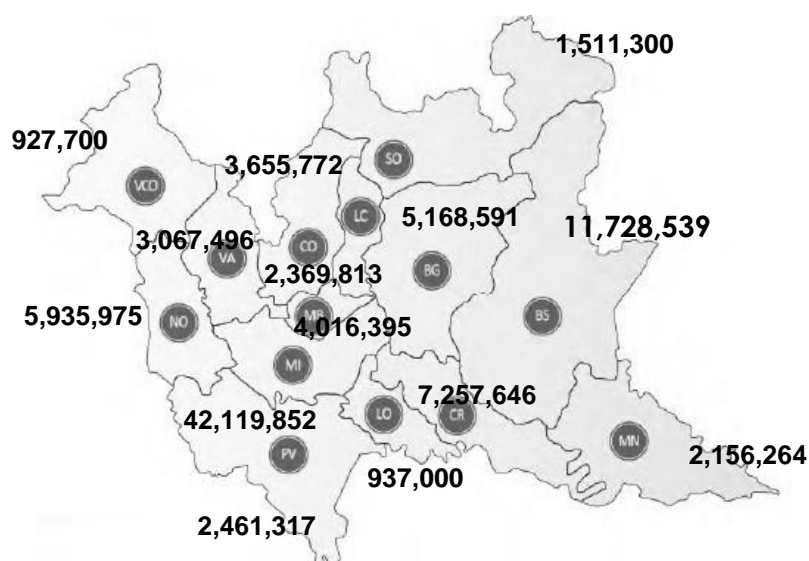
The allocation of contributions took place in line with what was defined by the Board of Directors in the Annual Forecast Programmatic Document and approved by the Central Commission of Charity. For all approved loans, the foundation made use of the resources assigned to the specific disbursement instruments (€68,262,989), implemented during the year by withdrawals, funds already set aside and tax credits, for a total amount of €58,403,526. The breakdown of the total amount of contributions (€126,666,515) is shown in Table 9.20.

**Table 9.20 Distribution of the total contributions (2021)**

Granting instrument	2021		2020	
	n.	Mln €	n.	Mln €
<b>Tenders</b>	503	40.24	932	57.49
<b>Projects</b>	38	938	46	10,93
<b>Other financial instruments within the philanthropic areas</b>	10	17.55	103	25.26
<b>Project Community Foundation</b>	16	1.44	28	0.99
<b>Institutional grants</b>	17	12.41	16	12.19
<b>Actions consistent with the strategic objectives</b>	32	1.59	32	1.95
<b>Research and disbursement assessment</b>	0	0.00	4	0.10
<b>Disbursements to community foundations</b>	17	19.57	16	19.55
<b>Extra-tender disbursement</b>	9	7.12	0	0.00
<b>Emblematic disbursements</b>	17	15.00	8	10.00
<b>Emblematic provincial disbursements</b>	16	1.30	21	2.14
<b>Patronage</b>	200	1.06	189	0.97
<b>Total</b>	956	126.67	1.395	141.58

Source: Fondazione Cariplo, 2022b, p. 35

Figure 9.9 Map of interventions in the Lombardy region in 2021



Source, Fondazione Cariplo, 2021, p. 34.

Table 9.21 Geographical distribution of interventions (2021)

Areas of intervention	n.	Disbursements
Bergamo	52	5,168,591
Brescia	74	11,728,539
Como	48	3,655,772
Cremona	29	7,257,646
Lecco	25	2,369,813
Lodi	12	937,000
Milano	20	42,119,852
Monza and Brianza	416	4,016,395
Mantova	29	2,156,264
Pavia	22	2,461,317
Sondrio	14	1,511,300
Varese	40	3,067,496
Novara	19	5,935,975
Verbano-Cuso-Ossola	11	927,700
Piedmont	71	1,268,525
Other areas	20	6,928,058
Abroad	13	851,000
Other initiatives of the foundation	41	24.305.272,71
<b>Total</b>	<b>956</b>	<b>126,666,515.38</b>

Source: Fondazione Cariplo, 2022b, p. 172

## 9.5 Conclusion

In this chapter, I have analyzed the new philanthropic organizations targeting social investment in European digital education networks through the construction of graphs. Moreover, in order to investigate the first objective and hypothesis of the research, I presented different maps of Italian emerging actors and highlighted the relationships between these new philanthropic organizations through a comparative examination focused on topological dimensions and data analysis clusters.

With the aim of mapping the digital education networks in which new philanthropists are involved to carry out social investment strategies in European digital education, I examined the ethnographic material collected through the interviews conducted from 2018 to 2022 and on the websites of the new philanthropic organizations studied. Later, I related the information that the respondents provided in the interviews, regarding the connections of the new philanthropic organizations with public and private actors at the national and European level, to understand which the main nodes inside these European digital education networks are, the boundary actors and the marginal ones.

Data revealed the building of thematic communities inside the network of new philanthropic actors in digital education governance and structured strategies of social investment carried out by these organizations. Indeed, it has been shown how strongly connected foundations develop large-scale digital education projects through impact investments focused on “interesting” business models. Whereas more isolated actors in the network, such as associations and cooperatives, generally adopt educational technologies to carry out distance teaching and learning activities. In particular, the use of digital technologies in education by these organizations has increased since the outbreak of the pandemic crisis.

After having explored the dynamics of social investment in European digital education networks, I focused on the first hypothesis of the research, relating to the possibility for new philanthropic actors to promote social investment strategies through the digital education networks in which they are involved. As explained in the first paragraph, the hypothesis is confirmed, to mean that the actors studied mobilize their financial resources and usually apply to calls for grants thanks to the partnerships they have established with public and private organizations, in particular at the national level.

This is in line with new philanthropy research (Ball, 2007) which sees the re-articulation of the relations between the philanthropic, private and public sector as very evident in recent education policy. This re-articulation involves different forms of partnership in the management of economic and social relations. Finally, the investigation of the network structures of investors is also essential to understand the funding implications for digital education companies and the role of digital actors in the education market, characterized by the recent centrality of investment ventures, private equity stakeholders, funds, etc. These considerations raise the second objective of the thesis, that is related to how new philanthropic organizations mobilize their financial resources to advocate for education. The second objective and hypothesis of the research are introduced in the next chapter.



## Chapter 10

### Advocacy strategies in European education governance

This chapter explores the second objective of the research, that is investigating how new philanthropic organizations mobilize their financial resources to advocate for education. In order to analyze this second objective, I focus on social inclusion as a central theme of the advocacy strategies and that emerged in the interviews with the employees of philanthropic organizations. Therefore, the second hypothesis of the thesis relating to this objective is: new philanthropic actors give voice to a wide range of advocacy groups for social inclusion in education by mobilizing their resources. Moreover, the focus of the second hypothesis is on the “funding” component of the relationship between education market and society. The sections also illustrate the four education advocacy strategies that were introduced in the second part of the thesis in chapters 5, 6 and 7 and contextualized in the light of the Europeanization of education policies. As noted previously, the four strategies are: redefining childhood education, improving quality in the educational system, pursuing educational change and empowering students in digital skills.

The chapter analyzes such advocacy strategies using network ethnography focused on an Italian fieldwork. In view of this general focus an account of the education advocacy operations is presented which describes different activities in terms of pursuing social inclusion, quality in education, educational change and empowerment in digital skills. Therefore, the chapter will turn attention to the dynamics of education advocacy in a single case study drawn from the ethnographic material that contributed to the empirical basis of this thesis.

The structure of this chapter is as follows: the first paragraph coins the results of the study to some general literature concerning the current evolution of the education advocacy strategies and underline some dynamics regarding the funding for advocacy; in the second paragraph, I shift the focus to the advocacy strategies that the new philanthropic organizations adopt to pursue social inclusion in education (redefining childhood education, improving quality in the educational system, pursuing educational change and empowering students in digital skills); the following paragraph describes an Italian education advocacy network based on the data collected through the interviews with the employees of the new philanthropic organizations and highlights the web of social, political and business relationships that combine finance capital with philanthropy, think-tanks and politicians inside this network; in the last paragraph, I introduce the case study *Passo dopo Passo...Insieme*, a voluntary organization based in the province of Milan that advocates for social inclusion in education by offering training courses to parents, students and teachers and by implementing an after-school service in oratories that includes middle schools pupils with academic difficulties.

## **10.1 Discussion on advocacy strategies in European education governance**

In this paragraph, I provide a discussion of advocacy strategies in order to explore the second objective of the thesis, which is to investigate how new philanthropic organizations mobilize their financial resources to advocate for education. Accordingly, I examine the second hypothesis of the study, which concerns the possibility for new philanthropic actors to give a voice to a wide range of advocacy groups for social inclusion in education by mobilizing their resources.

Hence, in the following sections, the presentation of the findings is combined with theoretical explanations of how new philanthropic organizations are able to advocate for education and to participate in heterarchical networks involving politicians, business groups and philanthropists.

### **10.1.1 Education advocacy strategies of Italian new philanthropic organizations**

As outlined in the introduction to this chapter, I focus on four advocacy strategies aiming to pursue social inclusion in education (caring for childhood, promoting quality in education, pursuing educational change and empowering students in digital skills) that are taking place in the context of the reworking of the state, market and philanthropy. Nowadays, in fact, “philanthropies of various kinds are taking on the moral responsibilities of the state articulated within a complex global architecture of economic and social relations.” (Avelar and Ball, 2017). Thus, contributing to policy-making, or doing what new philanthropists often refer to as advocacy is becoming not only part of philanthropy’s activities, but a central goal. Indeed, influential foundations increasingly describe advocacy as a crucial part of their activity and often mention it as a distinctive trait of their work in contrast to former ways of “giving”. Moreover, in spite of being non-profit, the work of new philanthropy in education policy furthers the blurring between public and private, and between non-profit and for-profit. This is a challenging network of power, influence, ideas and money, which presents a simple message easily understood by politicians and policymakers in diverse locations (Avelar, 2018).

Therefore, philanthropies are integrated into educational policy networks and are encouraged to work with government or agencies or partnerships of various kinds in an effort to solve “wicked” social and educational problems. Hence, participation in these policy networks structures and enables the circulation of new policy ideas, moving towards an interactive and multi-dimensional form of policy-making involving the participation of a new mix of state and non-state actors (Ball & Juneamann, 2012). In fact, as mentioned by the contributor and spokesman of the think tank *Alleanza per l’Infanzia*:

“[...] we have given ourselves a discussion arena that was first in presence, then became online, in which there are individual issues that interest someone and around which we discuss. Then, we process the documents and make proposals. We have written documents on the universal single income. It is a document that has taken a long time, and on which we have worked in about fifty people between associations and scholars. It is the proposal of an integrated package of interventions for children aged 0-6 years. So, both in

nurseries and kindergartens. We have produced a very detailed document, both on the analysis of the situation and on the policy proposals. And now, of course, we will continue with this series of documents. We have been asked for a memorandum. We should have a hearing in the Senate on the Recovery Plan regarding childhood. They asked us for specific feedback on this and we are preparing in the coming days the protocol to be presented to the Senate for discussion. We are continuing to work on this theme, always from an interdisciplinary perspective.” (Interview, Alleanza per l’Infanzia, 2021).

Finally, in order to pursue social inclusion in education, the new philanthropic actors take on moral responsibilities to be addressed to political decision-makers by promoting the circulation of political ideas. At the same time, they play the role of innovators in promoting new solutions to the problems of state education by fostering the blurring between the public and private sectors.

### **10.1.2 Heterarchies in Italian education advocacy networks**

The participation of new philanthropic actors in education decision-making is best understood when conceived as collaboration with policy-makers within heterarchies. In fact, as mentioned by the respondent of the think tank Alleanza per l’Infanzia:

“We move nationally. For now, the alliance is moving above all with respect to the arena of national politics.” (Interview, Alleanza per l’Infanzia, 2021)

Hence, as stated by the head of programmes of the foundation Nesta Italia, discussing with the political parties is an important action to take in order to change the narrative and make people heard in the policy-making arena. As she affirms:

“The confrontation with political parties is a fundamental action to be taken to change the narrative and make people heard about important issues. [...] There are political parties and situations that you have to be good at managing. And you also need to be good at arguing with them. So, you have to play a role in changing a certain type of narrative. One of our projects aims to do this. It’s called the Collective Lab and creates a space for people’s voices to be heard on some important and burning issues.” (Interview, Nesta Italia, 2019)

A newly emerging set of policy relationships between the state, philanthropy, think tanks and companies are increasingly complex and favour the development of heterarchical structures within which philanthropy and business are tightly intertwined. A variety of direct and indirect, commercial, financial and ideological interests are now able to “voice” their concerns in contexts of policy influence and in contexts of practice. Set over and against the “failure” of the state to provide schooling for all children and the poor quality of many state schools, this is beginning to change the landscape of state schooling, bringing an increasing number of private providers and creating opportunities for business in all sectors of education (Ball, 2010).

Additionally, regarding the voicing of the new philanthropic concerns in the education context of practice, the coordinator of the projects of motivation to study and promotion of volunteering of Passo dopo Passo...Insieme argues:

"Collaborations can come, for example, from the Breda Institute, more than from the Calvino Institute, or from the Einaudi Institute, from which over the years we have welcomed such a residual number of young students, but, in any case, there has also been a collaboration. Most of my pupils are from Don Milani. About ten are from the Santa Caterina Institute, which is the parish where we have an office and, let's say, the first after-school, where it all started. There are two units, two students, a girl from Italo Calvino and a high school student from Einaudi. And these are all external requests, that is, not sought by us, but perhaps through word of mouth. Also, because, however, we do not advertise, in the sense that we concentrate much on word of mouth also for what the enrollments are." (Interview, Passo dopo Passo...Insieme, 2021).

Furthermore, regarding the ideological interests to be given a voice in the context of political influence, the president and principal of the Big Picture Learning school explains:

"This is the problem of the Italian system, in which to be successful you need to have friends, or as I say in a provocative way, cousins. We, on the other hand, have always avoided this a bit. Partly because we don't like it, partly because it then becomes an element of blackmail." (Interview, Big Picture Learning, 2021).

At the European level, ideological interests are expressed in the context of political influence as confirmed by the contributor and spokesman of the think tank Alleanza per l'Infanzia:

"The last document I was telling you, which concerns an investment proposal on early childhood services, we made a part of the document in English. Because it is an important document at the level of the European debate. We have seen that there were other subjects who have begun to know us at the European level, who are interested. [...] However, we are at an early stage. [...] In some cases, they are European, Italian and foreign parliamentarians. In other cases, they are organizations like ours. Within our network there are organizations that have a national branch in Italy but are international. Think Save, think UNICEF and so on. Some of the associations that are part of the Alleanza in Italy are part of more general movements. And, therefore, what we do with the Alleanza begins to interest. At least, the same organizations, but in other countries." (Interview, Alleanza per l'Infanzia, 2021).

The introduction of commercial and ideological interest in the contexts of European influence and practice is also cited by the president of the European Digital Learning Network association, who states:

"Basically, contacts with institutions are built following specific trends that interest us very much, namely those of the so-called policies. So, all the innovation that the European Union will implement in a few years in the field of education. The European institutions have open dossiers, in which, at a certain point in the legislative project, there is a consultation with

the European stakeholders in a specific sector. We, then, collaborate in formal or informal working groups within the Commission to bring our technical advice and guidance on a range of issues. This is a first level approach. Subsequently, as far as the network is concerned, we participate in conferences and seminars, sometimes as listeners, sometimes as speakers, getting in touch with the officials of the European Commission, starting to share professional approaches and opinions. Later it usually happens that they call you because they need advice on a series of questions. This is the way to get in touch with institutions, after all. In other words, working with them and answering their questions, their needs for technical advice.” (Interview, European Digital Learning Network, 2019).

In summary, the education advocacy strategies introduced in the European contexts of influence and practice define networks as a basis for considering new philanthropists as “members of the heterarchy”. Indeed, “to understand new philanthropy’s work in education policy-making we must see its activity not as “outsiders” aiming to convince state policymakers, but rather as active members of a network of governance, or the heterarchical state” (Avelar, 2018, p. 2).

**Table 10.1 Heterarchical advocacy strategies for participating in policy-making in education**

<b>Heterarchical advocacy strategies for participating in policy-making in education</b>	<b>Types of activities</b>
<b>Managing political parties and situations</b>	Changing the narrative on education by arguing with political parties to make students, parents and teachers heard
<b>Asking the media if they are interested in a specific initiative</b>	Maintaining contact with newspapers interested in a specific education advocacy initiative
<b>Collaborating with public schools</b>	Welcoming students who are unable to succeed in their academic career and increasing enrollments through word of mouth
<b>Submitting calls for grants with partners</b>	Getting involved in networks that are built to pass the calls for grants and their complex reporting phase
<b>Participating into networks with European and international organizations</b>	Participating in consultations, hearings and working groups on open dossiers on education with European Commission officials requesting technical opinions and advice

As can be seen in Table 10.1, various activities related to Italian education advocacy are carried out by new philanthropic organizations in heterarchical networks involving political parties, media, public schools and partners, and are implemented in the occasion of calls for grants or requests from the

officials of the European Commission for technical opinions. These heterarchical networks are able to introduce new “voices” within the narrative in education through consultations, hearings and participation in working groups to represent the educational needs of different groups or communities.

### **10.1.3 Investigating advocacy strategies in education governance**

This chapter will explore how new philanthropic organizations mobilize their financial resources to advocate for education. Furthermore, in order to confirm or reject the second hypothesis of the research related to this objective, investigating the possibility for new philanthropic organizations to give voice to advocacy groups for social inclusion in education by mobilizing their resources, an empirical analysis focused on the Italian case study *Passo dopo Passo...Insieme* will be illustrated. However, the network dynamics related to this new philanthropic organization will be introduced together with the main private and public actors with which it interacts in order to promote social inclusion in education. Among these partners there are students, families, teachers, principals, priests, members of foundations, municipalities, social services, etc.

Moreover, the focus of the second research objective is on the resources mobilized by new philanthropic organizations to implement their advocacy strategies in education. To this end, the *Passo dopo Passo...Insieme* balance sheet as of 31 August 2021 will be presented in the fourth paragraph of the chapter, highlighting the origin of the resources used by the organization to carry out the training activities. As will be shown, in the 2020-2021 year budget, most of the revenue comes from private financiers, such as individuals, foundations, private companies and members of the organization. However, these funds (€ 238,840.46) are not sufficient to finance all the educational activities provided by *Passo dopo Passo...Insieme*, and a deficit of €2,604.55 originated from the training offer. The main activities provided by the organization are, in fact, training courses for students, parents and companies, which aim at five different objectives related to social inclusion in education: looking at the problems of the students and not the students as a problem; including students who have difficulties in school and who do not; combining Christian values with professional skills; working in a network with the educational agencies of the territory; measuring the impact of the interventions in order to produce effective results.

Therefore, standing to these considerations relating to the mobilization of funds for the provision of educational initiatives aimed at students, parents and businesses, and the representation of the instances of these groups in a network that includes public authorities such as municipalities and social services, it is possible to affirm that the second hypothesis of the research is confirmed. However, it is also crucial to point out that in supporting social inclusion in education new philanthropic organizations are able to mobilize their own resources, provided by “larger” foundations or private companies, which means they are heavily dependent on grants and donations coming from third parties in the constitution of their assets.

Hence, not all new philanthropic organizations have solid connections with policy-makers to represent the educational needs of groups or communities. As regards the fieldwork of this thesis, at the European

level, only the Fondazione Cariplo and Nesta Italia foundations and the European Digital Learning Network association have contacts with the European Commission. While, at the Italian level, all the actors involved in the Italian education advocacy network have relations with the national public authorities. Furthermore, through contacts with other new philanthropic organizations, the “small” actors can be involved in European education advocacy networks, such as Passo dopo Passo...Insieme, which is in relation with the Fondazione Cariplo, which in turn is in contact with Europe Commission for the disbursement of contributions.

As explained by Ball, “in most education policy research money is rarely mentioned and is overwritten by a focus on ideas and practices. Even when subjected to the arcane mercies of the economics of education, issues of funding are dealt with as abstractions.” (Ball, 2012b, p. 23). However, as we can see in the empirical analysis provided in the following paragraphs, in the interface between education policy and neoliberalism money is everywhere predominant. Private equity and global education businesses are interested in profitable education enterprises. State schools built through Private Finance Initiative and Public-Private Partnership schemes are owned and run by banks, builders and management service companies and leased back to the state. There is also a dynamic market in private educational organizations which are being bought and sold and combined (Ball, 2012b). Furthermore, regarding the interaction with the business world, the coordinator of the projects of motivation to study and promotion of volunteering of the organization Passo dopo Passo...Insieme explains:

“[...] We try to adapt this type of skills, of competences also with commercial partners through training courses. But above all we are looking for partners to support our economic sustainability. I apologize for the pun, but surely families pay a fee which, however, is a quarter of what it should actually be. Therefore, a small part is paid by the families and, subsequently, the rest is sought with funds and with participation in projects, presenting the same to different foundations and institutions, which could finance us by finding our service interesting and, above all, useful.” (Interview, Passo dopo Passo...Insieme, 2021).

In this context, profit becomes a force for good. Money, as profit, is important in getting neoliberalism, as a doctrine and as a set of policy ideas, into the public and political imagination. That is, funding for advocacy, “research” and “influence” activities in making neoliberalism thinkable, possible and necessary. There are also intimate but often unapparent relationships between advocacy, philanthropy, social enterprise, business, academia and politics, joined up by key individuals (Ball, 2012b). This is confirmed by the vice coordinator of grants and initiatives of the social enterprise Con i Bambini, who affirms:

“Today we support around 430 projects from North to South and around 500 minors under 17 years old are actively involved. And over 6,500 organizations from all over Italy are involved. Therefore, we are certainly moving a large number of organizations and subjects that have been working for 4 years to date to solve this problem [educational poverty], a phenomenon that has never been addressed in a systemic way, but above all with such economic relevance.” (Interview, Con i Bambini, 2021).

The fundamental role of funding dynamics for education advocacy is also mentioned by the president of the association Amici di Peter Pan, who states that:

"The association regularly participates in funding calls, like other organizations." (Interview, Amici di Peter Pan, 2021)

Finally, as the respondents confirmed, new philanthropic organizations mobilize the financial resources obtained through grants and donations to address issues related to the gaps in Italian education. Furthermore, the aims of these actors to solve the problems linked to social exclusion originating from conditions of educational poverty place them at the intersection of philanthropy, business, academia and politics, thus inserting neoliberalism activities within the policy-making in education.

#### **10.1.4 Limitations and future research directions**

There are wider aspects of power in education policy context that I could not address for space reasons. I could not develop my analysis in that direction, rather I consider it as a necessary development of my future research. An important aspect to investigate is, in fact, represented by power dynamics concerned with both the new philanthropic organizations and the policy-makers who project education policies. Moreover, according to Ball (2012, p. 25), in the educational systems "money is power in a number of ways: the power to get things done - build schools, start up programmes, pay for bursaries and the power to "partner" with governments in solving social problems and the power to speak and enact policy, sometimes over and against the wishes of governments, in local and transnational arenas."

Future research guidelines could also investigate the dynamics of early childhood education and care such as the related issues of the cost of access to nursery schools and kindergartens, the implementation of policies for the work-life balance of parents and the offer of training to parents to understand how to educate their children to bring about a positive change in society were presented as fundamental by some of the interviewees. These issues could be deepened within the framework of the existing reference policies at the international and European level, such as the Convention on the Rights of the Child of the World Health Organization (WHO) and the United Nations International Children's Emergency Fund (UNICEF) on "Nurturing care for early childhood development" and the European Pillar of Social Rights<sup>61</sup> of 2017, in particular the points 9 on childcare and 11 on work-life balance.

### **10.2 Education advocacy strategies for social inclusion**

In this second paragraph, I introduce a focus on the advocacy strategies that new philanthropic organizations adopt to achieve social inclusion in education, which have been already explored in the

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<sup>61</sup> The European Pillar of Social Rights sets out 20 key principles and rights essential for fair and well-functioning labour markets and social protection systems.



second part of this thesis (see chapters 5, 6 and 7) and accompanied by the presentation of the policy-scape in which they are carried out.

The first strategy is linked to the redefinition of childhood education. The second concerns the commitment of new philanthropic organizations to improve the quality of the educational system. Furthermore, advocacy activities related to promoting educational change in education are presented. Finally, the fourth education advocacy strategy introduced is the empowerment of students in digital skills, intended as the growth of the personal potential associated with particular competences, such as those correlated to the digitalization.

### 10.2.1 Advocacy strategies to redefine childhood education

In pursuing social inclusion in education, as mentioned by the contributor and spokesman of the think tank *Alleanza per l'Infanzia* the *protection of childhood* is a fundamental activity. As part of the education advocacy strategy to redefine childhood education, some of the main actions carried out by the new philanthropic organizations are:

“[...] strengthening of services for parental families, in the 0-6 years old range; strengthening of the nurseries and kindergartens [...] That is: a part of the country does not have full time. Therefore, full-time reinforcement where there is none.” (Interview, *Alleanza per l'Infanzia*, 2021).

Moreover, an important role played by the new philanthropic organizations in Italian education advocacy deals with the *support to parents*. Thus, networking with parents is fundamental in order to promote social inclusion in education, as explained by the supervisor of the educational and training activities of the voluntary organization *Passo dopo Passo...Insieme*:

“Two or three times a year the coordinator holds the meeting with both teachers and parents. Therefore, we raise the awareness among families with training sessions. Now everything is a little frozen for the Covid. But, generally, every year we hold trainings on different themes. Within the association, in fact, there is this desk that was created for parents about ten years ago. Nowadays, it is open to everyone. [...] the more people you work with, the easier it is to have results. So, if I have the opportunity to see a young student, and I can also see the parents, or even just one of the two, then the work also has a benefit. [...] And of course, also the principals. With the principals we make a summary of the work carried out during the year. So, there is a lot of networking, both with families and schools.” (Interview, *Passo dopo Passo...Insieme*, 2021).

The importance of the support to parents is also underlined by the president of the association *Amici di Peter Pan* who argues that the work with the parents is the basis of a successful work with their children:

"[...] there is always support for parents, because working with children goes hand in hand with working with parents. Otherwise, it is not possible to act, the action has no value."  
(Interview, Amici di Peter Pan, 2021)

Hence, the NGO Ashoka Italia works with parents to help them understand *how to educate their children to changemaking*, in the sense that it is important for students not only to be able to read and write, but also to be empathetic and take care of other people. As confirmed by the youth years programme manager:

"One of the drivers to work on so that everyone is a "changemaker" is helping parents to understand that there is more and more the need to educate their kids to changemaking. It is good to help them being able to read and write, but they must also help them being empathic, caring for other people's needs, be flexible, able to work with others." (Interview, Ashoka Italia, 2020).

Furthermore, *the cost of childhood education* in Italy is presented as excessive by the contributor and spokesman of Alleanza per l'Infanzia, who stresses that access to nurseries reproduces barriers on a territorial and family basis. Also, enrollment in nurseries for children may depend on the level of education and income of the parents:

"There is no true expansion of early childhood services. There is no relevant reversal. There is no lowering of fees for parents. And expecting that a single-income family can afford a nursery, with the fees that are paid in many municipalities, is, frankly, nonsense. That is why we propose not only to increase coverage, but also to lower costs. For us the services must be made free. That is, just as you don't pay for elementary school, then you don't even have to pay for nurseries and kindergartens. So, to have a much wider and free public offering. Because, otherwise, we end up creating barriers to access. In Italy there are barriers that go not only on a territorial basis, but also on the characteristics of the family. A child's chances of being in a nursery grow on the base of the level of education and income of the parents. Therefore, we are creating inequalities in early childhood also in access to the nursery." (Interview, Alleanza per l'Infanzia, 2021).

**Table 10.2 Advocacy strategies to redefine childhood education**

<b>Strategies of education advocacy for redefining childhood education</b>	<b>Types of activities</b>
<b>Improving services for childhood</b>	Strengthening nurseries and kindergartens services and reduce enrollment costs
<b>Networking with schools</b>	Meeting the principals to summarize the work done with the students during the academic year
<b>Providing training courses for parents</b>	Raising awareness through training courses and consultations and help parents understand the need to educate their children for changemaking
<b>Reducing the costs of education</b>	Promoting free nurseries and eliminating the territorial and income barriers to access linked to the characteristics of the family

In summary, early childhood education advocacy in Italy is strongly needed to ensure access to nurseries and kindergartens regardless of parental income and education level. At the same time, the awareness of parents towards educating their children to care for others and the redefinition of the idea of the growth experiences are pursued by the new philanthropic organizations through trainings. Finally, reducing the costs of accessing nurseries and kindergartens and expanding their offer are important measures that could allow children to benefit from public childhood education.

### **Box 10.1 Alleanza per l'Infanzia advocating for childhood education**

Alleanza per l'Infanzia is a national network of organizations and associations committed in the promotion and protection of children and their parents' rights, and who share the responsibility to raise awareness and put pressure on policy-makers, to carry out reforms, and support businesses and local communities to build more friendly environments for children, teenagers and families. It is composed of national organizations, associations and scholars with specific skills and experiences in the field of education, child development and family policies.

Alleanza per l'Infanzia pursues the following objectives:

- promote, through analysis and research activities, the adoption of national policies that make it possible to find effective and lasting solutions to ensure the full development of children and adolescents;
- implement advocacy actions towards the government, parliament and citizens;
- realize public initiatives (seminars, conventions, press conferences, etc.) and disseminate them through its own communication channels. To this end, it is part of the Alliance's activities to organize regular meetings between members, aimed at mutual updating and coordination, preparing documents and ensuring the effectiveness of the actions taken.

Moreover, on 20 December 2019, Alleanza per l'Infanzia implemented a charter of understanding, which considers three majority priority areas of intervention:

- economic support: create a unitary system of monetary transfers to families with children along the entire growth path through the establishment of a single universal allowance;
- socio-educational system: expand the offer of socio-educational services for early childhood and parenting support, making them universal, through the quantitative increase in the offer of public and private services and the protection of those who work and are engaged in educational services;
- leave system: strengthen the systems of maternity, paternity and parental leave, making them accessible to all types of male and female workers regardless of their history of contributions and the type of employment contract, and guaranteeing adequate remuneration and duration.

Source: <https://www.alleanzainfanzia.it/carta-d-intesa-dellalleanza-per-linfanzia/>

### **10.2.2 Advocacy strategies to improve the quality of the educational system**

The pursuit of social inclusion in education is carried out by the new philanthropic organizations through various types of initiatives put in place in order to favour an increase in the quality level of the training

offer. As seen in the previous section, training courses can be used to raise awareness of particular issues. In addition, these trainings are provided to students *to reinforce their knowledge on specific topics*. As mentioned by the vice president and educational activities coordinator of Passo dopo Passo...Insieme:

“Today there is a need for skills. [...] And, therefore, what we would like to do is to give tools in a theoretical, basic way, with which to look at reality, but above all, to give practical working tools. I often see educators who do not know how to use a computer, or how to work towards objectives. I would like to transfer the skills that I have learned both in the for-profit world, and also in the non-profit world, by providing an annual course for these people.” (Interview, Passo dopo Passo...Insieme, 2021).

Hence, as stated by the coordinator of the projects of motivation to study and promotion of volunteering of Passo dopo Passo...Insieme, training courses can be used *to motivate students towards further goals*, such as self-organization, autonomy and teamwork:

“”Motivati ad apprendere” [Motivated to learn] is a path characterized by a limited number of meetings and in which a workshop dimension prevails. The activities are based on three objectives: organization, autonomy and teamwork.” (Interview, Passo dopo Passo...Insieme, 2021).

The training offer is also created in collaboration with teachers, as stated by the head of the educational area of the Fondazione Pirelli:

“Depending on the age of students and the interest of each class, it is possible to concentrate on a specific focus, selected by the teacher among the ones proposed during the year. [...] The activities follow different modalities: usually, there’s a first introductory step that links the students to the preferred topic, through the consultation of documents and historical material and the use of digital instruments. In a second step, it’s possible to participate to laboratories to strength the knowledge about the topic or visit the most important workplaces and research places of Pirelli, both in the area Bicocca of Milan and in the technological hub of Settimo Torinese.” (Interview, Fondazione Pirelli, 2019).

Furthermore, the dropout rate is a criterion for identifying schools that need the support of new philanthropic organizations to improve the quality of their educational offer. As confirmed by the president of Teach for Italy:

“We do a detailed mapping. First at the provincial level and then at the regional level. We have 11 criteria: 6 are structured criteria of the European Union; the other 5 are criteria we have co-designed with other Teach for All organizations around the world. And, therefore, we have these 11 criteria that we follow in the selection of schools, which are half socio-economic criteria of the neighborhood, of the socio-economic context in which the school is located. So: income levels, unemployment levels, unemployment rate. For the rest, educational outcome criteria. Therefore, the percentage of school dropouts, failures, the percentage of children who, once they have completed their studies at that school, continue

with their studies and enroll in university. So, we do a mix of these two and figure out, by mixing these criteria and putting them together, which schools are most in need of support.” (Interview, Teach for Italy, 2021)

Concerning educational poverty and social exclusion, to counter the related risks, new philanthropic organizations promote internships to guide students in the world of work. In fact, as mentioned by the president of the association Amici di Peter Pan:

“Since 2014, all projects were aimed above all at the orientation and training of students in educational poverty and risk of social exclusion, and socio-economic poverty. Our students are not the last of the last, in the sense that they are not the irrecoverable ones in quotation marks, but they need a chance. Due to socio-economic conditions or family discomfort, they are unable to access those places where normally they would be entitled to it due to characteristics and talents. So, we take them in schools and we try to make them work through the internship formula. We collaborate with several Neapolitan schools, especially those in the suburbs. But we have also opened up to other collaborations, as high schools asked for it. In the most difficult schools, such as the Galiani in Naples, we also have, as far as I know, the only youth center that exists within a Neapolitan high school. And we do a lot of activities with the young people, especially promoting active citizenship.” (Interview, Amici di Peter Pan, 2021).

Furthermore, to ensure a better educational experience for students, the new philanthropic organizations adopt various initiatives, such as the provision of an advisor who has the task of personally following the students. As the president and principal of the Big Picture Learning school states:

“The advisors are the central element, the one that makes the difference. They are educators who take care of a maximum of 15 students. They take care of both their learning plan and their human growth and are a point of reference: from the coach to the priest, there have always been these figures for which adolescents break away from the family and take them as reference figures. The advisors take care of the study method, carrying out interviews with the families. The big difference from the state school is that, as the teachers come and go, the advisors see the whole class again and again, always. Everything passes through them. They are also the teachers' control room. Whatever the problem, students should refer to the advisors. When the advisors say no, they come to me. I send them back to them, because they make all the decisions.” (Interview, Big Picture Learning, 2021).

To increase the quality of teaching, the NGO Teach for Italy aims to convince the best Italian students or graduates to enter the Italian educational ecosystem by becoming school managers, provincial and regional directors of the Ministry of Education or employees of foundations dealing with inequalities among students. In fact, as mentioned by the president of Teach for Italy:

"This is our international mission all over the world. We want to make sure that there is an increase in the quality and level of teaching, of the profiles that choose teaching

internationally. This is something we want to see in all OECD countries and in all high-income countries. The function of the teacher has collapsed in recent decades. Because, it is paid little. Therefore, we want to convince those who study in the best Italian university contexts and that when they leave the university they can go to work with Google, Microsoft, Facebook and who can find a job place in the private sector and have a high level of personal and professional leadership, to enter the school, because we want these talents to stay in what we call "Italian educational ecosystem" in the next 20 years, becoming future school managers, future provincial and regional directors of the Ministry or working in various foundations dealing with inequalities in education. Because we essentially want to inject a number of new talents, with somewhat different jobs, into this system." (Interview, Teach for Italy, 2021).

**Table 10.3 Advocacy strategies to improve the quality of the educational system**

<b>Advocacy strategies to improve the quality of the educational system</b>	<b>Types of activities</b>
<b>Providing trainings for students</b>	Resolving the need for skills through theoretical and practical work tools and encourage the learning of autonomy, organization and teamwork
<b>Fighting school dropout</b>	Training students at risk of social exclusion and make them work through the internship formula
<b>Identifying the disadvantaged schools in need of support</b>	Mapping the schools on the base of the socio-economic level of the neighborhood and educational outcome criteria (percentage of school dropouts, failures and enrollments in university)
<b>Including students with special educational needs</b>	Following the students through advisors, who take care of both the students' learning plan and their human growth by paying attention to their study method
<b>Increasing in the quality of teaching</b>	Convincing those who study in the best university contexts and have high personal and professional leadership to teach and remain in the "Italian educational ecosystem"

As illustrated, the objective of guaranteeing a better quality of the Italian educational system is pursued by the new philanthropic organizations through numerous initiatives aimed at both students at risk of educational poverty and social exclusion and at their parents. These initiatives aim to offer practical tools to ensure the human and professional growth of students, such as training courses, internships and the support of advisors, who constantly follow the students in their personal growth and learning process.

### **Box 10.2 The project SI improving the quality of education in technological high schools**

The project SI - Scuola Impresa Famiglia (School Enterprise Family) was implemented in 2018 by Fondazione Cariplo as a strategic action in the field of school innovation to facilitate the transition of students from technical institutes to the world of work. Fondazione Cariplo intends to update the schools' laboratory equipment, by specific technical training for the teaching staff, in order to make the educational offer more consistent with the needs of manufacturing companies and the professional system.

The SI project has so far involved 76 technological high schools of the Lombardy region and the province of Verbano-Cusio-Ossola in Piedmont in the technological sector with specialization in: mechanics, energy, electronics, electrical engineering; IT and telecommunications.

Fondazione Cariplo, together with 36 leading companies and partners, was able to donate over 60 technological solutions and 5.000 hours of training for teaching staff for a total investment of €1.5 million.

Starting from the experience that the students have gained in the new updated laboratories, in May 2019 a competition was launched named SI Fabbrica. The purpose of the initiative is to strengthen collaboration between technical institutes, enhance the skills of teachers and offer students an opportunity for professional growth, through the creation of prototypes.

In 2021, in the framework of the project SI, Fondazione Cariplo has launched the call DIGITA.R.SI to support teachers of technological high schools in experimenting innovative methodologies in distance learning and laboratory activities. The initiative has also been joined by the Bracco Foundation which has supported the creation of digital products to enhance the potential of the STEM (Science, Technology, Engineering and Mathematics) disciplines in in the field of technical education, with specific attention to the gender perspective.

In order to provide training for students and improve the quality of teaching, as stated by the head of applied research and promotion of the human capital:

“Fondazione Cariplo’s research sector is involved in a program of valorization of the human capital and provides the donation of technology. The target is represented by the technical schools with industrial specialization. [...] we decided to invest in the donation of instrumentation that concerns industry 4.0, so anthropomorphous, industrial and collaborative robots, viewer for the virtual reality and three-dimensional printers and a substantial training, about 5,000 hours of training. We have tried to get more and more closer the world of education to the business system. We haven’t done that on our own, because we have been supported by the Polytechnic of Milan Foundation that is the performing partner [...] (Interview, Fondazione Cariplo, 2019)



### 10.2.3 Advocacy strategies to pursue educational change

The education advocacy actions implemented by the new philanthropic organizations are focused not only on improving the personal experience of each student, but also on a broader development of the Italian school system through a general *impact on students and the school system*. As mentioned by the principal of the Big Picture Learning school:

“Our didactic approach, didactic philosophy, is built on three fundamental elements: the relationship, that is the relationship between teaching and non-teaching staff and students; relevance, for example making sure that what children study can be combined with the validity of everyday life. In the case of the Italian school this is almost impossible. If these two elements work well, the rigor will be generated, that is [...] the student's ability to be professional, punctual, serious in work, in study. We then add two actions: to answer for personal actions and to answer for personal impact on others... responsibility but above all respect. Respect for the surrounding context and for the people who compose it.” (Interview, Big Picture Learning, 2021)

The importance of the impact on students is also underlined by the supervisor of educational and training activities of Passo dopo Passo...Insieme, who states:

“The theoretical approach of the association is a particular approach. The more people are aware of it, the easier it is to make changes, which is our aim to be a change agent with the students.” (Interview, Passo dopo Passo...Insieme, 2021).

Furthermore, the goal of *having an impact on schools* is highlighted by the president of Teach for Italy, who explains that the Italian educational system exercised the role of social elevator until the early 90s, while today it is characterized by the reproduction of educational inequalities:

“We have two goals. The first is to have an immediate impact on schools, which has an impact on the country. We see that the Italian educational system has lost its role as a social elevator. That is, until the 1980s the Italian school worked very well as a social elevator. It played this role very well. In fact, it was one of the best school systems in the world. Because from the 1950s to the 1960s it led an entire generation, an entire country, mostly illiterate and with zero skills, to enter the professional, international, modern job market. In less than a generation it has led a predominantly agricultural and illiterate population to become an urban population with minimal cultural, social and professional skills to enter the labour market. This broke down in the late 1980s, early 1990s. [...] we live in a system where if you come from an educated family, you will be educated, if you come from a disadvantaged family you will be disadvantaged. So, this is one of the most unequal systems.” (Interview, Teach for Italy, 2021)

To bring about educational change, the NGO Ashoka Italia involves teenagers who are already “changemakers” in its programs to redefine the idea of success and the mentality behind the emergence of social problems, by sharing stories and inspirations from these young people. As mentioned by the youth years programme manager:

"There are 296 Changemaker schools all over the world: 119 in Europe and 11 in Italy. [...] Furthermore, one of the programs we have promoted in recent years is called "Ashoka Young Changemakers". [...] We want to redefine the idea of success. We can do this thanks to the example of young people who are already changemakers. [...] Once the young people are selected, the second program is called Peer-to-peer online. So, these young teenagers meet and carry out a project together. The third program is called Live Young and is a global communication campaign in which we spread the stories and inspirations of these young changemakers. These programs are all programs, along with others we promote, which are not interested in having a direct impact on target groups. Instead, they serve to change the system, on the one hand, but above all the paradigm and mentality behind the emergence of social problems." (Interview, Ashoka Italia, 2021).

As for the educational system, Ashoka Italia aims to change it on a general level, providing young people with the skills to become changemakers. As the respondent explains:

"We are looking for school experiences [...] to give young people the skills to become a changemaker. We identify them, we network them, we equip them with the skills and means to work on a systemic level. Not only by disseminating their best practices, but by trying to identify the barriers to change the educational system in which they operate, so that the innovation they bring can be developed in other places and contexts."

Moreover, Ashoka's mentality is based on the centrality of the so-called "soft skills", such as cognitive empathy, teamwork, problem solving and collaboration plus the proactive attitude to change. As he continues:

"This new world characterized by change is based on different skills needed to play the new game and live in a world like this. As our founder says, these skills are on the opposite side of what we have been told. Ashoka is part of a mentality of those organizations that support the centrality of "soft skills", or "21st century skills", or the skills at the center of that terminological debate. The most relevant are cognitive empathy, teamwork, problem solving, collaboration, plus a skill that is not really a skill but an attitude. This is changemaking, that is the proactive attitude to change. So, faced with a change, you cannot stop, because you should want to change things. At the basis of this reasoning there are programs related to the field of education."

Finally, the importance to become "agents of change" is underlined also by the vice president of the voluntary organization Passo dopo Passo...Insieme, who states that professional educators should become "education entrepreneurs":

"I would like to create a school for professional educators in the future. In the sense that, not so much a school recognized by the ministry, but we are working on a training course for recent graduates with the idea that these professional educators can acquire skills to truly become agents of change. Indeed, I would say more: education entrepreneurs." (Interview, Passo dopo Passo...Insieme, 2021).

**Table 10.4 Advocacy strategies to pursue educational change**

<b>Advocacy strategies to pursue educational change</b>	<b>Types of activities</b>
<b>Making students accountable for their actions and impact on others</b>	Improving the relationship between teaching and non-teaching staff and students; increasing the relevance of what is studied in daily life; encouraging rigor in studying, a sense of responsibility and respect for one's actions
<b>Impacting on schools</b>	Restoring the Italian educational system to the role of social elevator it had from the 1950s to the 1960s
<b>Generating education entrepreneurs</b>	Making recent graduates become professional educators through training courses and providing them with the necessary skills to become agents of change
<b>Making people changemakers</b>	Making people proactive to change by including social entrepreneurs in education networks and providing them with the skills needed to change the educational system

In conclusion, the new philanthropic organizations aim to bring about educational change by providing students with the so-called “soft skills”, or “21st century skills”, but also with the aptitude to be “changemakers”, that is, to be proactive to change. These organizations also pursue change in the educational system, by stimulating the ability of rigorous pupils to have an impact on others, encouraging the ability of young changemakers to identify barriers to change within the educational system and counteract them, and finally by training professional educators to become agents of change or “education entrepreneurs”.

### **Box 10.3 The “Agenda for change” of the Learning for Well-being foundation**

In order to achieve educational change, Learning for Well-being proposes four policy imperatives that collectively constitute the basis of a reform agenda and emphasize the need to create synergy among various stakeholders.

- *Policy principle 1* promotes an integrated framework to support collaboration across diverse agencies and practitioners due to the many barriers to progress. One of the biggest barriers is the degree to which the work on learning and well-being has been fragmented across sectors and disciplines. For example, the practitioner working in child welfare, the physician, the communication specialist, and the educator are all likely to view the needs of children in very different ways and to suggest different approaches to meeting those needs.
- *Policy principle 2* supports ongoing development of evaluation to shape more effective policies at international, national and community levels, focusing on international and national indices of well-being. The multi-dimensional design of indices, which include a range of objective of children’s well-being in different contexts, including education, is aimed at potentially providing insights on more effective interagency working to support learning and well-being and influence the allocation of resources.
- *Policy Principle 3* aims to create opportunities for peer learning among policy-makers as well as practitioners. Stakeholders working in different contexts may identify some common principles of effective approaches that may then be adapted as needed for local contexts. This kind of peer learning can also support a culture of entrepreneurship and initiative.
- *Policy Principle 4* engages children as competent partners in matters that affect them. This means not only that their voices are heard, but that they are also taken into account. The participation of children in the life of their schools and communities helps children expand their awareness, boost their self-confidence, and deepen their sense of belonging to their school and society (Awartani & Looney, 2015).

#### **10.2.4 Advocacy strategies to empower in digital skills**

Advocacy strategies to achieve social inclusion in Italian education include the *growth of personal skills*, such as those related to digitalization. The need to increase digital skills is highlighted by the

respondents from different organizations, such as the president of the European Digital Learning Network association who argues:

"We are conducting many different campaigns to raise people's awareness of the potential of education and digital technologies. We are also conducting research on European citizens' awareness of how social media and internet data are used, or on filling in the fields when purchasing by credit card, to understand how much the European citizen is aware of the danger of leaving information around: not only financial data, but also data relating to one's presence on the internet. Classic examples are social media profiles, the distortion and use of fake profiles and so on." (Interview, European Digital Learning Network, 2019).

The importance of empowerment, understood as the *promotion of skills and competences*, making the beneficiaries of advocacy actions protagonists and not only recipients of welfare initiatives, is underlined by the president of the association EuFemia who confirms :

"[...] Involvement with respect to action, which makes the beneficiaries active subjects. Then each region, group, city does it differently, but the principles we have developed would like to go in a direction of activation - now empowerment is a word that is used a lot - but of promoting skills and competences. There, too, protagonism and not just welfare." (Interview, EuFemia, 2021).

Furthermore, Big Picture Learning school principal explains important educational work is needed to *teach students how to use technologies*, and in particular personal computers or digital tools:

"The big problem here is that we take this for granted: our students regularly work with personal computers. In reality, one of the problems we have had, in particular with our partner Sellalab, since they come from the digital world, is: we give technology to students. They quickly become super students. It is not true. However, it is not true that if I give someone a Ferrari, that person becomes Ayrton Senna. Basically, there is a lot of educational work, from the use of mobile phones to the use of digital tools [...]." (Interview, Big Picture Learning, 2021).

The *Empowerment of young people* is of primary importance for new philanthropic organizations dealing with disadvantaged students. In fact, as stated by the president of the Amici di Peter Pan association, addressing young people is a must, due to their high unemployment rate and the lack of policies that value them:

"Currently an employee named Alfonso, who is 20 years old and who works with us under contract, answered the phone. Most of the professionals you see in the team section of our site are young. There are seniors, of course, like me or others. But, in short, I think three-quarters don't make it to 30 years. This is because what we want to transfer is that we truly believe in the sustainability of projects implemented by young people. Think that Naples is the youngest city in Italy. Campania is the youngest region in Europe. Active policies, city policies for young people do not exist, because young people in Naples are a problem. There is an unemployment rate of 50%: 30% of this 50% is NEET, the famous young people

who do not study or work. Therefore, facing them from our point of view is a must. Because everyone talks about valuing young people, doing things for young people, policies for young people. We try to do it seriously and niche. In the sense that our projects are not aimed at hundreds and hundreds of young people. They are aimed at class groups. This is the method with which we have decided to work." (Interview, Amici di Peter Pan, 2021).

**Table 10.5 Advocacy strategies to empower in digital skills**

<b>Advocacy strategies to empower in digital skills</b>	<b>Types of activities</b>
<b>Raising awareness on the potential of the digital technologies</b>	Conducting campaigns to raise awareness of the use of social media and the dangers of leaving information about oneself on internet
<b>Promoting skills</b>	Involving people in the training of skills not only as beneficiaries of the welfare system, but also as active subjects and protagonists
<b>Promoting trainings on digital technologies</b>	Educating students in the use of digital technologies (computers, mobile phones and digital tools) as partners in initiatives sometimes come from the digital world
<b>Including disadvantaged students in work activities</b>	Valuing and hiring young people by supporting youth-centered projects; acting in small groups

In conclusion, advocacy strategies for youth empowerment are increasing in their importance due to the spread of digital technologies and social media and the need to train on the use of various digital tools. Finally, addressing the disadvantaged students is fundamental to concretely empower and involve them in sustainable projects, to make them protagonists of welfare initiatives and not just beneficiaries.

#### **Box 10.4 The social promotion association EuFemia pursuing digital literacy**

EuFemia is an Italian cultural promotion association focused on social inclusion, pursued through active citizenship actions and intercultural dialogue. It designs and coordinates local and international projects aimed at the development of the educating community.

“We have designed and implemented non-formal education courses that offer the educating community the necessary tools to orient themselves in the world of ICT and accompany students (minors or adults) in the conscious use of digital devices and media.” (EuFemia website).

The EuFemia's team develops educational tools, based on non-formal, peer-to-peer and learning-by-doing education and promotes European volunteering as a feature of personal and social growth, through supporting and spreading the values of international mobility. Eufemia is also active locally as a member of the Piedmontese NGO Consortium (COP, Consorzio ONG Piemontesi) and is a player in the network of collaborations between the local public and private institutions.

Since 2012, Eufemia has provided various entities and other associations with support in computer literacy, through workshops and trainings. Its digital experts are attentive to the issue of social media in training contexts such as schools and youth associations.

Among its projects, *Offline* aims at “demystifying technological tools”, by enhancing critical and creative skills. *Offline* is an experimental digital and media literacy initiative to promote the responsible use of IT through a playful-didactic immersion in social media, smartphones and digital technologies. The laboratory's methodology is experiential and peer-to-peer. The project is also aimed at encouraging to discover the possibilities offered by ICT and the related risks, providing laboratories, workshops and debates between students, families and schools, in order to generate positive change.

Source: <https://eufemia.eu/aree-di-lavoro/digital-media/>

### **10.3 Scenery: actors and relations**

In the following sections, in order to explore the second objective of the research and clarify who are the main players in social investment strategies focused on advocacy for social inclusion in education and their main connections, I will investigate an Italian education advocacy network, highlighting the main organizations that compose it and how they mobilize their financial resources in order to create an integrated system of advocacy.

As introduced in the paragraph, the structure of this network tends to mirror the approach to education advocacy of Italian new philanthropic organizations, which are connected to public actors such as ministers, municipalities and local services.

### **10.3.1 “Eduspace” players**

In this section, the new philanthropic organizations composing an Italian education advocacy network are displayed. The graph consists of 109 nodes and 122 edges. It visualizes connections whose average degree is 1,119. The centre is occupied by organizations of various types: the Fondazione Cariplo, the NGO Ashoka Italia and the voluntary organization Passo dopo Passo...Insieme. An interesting peculiarity of the Italian education advocacy network is the importance assumed by the organizations directly related to the Ministry of Education, such as the NGOs Teach for Italy and Ashoka Italia and the think tank Alleanza per l’Infanzia. Hence, the presence of these actors reveals an approach to advocacy more oriented to communication than to “policy influence”. Moreover, the banking foundations seem to be equally influential in the Italian system of advocacy. Not only several banking foundations are involved in advocacy activities, but they connect schools, public authorities and philanthropic organizations in the enhancement of the strategies of advocacy.

In the Italian education advocacy network, foundations (27.52%) play the role of hubs by guaranteeing the connection of the network while Italian public authorities (11.93%) and associations (11.01%) are interlinked through peripheral relations (see, for example the association Amici di Peter Pan on the top left connected to the network through the social enterprise Con i Bambini). In the network, few actors show a densely connected texture and are defined by the overlapping of two types of grouping, thematic and geographic. Conceivably, organizations such as the voluntary organization Passo dopo Passo...Insieme (at the bottom right) do not only share a geographical location, but also an independent organizational culture. Specifically, Passo dopo Passo...Insieme finds in Catholic values its cultural diversity and the force to emancipate from the centre in the graph.

Furthermore, the Fondazione Cariplo, while being one of the main nodes of the graph, does not seem to play a key role in the Italian education advocacy network: the relation between local and international actors is generally mediated by other banking foundations and a prominent role is exercised by the Fondazione Compagnia di Sanpaolo and Fondazione CRT.

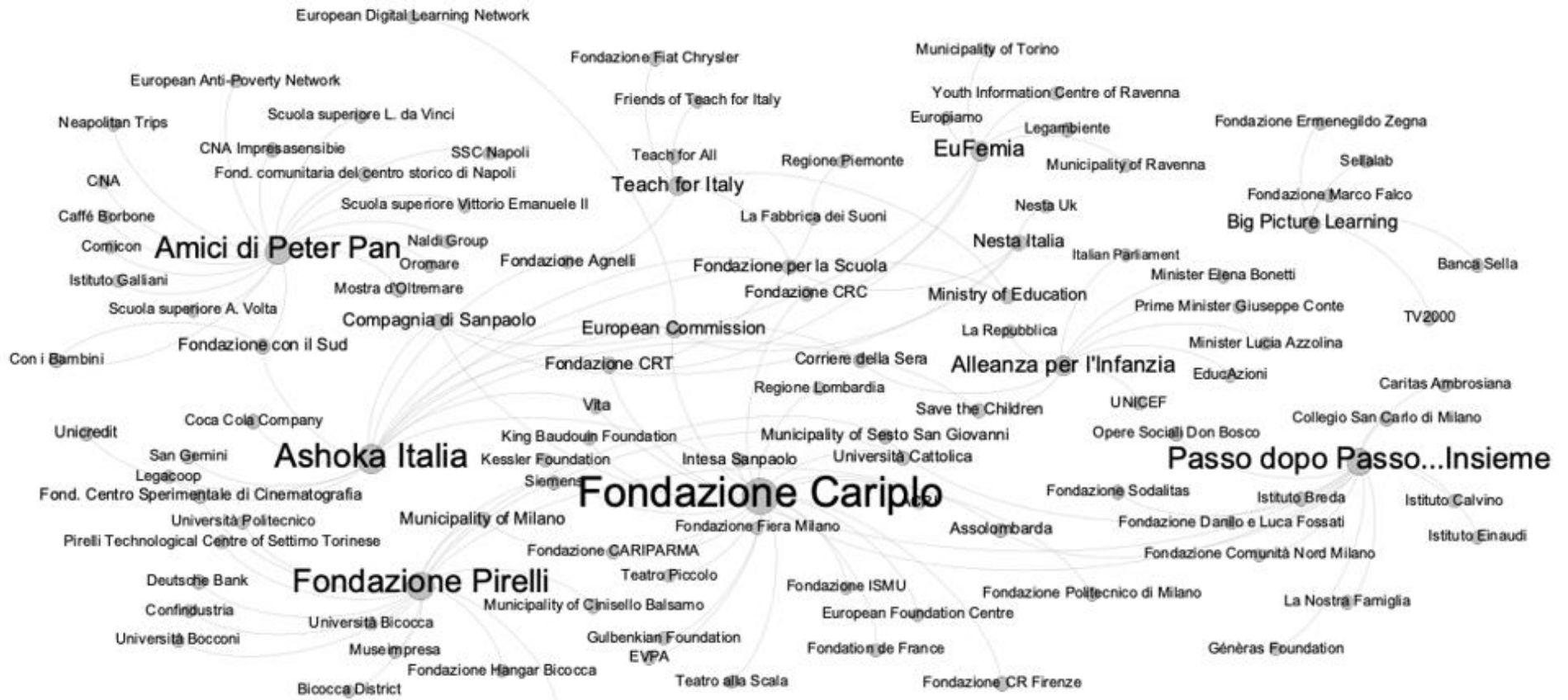


**Table 10.6 Types of organizations in an Italian education advocacy network**

Types of organization	Presence in the network (%)
Foundation	27.52
Italian public authority	11.93
Association	11.01
School	7.86
Business organization	6.42
School	8.26
Network	4.59
Academic organization	3.67
Bank	3.67
Cooperative	3.67
Italian cultural institution	2.75
NGO	2.75
Voluntary organization	2.75
Manufacturing company	1.83
Media	1.83
Multinational	1.83
Newspaper	1.83
European public authority	0.92
Foreign public authority	0.92
Social enterprise	0.92
Think tank	0.92
Total	100

As can be seen in Table 10.6, most of the organizations in the Italian education advocacy network are foundations, followed by national public bodies and associations. Despite this distribution, leading roles are exercised by “minor” actors, such as the voluntary organization *Passo after Passo... Insieme* and the think tank *Alleanza per l'Infanzia*, which are directly linked to Italian public authorities such as, for example, the municipalities and Italian parliament and ministries. In addition, other “small” organizations, such as the *European Digital Learning Network* association, are linked to the European Commission through participation in consultations in order to provide advice and opinions on specific issues. I will introduce these issues relating to the education advocacy strategies adopted by the Italian new philanthropic organizations to access national and European policy-making in the next sections.

Figure 10.1 Italian education advocacy network



### 10.3.2 Advocacy as “hearing” with the government

Figure 10.1 allows representing the scenario of an Italian education advocacy network, where the partial latency of national initiatives oriented towards a better-quality education allowed the emergence of various peripheral projects to be addressed to the Italian ministers and parliament.

Hence, the education advocacy network displayed in this paragraph is heterogeneous. It gathers actors coming from different social spheres, from cultural establishments to economic enterprises, from experts to researchers. The connections between these actors are not less mixed, spanning from advising to funding, from collaboration to market interests. Moreover, this combination of moral, economic and social capitals can ensure a “‘hearing’ within government for policy idea”. All of this also gives a particular social texture to these education advocacy networks, which are made up of a complex web of social, political and business relationships that join up finance capital with philanthropy, think-tanks and political actors, nationally and internationally (Ball & Junemann, 2012).

This connection between social, political and business spheres is confirmed by the contributor and spokesman of the think tank Alleanza per l'Infanzia, who explains:

“Alleanza per l'Infanzia was born from an idea [...] to put around a table, on the one hand, a whole series of researchers and university professors who deal with policies for children from various points of view. And, on the other hand, associations, institutions, and also trade unions, which deal with the same issues in different forms, from scholars and researchers to sociologists, political scientists, economists, demographers [...] The idea is to bring together people who study childhood, policies for children from different points of view.” (Interview, Alleanza per l'Infanzia, 2021)

Moreover, as the respondent continues on the relationship between the Alleanza per l'Infanzia and the Italian politicians:

“We have had various meetings with the various ministers who dealt with various issues in recent months. In some cases, we have asked for the meetings. We have generally been granted. From a certain point of view, one can see it as the ability of ministers, in particular Minister Bonetti [Minister for equal opportunities and family] and Minister Azzolina [Minister of education], at the time, to listen to civil society, including us. If one sees it from another point of view, one can say: 'Yes, clearly there is a capacity for attention on the part of the two ministers, but also a reputation that Alleanza has built for itself, for which they considered it a good idea to listen to us. Probably, if we didn't have a good reputation, they wouldn't have spent time with us. So, I would say that since we became more active and had a meeting with the Prime Minister Conte, that is when we began to interact with national institutions, compatibly with the health crisis and all related problems, we have always had the opportunity at least to be listened to and discuss. There has always been, how to say, attention to what we were proposing. Then, rightly, we are a network, and the institutions have a much more specific decision-making role.”

The think tank Alleanza per l'Infanzia constitutes a national network of organizations committed to promoting the rights of children, young people and their parents, by raising awareness on politics, so to carry out reforms and initiatives, and by supporting businesses and local communities in building more favourable environments for families. Alleanza per l'Infanzia also shares the indications of the Convention on the Rights of the Child of the WHO and UNICEF on "Nurturing care for early childhood development", of the European Pillar of Social Rights and the EU Directive 2019/1158 on work-life balance for parents and carers and the proposed recommendation for the implementation of a high-quality early care and educational system (Alleanza per l'Infanzia website<sup>62</sup>).

The advocacy strategy of Alleanza per l'Infanzia is sustained by a complex network of institutions, associations, NGOs, groups and individuals. Hence, in the latest years, it has coped with the urgency of building an advocacy system capable of involving all the private and public actors who can help improve the Italian childcare system.

**Figure 10.2 The education advocacy network of the think tank Alleanza per l'Infanzia**



In conclusion, the advocacy strategies introduced in the next paragraph (redefining childhood education, improving quality in the educational system, promoting educational change and empowering students in digital skills) position new philanthropists as “policy entrepreneurs”, granting new philanthropists the status of “specialists” and enabling the creation of supportive relationship between new philanthropic organizations and policy-makers. Such practices, within the broader context of neo-liberal shifts towards network governance, allow new philanthropy to operate not as a policy influencer, but as part of the policy-making process itself (Avelar, 2018).

<sup>62</sup> <https://www.alleanzainfanzia.it/>

## 10.4 Case study no. 2: Passo dopo Passo...Insieme

The case study to present the advocacy strategies carried out by the new philanthropic organizations to achieve social inclusion in education was unique and represented by the voluntary organization Passo dopo Passo...Insieme. In the next sections, I will explain how this organization is focused on providing training courses for students, parents and companies and an after-school service for middle school pupils to achieve inclusive education.

Passo dopo Passo...Insieme also aims at religious principles to implement its education advocacy strategies. The organization therefore adopted the lean form of volunteering to reach a large number of students with educational difficulties.

### 10.4.1 An education advocacy project originated in the Milanese oratories

The voluntary organization Passo dopo Passo...Insieme was founded in 2003 as a protected educational space for the well-being of children between 11 and 14 years of age. The idea was born following an in-depth observation carried out by the founders of the association of the dense network of relationships involving the after-school activities carried out in the oratory of the Santo Stefano parish in Sesto San Giovanni, in the province of Milan. As stated by the vice president and coordinator of educational activities:

“Passo dopo Passo...Insieme [...] comes from a previous experience in a parish, in an oratory. There I carried out the civil service in 1999. With the parish priest who was in the oratory [...] in 2003 we built the organization in the form we found the leanest at the time. It was the associative form. Hence, it was a non-profit organization. With non-profit tax authorization.” (Interview, Passo dopo Passo...Insieme, 2021).

During the meetings with the families, various discussions emerged on educational methods to overcome the educational difficulties of the students. Therefore, the founders of the association aimed to remodel the traditional Italian after-school service, equipping it with a new method consisting of a place open to all children according to a promotional vision, coordinated by trained volunteers, where doing the daily homework could become an opportunity to learn how to be "organized, autonomous and to work with others". As mentioned on the Passo dopo Passo...Insieme website<sup>63</sup>:

“Meglio dopo, Insieme’ integrates those with academic difficulties and those without, Italians and foreigners, Catholics and non-Catholics, those with social problems and those without them, children and adults; it also harmoniously combines the professional dimension and the voluntary dimension. [...] We use homework to achieve three goals: the first is organization, the second is autonomy and the third is teamwork. These three objectives are transversal. For example, with regard to self-organization, starting from the

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<sup>63</sup> <https://www.passodopopassoinsieme.it/sostegno-allo-studio/>

basics: how to keep an agenda, how to write down the tasks to be done on the agenda, how to consult an agenda, an electronic register. The second aspect of the organizational task is time management, where "I don't want to do my homework", "I'm tired" comes into play. All reasons and excuses that serve as an alibi for not doing homework."

Furthermore, as explained by the supervisor of the educational and training activities:

"The association, as stated on the website, has three objectives to achieve, which are: autonomy, organization and knowing how to work in a group. Let's say that these are the three focuses we have, around which everything revolves as regards the activities. And, so homework is somehow a pretext to teach students to deal with the things in life. [...] It's called "Meglio dopo, Insieme" this space of the three after-school services where there are volunteers, a coordinator and a crowd of teenagers who follow the students of the middle school, because our target is mainly the middle school [...] in normal times there are more or less 2/3 students per volunteer and there is a whole planning behind how they approach the study to achieve the three objectives I mentioned above. " (Interview, Passo dopo Passo...Insieme, 2021).

Moreover, as stated in its statute, Passo dopo Passo...Insieme is apolitical and independent and carries out its non-profit activity with the pursuit of educational, civic, solidarity and social utility purposes in favour of the younger generations and adults, paying particular attention to creating places of social integration. The association also claims to be inspired in its activities by Christian values.

In conclusion, the aims of the association are: to promote and support initiatives intended to prevent the discomfort of young generations; establish a relationship of trust and collaboration necessary for the realization of a profitable educational work; sponsor coordination activities with educational agencies in the reference area in order to create a collaborative network that can host integrated educational and training interventions; promote inclusive activities for marginalized people.

#### **10.4.2 The internal organization**

As regards the internal organization, the Passo dopo Passo...Insieme team is made up of: 1 service coordinator, 3 professional educators and 1 psychotherapist psychologist. The service coordinator reports directly to the board of directors on the association's activities. The assembly of the members of the association is composed of 40 associates and deliberates through the election of the board of directors, with a three-year assignment, composed of a president, a vice president, a secretary and a treasurer.

Furthermore, the educational offer plan (piano di offerta educativa) is planned and verified in weekly teams by the operators and in the monthly meeting of the supervision team. Then, the final reports are shared with the board of directors and supporters.

**Table 10.7 Educational Offer Plan of Passo dopo Passo...Insieme (school year 2022/2023)**

<b>Area</b>	<b>Target</b>	<b>Training</b>	<b>Activities</b>
<b>School motivation</b>	Families/Parishes	Meglio dopo, Insieme	Support to school motivation
	Schools	Ascolto educato	Listening space for preteens
	Families/Parishes/Schools	Motivati ad apprendere	Laboratories for study training
	Families	E-state al passo	Summer vacation homework
	Families	Inverno al passo	Winter vacation homework
	Families/Parishes	Studio educato	Individual study training for middle school and second year high school students
<b>Constructive training</b>	Families	Diamoci un taglio	School advice desk for parents
	Schools	Professione triangolare	Training for teachers
	Families/Schools/Parishes/Companies	Temperamento da genitori	Training for parents
	Companies	Strategie incisive	How to manage relationships at work
	Parishes	Im-pronta animazione	Training for entertainers
	Parishes	Punto.Grest	Management of the summer oratories
<b>Local awareness</b>	Schools/Companies	Io volo-ntario in alto	Discovering personal resources
<b>Know-how</b>	Parishes/Schools	Per stare al passo	How to create a "Meglio dopo, Insieme"

Regarding the internal organization of Passo dopo Passo...Insieme, the vice president and coordinator of educational activities explains:

“The internal organization works in this way: there is the shareholders' meeting, which elects the board of directors. Then, the board of directors, internally, appoints the institutional positions; the coordinator of the services works with the staff of the board of

directors, who in this case is me. The supervisor, the psychologist-psychotherapist, is on the staff of the services coordinator. Then, at the hierarchical level, below there is the work team of professionals and finally there are the volunteers. Therefore, it is a fairly hierarchical organization that can work better in this way, because we are small. Small, but with somewhat consistent numbers.” (Interview, Passo dopo Passo...Insieme, 2021)

A fundamental role, therefore, is exercised by the volunteers who follow the students during the “Meglio dopo, Insieme” after school sessions. Regarding the recruitment of volunteers, as mentioned by the respondent:

“We try to involve in our work, in our organization, the children of the third year of high school onwards. In the sense that we go to the main schools of Sesto San Giovanni, therefore Erasmo, De Nicola, Spinelli, to hold a meeting for the promotion of volunteering in every third-year class. So, initially we present a short video and then we structure the meetings and at the end we collect the adhesions of the students who want to carry out the voluntary service. Therefore, a service that, as they always say, is not a voluntary service for everyone, because it is not just doing homework with the students. But it implies a series of interpersonal skills, which can be especially useful for the children who are being cared for. Because the volunteers, who may still be busy at school, can be seen as an example by the students. And, for the volunteers themselves, the teenagers themselves, it is certainly a growth path also from an organizational point of view. In fact, even simply giving a two-hour weekly availability implies a personal and scholastic organization. The circumstance of making absences means reporting it to the coordinator and the educator and then, subsequently, making up for this absence. So, it's a bit of training in preparation for the future, as a worker.”

Furthermore, the selection of volunteers takes place internally between the board and the vice president and supervisor of the educational activities. As stated by the interviewee:

"The steps are these: we receive an application; then we look for candidates. First of all, there is an interview with me, with the services coordinator, who makes an evaluation according to the parameters we have shared. Second step: if I think about it appropriate, there is a second step, which is done with our psychologist-psychotherapist [...] and, of course, we try to make sure that the person not only has the qualifications to do this after-school volunteering, but also wants to learn. Because, unfortunately, we check that students leave the university and they know exactly what they knew before."

#### **10.4.3 The main educational project: “Meglio dopo, Insieme”**

As stated on the website of Passo dopo Passo...Insieme, the after-school project “Meglio dopo, Insieme” aims to encourage pre-adolescents and their families to take responsibility for school. It also intends to



promote the motivation to study to face difficulties or problems in studying, developing a network between associations and educational agencies. The service is aimed at middle school students and sees the involvement of families, volunteers, parishes and local rehabilitation bodies. The “Meglio dopo, Insieme” takes place from September to June and is active in the oratories of the parishes of Santo Stefano and San Giovanni Battista in the municipality of Sesto San Giovanni and Sacra Famiglia in Milan.

Participation in the activities is provided by the students in agreement with their parents. Moreover, the “Meglio dopo, Insieme” does not intend to give “cheap” repetitions but to promote an educational work which, as we have seen in the previous paragraph, tends to encourage: organization, through the correct use of the agenda, school material and time available; autonomy, or the ability to know how to work alone and ask for help in case of need; teamwork, through collaboration with other students and volunteers.

Furthermore, to encourage an educational environment favourable to socialization, play moments are planned before the start of study activities. In fact, the afternoon of activities begins with a moment of welcome and play, in which the students can organize themselves independently. Then students, volunteers and coordinators meet for the opening prayer before dividing the volunteers to carry out the activities with a ratio of one in three students.

The “Meglio dopo, Insieme” is monitored in progress, through weekly and monthly supervision team meetings. It is also assessed through periodic meetings with volunteers, and with revisions with teachers and school managers. The final evaluation with the beneficiaries of the service, who are the students, takes place through the administration of satisfaction questionnaires, the results of which are used to plan the following year’s activities. Furthermore, a report is periodically drawn up by professionals and then compared with the board of directors.

Some results of the after-school service “Meglio dopo, Insieme” are: 99% of the children who attend the after-school courses finish the school year; 80% of the students reconfirm their participation the following year; 98% of the students who participate in the after-school activities achieve academic success (Passo dopo Passo...Insieme website<sup>64</sup>).

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<sup>64</sup> <https://www.passodopopassoinsieme.it/>



**Figure 10.3** Entrance to the oratory of the church of San Giovanni Battista in Sesto San Giovanni where the after-school service “Meglio dopo, Insieme” is held



**Figure 10.4** An after-school classroom with desks spaced apart due to the Covid-19 pandemic



**Figure 10.5 After-school service office room**



**Figure 10.6 Outdoor space of the oratory where students can play before starting homework with the volunteers**



**Figure 10.7 Students gathered in a moment of prayer before starting homework**



**Figure 10.8 “Meglio dopo, Insieme” after-school activities with the volunteers**

#### **10.4.4 A network of relations involving parishes, public and private entities**

The association works in collaboration with a number of actors, both from the public and private sector. It also deals with parishes and oratories, where educational activities are carried out. As underlined by the vice president and coordinator of educational activities of Passo dopo Passo...Insieme, the principal interlocutors of the organization are the students:

"The association basically works with everyone. It is clear that the first partners are the families of the children. Our main customers are the students, because they are the ones who benefit directly of the services. The families indirectly. [...] The second step is the parishes and oratories in which we operate. Our operators are in constant close contact with parish priests and nuns. Why? Because they host us, they share the project. We are not an oratory experience, but we are in an oratory experience. That is, we are part of the education offer that the oratory provides." (Interview, Passo dopo Passo...Insieme, 2021).

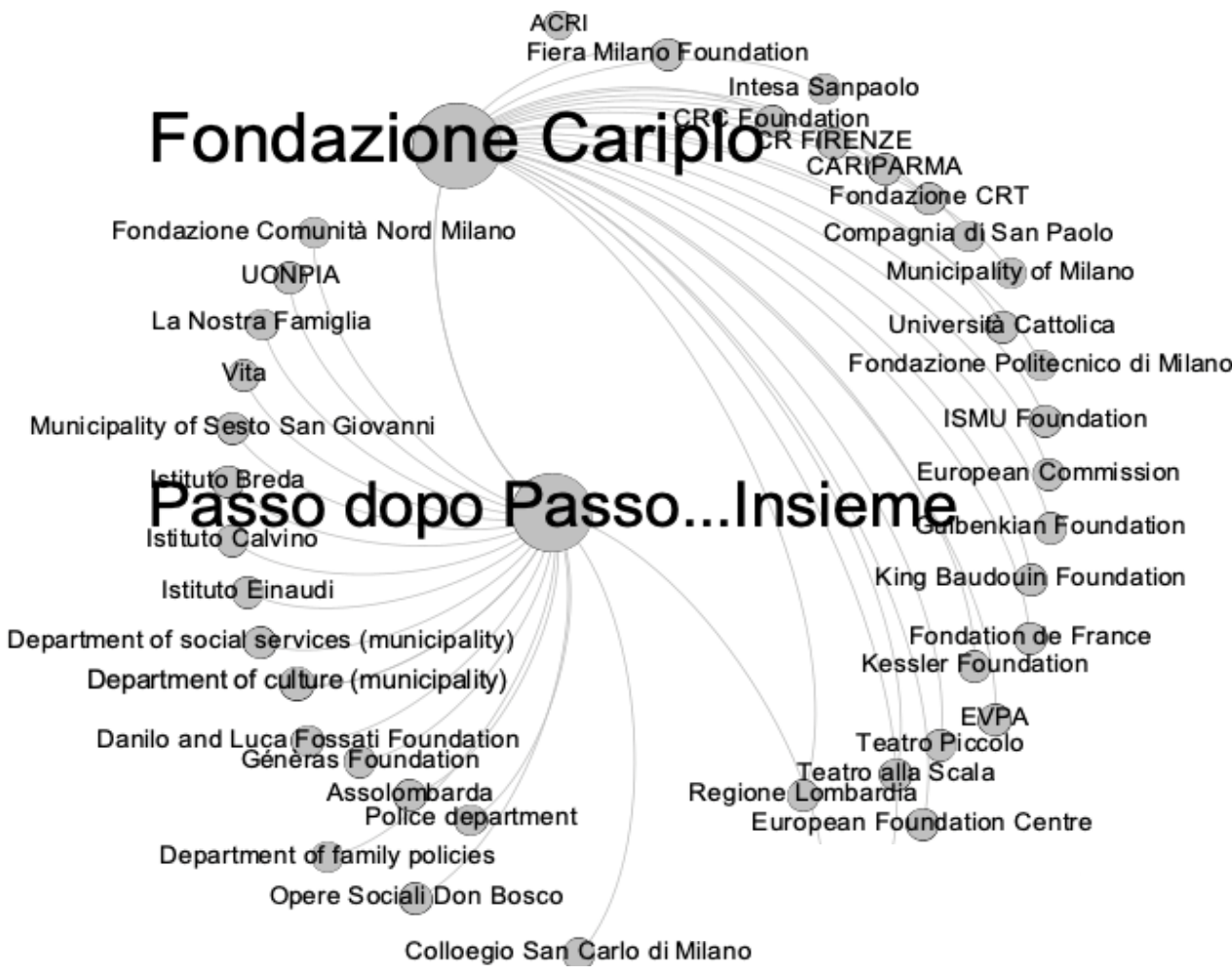
The respondent, among the collaborators of the organization, also lists the public bodies:

"[...] The municipal administration, which is an institution with which we collaborate. But, also, the Department of Social Services, Culture, etc. [...] So, as far as relations with the municipality are concerned, there is certainly a direct relationship with social services, because some situations, some of them, are followed by social services."

Concerning private organizations, as affirmed by the interviewee, Passo dopo Passo...Insieme cooperates with foundations, associations and companies:

"[...] Danilo and Luca Fossati Philanthropic Foundation, a Swiss foundation; Fondazione Cariplo which everyone knows. And then we have contacts with other entities of the private sector, who are present depending on the situation. We also have contacts with companies. We work more and more in contact with the corporate volunteering department of the Sodalitas Foundation which reports to Assolombarda [association of Lombard companies]."

Figure 10.9 The education advocacy network of the voluntary organization Passo dopo Passo...Insieme



Finally, the relationships established by Passo dopo Passo...Insieme are integrated into political networks involving public authorities, philanthropy and businesses as members of heterarchies aiming to provide a quality educational offer, expanding opportunities for both students and companies. Moreover, as the graph above shows, the voluntary organization Passo dopo Passo...Insieme is able to reach a wide network of actors thanks to the connection with the Fondazione Cariplo, which plays the role of boundary actor. Moreover, through the relationships of the Fondazione Cariplo with other banking foundations (Fondazione CRT and Compagnia di Sanpaolo), national and European public authorities (municipality of Milan, Lombardy Region and European Commission) and academic organizations (Catholic University and Polytechnic of Milan Foundation), Passo dopo Passo...Insieme can indirectly access to a wide network of organizations focused on education advocacy and policy-makers.

### 10.4.5 The financial resources of Passo dopo Passo...Insieme

As stated on the website of Passo dopo Passo...Insieme, 87% of the economic resources are used in educational activities (Passo dopo Passo...Insieme website<sup>65</sup>). Moreover, as declared in the article 7 of the organization statute<sup>66</sup>:

“The assets of the association, used for carrying out the statutory activities with the purposes of the exclusive pursuit of civic, solidarity and social utility objectives, are constituted by: the initial endowment fund; movable and immovable properties; donations, bequests and inheritances [...].”

The organization also draws funds from: membership fees; support to specific and documented activities or projects provided by public bodies or institutions; contributions from the state, private entities, international organizations and private subjects; events and other occasional fundraising initiatives.

Hence, as mentioned by the vice president and coordinator of the educational activities of Passo dopo Passo...Insieme:

“On the one hand, there are membership fees and voluntary contributions. That is, whoever comes into contact with us and receives a service from us gives a contribution, which is never the full cost. I'll give you an example: for a student who comes to the “Meglio dopo, Insieme” the family would have to pay 900 euros. We ask for 260. These are the data for January 2021. So, a part, which is 44.4% of the funds, comes from individuals. These are voluntary contributions and membership fees. From the granting foundations, 22.1%. From non-profit entities, therefore from parishes - we carry out projects with equal schools - and other associations that support us, we get 16.1%. The 5 \* 1000<sup>67</sup> is approximately 17.1%. Public bodies are around 0%. Last year, to give you an idea, we were, basically, with 61.35% deriving from foundations. So, we talk about the [financial] year 2019/2020; 17.30% from individuals, or membership fees; 12.14% from non-profit organizations; 5% from companies; 4.18% from 5 \* 1000; public funds 0%. So, it is clear that we are still 60% dependent on the foundations. Which, if they decide to turn off the taps, would really become a problem.” (Interview, Passo dopo Passo...Insieme, 2021).

A strategic choice in order to work with less money and being less dependent on private funding has been the registration of Passo dopo Passo...Insieme as a volunteer organization. As claimed by the respondent:

“We registered the organization in the list of regional volunteer organizations. This allows for absolute democracy. That is, the organization works with much less money, but like a joint stock company.” (Interview, Passo dopo Passo...Insieme, 2021)

Furthermore, concerning the financial aspects of the association he argues:

<sup>65</sup> <https://www.passodopopassoinsieme.it/>

<sup>66</sup> [https://www.passodopopassoinsieme.it/wp-content/uploads/2019/12/Nuovo\\_statuto\\_2019.pdf](https://www.passodopopassoinsieme.it/wp-content/uploads/2019/12/Nuovo_statuto_2019.pdf).

<sup>67</sup> 5 \* 1000 is the share of personal income tax that the taxpayer can allocate to non-profit organizations each year.

"Perhaps I use terms that are not of the third sector. The goal is to make ourselves known on the market. Our idea is: what can we do to become sustainable? We can make available the expertise gained, which is precisely the experience gained in the creation of the activities that we call "Meglio dopo, Insieme", which have the task of helping children through their homework to acquire skills of work organization, autonomy and of team work." (Interview, Passo dopo Passo...Insieme, 2021).

Moreover, as shown in Table 10.8, the total income from contributions and donations is €238,840.46 in the social year 2020-2021. However, this amount is not sufficient to cover the total costs and a deficit of €2.604,55 is generated.

**Table 10.8 Balance sheet of Passo dopo Passo...Insieme for the social year 2020-2021 (as of 31 August 2021)**

<b>Charges</b>	<b>Amount (€)</b>	<b>Proceeds</b>	<b>Amount (€)</b>
<b>Consumables</b>	2,335.67	<b>Contributions from individuals</b>	45,929.28
<b>Costs for employees</b>	128,369.53	<b>Donations from foundations</b>	51,200.00
<b>Costs for business consultancy</b>	41,896.29	<b>Contributions from foundations grants</b>	54,913.75
<b>Costs for fundraising consultancy</b>	18,000.00	<b>Disbursements from companies</b>	300.00
<b>Insurance policy for volunteers</b>	1,656.00	<b>Contributions from non-commercial entities</b>	71,717.00
<b>Costs for tax consultancy</b>	26,576.34	<b>Contributions from public entities</b>	
<b>Capacity building project expenses</b>		<b>Contribution 5 * 1000 (year 2018)</b>	13,980.43
<b>Bank charges</b>	455.87	<b>Bank revenues</b>	4.00
<b>Management expenses</b>	16,006.16	<b>Membership fees</b>	800.00
<b>Shipping costs</b>	28.05	<b>Total incomes</b>	238,844.46
<b>Telephone charges</b>	2,180.90	<b>Active overestimations</b>	136.80
<b>Total services</b>	237,569.14	<b>Sanification contribution</b>	213.00
<b>Depreciation of tangible assets</b>	1,894.00		
<b>Total charges</b>	241,798.81	<b>Deficit</b>	2,604.55



In summary, the overall revenues of *Passo dopo Passo...Insieme* come from private giving from individuals, foundations, non-commercial entities, contribution 5 \* 1000 and membership fees. Public bodies do not provide funds to the organization, which is fully funded by private actors within its education advocacy network.

## **10.5 Conclusion**

This chapter has analyzed the strategies that new philanthropic organizations adopt to advance their agenda in defining educational policies in Italy. A description was also provided of how education advocacy strategies are implemented, how they are structured and how financial factors shape some of the advocacy dynamics that take place.

According to the second hypothesis of the research, in order to identify how advocacy in education comes into being in Italy, I introduced four strategies that are characteristic of the specific ways of relating in the education advocacy strategies implemented by new philanthropic organizations. First, the chapter illustrated how redefining early childhood education and care is a key issue to be discussed in the Italian political context, due to the high costs of access to nurseries and kindergartens and the low related supply. Moreover, a higher quality in the Italian education provision constitutes a further important argument to be supported: new philanthropic organizations are adopting different strategies in order to increase student skills, tackle school dropouts, support disadvantaged schools, sustain students with special educational needs and increase the quality of teaching. Furthermore, pursuing educational change is another goal faced by new philanthropic organizations which aim to bring about a positive transformation in the Italian educational system, through the generation of “changemaker students” who can impact other students. Finally, education advocacy strategies adopted by new philanthropic organizations carry out empowerment programs, aimed at increasing students' awareness and skills.

In conclusion, the data collected confirmed that the resources mobilized by the new philanthropic actors have been significant in promoting education advocacy strategies for social inclusion in Italy, giving voice to a wide range of students, families and communities in need of a quality educational system.

## **Conclusion of the third part**

In the third part of the thesis, the empirical investigation to explore social investment strategies in European education was illustrated, providing an examination of the data collection, visualization and analysis. Different network graphs were presented in relation to topological dimensions, such as distribution and type of organization, highlighting the different roles of new philanthropic organizations inside networks of social investment in education. The empirical analysis also introduced the fundamental activities of boundary actors, linking peripheral entities to central nodes.

Moreover, several advocacy strategies implemented through the promotion of social investment in education were classified in four categories. These strategies have been explored in the second part of the thesis and presented in the framework of the European and Italian legislation in the field of social investment in education.

Finally, in the previous chapters, particular attention was paid to the financial resources used by new philanthropic organizations to implement social investment strategies in education. I, then, presented some examples of projects carried out by these actors and the resources assigned to them in the form of grants, subsidies or non-refundable donations. These data were accompanied by the balance sheets of the new philanthropic organizations that constitute the case studies of the thesis.

## Chapter 11

### Final remarks: future directions of research in education

#### 11.1 Researching new philanthropic organizations focused on European education

This research aimed to address the question of how new philanthropic organizations promote social investment in European education by mobilizing their resources. To conclude the thesis, in this final chapter I examine the contributions of my research to education research practice, in the light of the theoretical analysis, methodological approaches and empirical findings provided.

In the introductory chapter to this thesis, I identified two objectives. First, to explore European digital education networks in which new philanthropic organizations are involved with public and private stakeholders. Second, to investigate how new philanthropic organizations mobilize their financial resources to advocate for education. Furthermore, I analyzed the social investment strategies in European education through two lines of inquiry: the link between Europeanization and new philanthropic organizations in terms of European digital education networks involving these actors; the connection between European policies funding social inclusion in education and the recommendations implemented in national contexts.

I also illustrated the systemic vision of the thesis through a research design that allows to see the links between the social investment strategies and the two lines of inquiry by showing some dynamics in education governance such as the dominant presence of boundary actors within social investment networks, the construction of geographical and thematic networks and the increase of investments in venture capital. Accordingly, based on the policy and empirical analysis, I have presented a theoretical framework for a sociological investigation of new philanthropic investments in European education. The conceptualization of social investment in education is based on the theories of the policy sociology and the sociology of education, highlighting some aspects of the new philanthropy that are central to this research, such as: the emergence of philanthrocapitalism in the reallocation of tasks within the provision of public services; the new developing relationships between private providers, consultants and non-profit organizations to solve emerging educational problems; the blurring of the unclear divisions between the public, private and third sectors allowing the emergence of heterarchies as an organizational form based on horizontal links that are defined by commercial interests; the corporatization of public schools supported by the neo-liberal economic ideology; the growing role of edu-businesses which have become influential policy players in shaping new ways of network governance in education; the marketization of European education, increasingly focused on investments enabled by Ed-Tech companies, which have expanded with the support of new philanthropic organizations.

Consequently, the second part of the thesis introduced a policy analysis that aimed to investigate the research questions originated from the theoretical conceptualization. Overall, this second part has expanded the understanding of the social investment policies adopted at the European and Italian level and the underlying mechanisms of these policies within the context of the privatization of educational systems. It also allowed to deepen the social investment strategies within the framework of Europeanization of such policies, highlighting as intersectional agents create collaborating relationships with local organizations reconfiguring the processes of policy.

Furthermore, the policy analysis emphasized the diverse roles that the new philanthropic organizations play in the social investment landscape. Therefore, the examination underlined the collaboration between actors from different social spheres in the political context of education governance: European and national institutions, new philanthropic organizations, local authorities, education agencies, etc.

Finally, the third part of the thesis illustrated an empirical investigation that demonstrated the value of the theoretical conceptualization. Notably, I illustrated the implications of the findings on the social investment strategies in networks of new philanthropic organizations. Building on topological representations of social investment networks, I developed visualizations that incorporate financial strategies related to the new philanthropy and help comprehend dynamics that are able to transform education governance through speculative strategies.

The empirical analysis was important to understand the mechanisms that encourage collaboration between public, private and non-profit actors and that help transform educational systems to enrich students' learning experience. At the same time, it contributed to the understanding of the ways in which social investment strategies can drive change in education and can thus be useful for regional and local policy-makers and practitioners to explore new ways to foster cooperation between different actors from various social and economic spheres in education governance.

## **11.2 Approaching European education networks of social investment**

After discussing the theoretical and the methodological investigations carried out, in this section I introduce some conclusions about the empirical chapters that form the core of this dissertation. Indeed, the chapters 9 and 10 provided an overview of the configuration of social investment strategies in relation to what new philanthropic organizations are doing in education governance networks. In fact, the purpose of this thesis was to come to terms with what different new philanthropic organizations (foundations, associations, cooperatives, etc.) do in the implementation of these activities.

The investigation began with an in-depth study of the Young European Research University Network through an in-person interview. As I proceeded with the interviews, it became clear that not only is huge amount of social investment in education needed to be sustained and implemented, but also that new philanthropic organizations deployed in social investment networks all play different roles (i.e. providing grants and acting as bridges between public and private actors) and that some of these networks are

connected to each other through boundary actors. Furthermore, in the empirical chapters, I presented several graphs of social investment networks focused on education, each time accompanied by explanations and interview quotes, to justify the shape of the graphs and the connections between the various actors that made up these networks.

Examples of these connections are the links established by boundary actors (constituting relations between new philanthropic organizations and distributing funds) such as banking foundations, central nodes such as private foundations (gathering and allocating funds), marginal organizations (acting in a peripheral role and connected to central nodes through boundary actors in order to get funded).

Summarizing, what chapters 9 and 10 allow to see is, firstly, what is distinctive of social investment strategies in education and, secondly, how the dynamics of social investment work in practice. Therefore, these analyzes map different new philanthropic practices in the light of the relations that are established between different actors present (central nodes, boundary actors, peripheral organizations) and at the level of the implications on the types of funds that are implemented.

In other words, chapters 9 and 10 showed what exactly the different relationships between new philanthropic organizations do, which allowed me to better identify what social investment strategies involve. Furthermore, studying how social investment strategies are established at the present time is crucial in order to know what we are talking about if we talk about social investment, at a time when research on new philanthropy is largely focused on the attribution of meaning, as seen in the third chapter where I introduced concepts such as post-capitalist philanthropy and its attempts to transform the international political agenda and monetary systems.

Finally, this thesis makes possible a new way of perceiving social investment strategies. So, by bridging a topological way of looking, this research has the potential to conceive differently about how to approach social investment strategies in education. In conclusion, this study aims to intervene to the extent that it has pioneered new ways of looking at them and how to present social investment in European education.

### **11.3 Future directions of research on social investment in education**

In this last section, I draw this dissertation near to some experimental suggestions that could provide insight into another way to adopt a critical point of view on social investment in education. I will first discuss what emerged as a central research theme, before setting out some key points for research practice.

This thesis investigated the role of social investment in European education. It was exploratory, and the research question was wide ranging. The study presented some important findings on how we understand social investment in relation to European education. The starting point of this understanding is that social investment is strongly involved in delivering European education. This thesis also suggests that most social investment strategies are implicated in supporting European education governance

even where they do not directly provide it. Indeed, the social investment in this study aimed to empower students by strengthening their skills, enabling them to better participate in education governance.

Although this study covered a research question focused on how new philanthropic organizations promote social investment in education by mobilizing their resources, the most important findings concerned the democratization of education through social investment. Indeed, new philanthropic organizations, that seemed to offer the most potential to positively shape the future of education governance, provided opportunities for students to engage with education in new ways, including improving access to educational services, supporting youth action and promoting their greater involvement in decision-making.

As I worked on this thesis, it also became increasingly clear that the research question referred to the fundamental issues of participation in society and access to services. Indeed, over the last 30–40 years the welfare state has been increasingly challenged by the withdrawal of public provision and the privatization of key services. At the same time, many formerly state-run services have been privatized and in many cases taken over by multinational corporations. Privatization has often been accompanied by intense efforts to marketize services, with initiatives aimed at encouraging service users to be seen as consumers.

Consequently, in high-income countries, a network infrastructure now distributes services that are called “foundational” because they are daily necessities, consumed by the whole population and necessary for the well-being of privileged and disadvantaged.

However, these key services need to be refocused to deliver positive outcomes for people rather than shareholders and profits, and to provide alternatives to state-led delivery, especially where the state has withdrawn support or where ongoing austerity has limited the ability to act.

In this context, the “foundational economy” describes the range of goods and services that enables people to prosper. It concerns goods and services, “necessary for the good life to be enjoyed by as many people as possible”. Within the foundational economy, foundational services are universally needed. These services include education. (Eadson et al., 2021).

Hence, the idea of owning educational infrastructure to democratize education fits into a larger sense of democracy that emerges through the empowerment of people. Such educational infrastructure will often need some form of external financial support to operate successfully where viable markets do not exist, or to shape existing markets effectively. Such support should be a priority for funding bodies because new philanthropy businesses can complement the public sectors by providing responsible services, and are consequently important players in the contemporary economy. They also play an important role by focusing on vulnerable and marginalized groups, and the social good they provide should be recognized.

In the light of these final thoughts on the role and importance of education as a foundational service in our communities, I will suggest some future research to explore. First of all, acknowledging the ethical controversies generated by the increase in venture capital investment in education governance, I consider the issues of the experience of choice process between the students from the privileged and disadvantaged classes, facilitated by the intervention of private actors in education through financial

means, technological provision, training offer, etc., a relevant theme for the development of future research in education. Furthermore, the possible reproduction of inequalities in education caused by the intervention of new philanthropic organizations could be developed in future research. In addition, It would be interesting, in the light of recent impact investing trends, to examine which types of social investment initiatives tend to affect education more than others and measure their effect on students.

In conclusion, there are various research directions in which the strategies of social investment in European education governance could be further investigated. This study therefore represented an engagement for future research and it would be positive to explore services and other forms of provision needed for the good life and education to be enjoyed by as many people as possible.

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**Les stratégies d'investissement social dans  
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Italie**

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**INVITÉS : (le cas échéant)**

# Résumé de la thèse en français

## Chapitre 1. Introduction à la recherche

Au cours des dernières décennies, dans le cadre de la «marchandisation» des relations entre les écoles (Ball, 2008), une variété de prestataires et de participants à l'offre d'éducation, tels que des organisations caritatives, des philanthropes, des sponsors commerciaux et des organisations à but non lucratif sont devenus partie intégrante des écoles, ce qui sont maintenant «connectés» de nouvelles manières dans des réseaux. Donc, l'objet de cette recherche est la promotion de l'investissement social dans l'éducation européenne par des nouveaux philanthropes. Cette promotion soulève notre question de recherche: comment les organisations de la nouvelle philanthropie promeuvent-elles l'investissement social dans l'éducation européenne en mobilisant leurs ressources?

Le premier objectif de cette étude est d'enquêter sur les réseaux européens d'éducation numérique dans lesquels des organisations de la nouvelle philanthropie sont impliquées aux côtés d'acteurs publics et privés. La première hypothèse de la recherche liée à cet objectif est la suivante: "les acteurs de la nouvelle philanthropie favorisent l'inclusion sociale dans l'éducation européenne à travers les réseaux éducatifs numériques dans lesquels ils sont intégrés".

Afin de cartographier les réseaux éducatifs numériques dans lesquels de nouveaux philanthropes s'impliquent pour promouvoir l'investissement social dans l'éducation européenne, j'ai analysé le matériel ethnographique collecté à travers les sources documentaires et les entretiens menés de 2018 à 2022. Ensuite, j'ai mis en relation le contexte, le rôle et les activités des employés des organisations de la nouvelle philanthropie que j'ai interrogés et les informations qu'ils m'ont fournies à travers les entretiens, pour comprendre quels sont les principaux nœuds à l'intérieur de ces réseaux éducatifs numériques européens, et les périphériques.

Le deuxième objectif de cette thèse est d'étudier comment les organisations de la nouvelle philanthropie mobilisent leurs ressources financières afin de plaider en faveur de l'inclusion sociale dans l'éducation. Par conséquent, la deuxième hypothèse de cette recherche est: «de nouveaux acteurs philanthropiques donnent la parole à un large éventail de groupes de plaider pour l'inclusion sociale dans l'éducation en mobilisant leurs ressources financières».

De plus, l'accent de cette seconde hypothèse est mis sur la composante «financement» de la relation entre le marché et la société. En effet, au sein des réseaux d'éducation, le financement par capital-risque est l'une des sources de financement, avec les dépenses personnelles des entrepreneurs milliardaires et la philanthropie des entreprises (Regan et Khwaja, 2019).



## **Chapitre 2. Suivre les politiques d'investissement social dans l'éducation européenne à travers l'ethnographie en réseau**

Ce chapitre analyse une méthodologie d'étude des stratégies d'investissement social dans l'éducation européenne. La méthodologie utilisée dans cette thèse est celle de l'ethnographie de réseau, qui implique une attention particulière aux organisations et aux acteurs, et à leurs relations, activités et histoires, dans le champ des politiques éducatives globales, aux connexions qui unissent ces acteurs, et aux «situations» dans lesquels les connaissances des politiques sont mobilisées.

L'ethnographie de réseau est un assemblage de tactiques et de techniques de recherche qui aborde à la fois l'organisation et les processus des relations de réseau (Avelar et Ball, 2017). Aussi, selon Ball (2016), il s'agit d'une méthode de recherche en développement qui s'intéresse à la nouvelle topographie des politiques et engage de cartographier, de visiter, de questionner et de suivre les politiques (Marcus 1995). "L'ethnographie de réseau implique une attention particulière aux organisations et aux acteurs du champ politique de l'éducation mondiale, aux chaînes, aux parcours et aux connexions qui relient ces acteurs, ainsi qu'aux "situations" et aux événements dans lesquels les idées et les méthodes politiques sont mobilisées et assemblées." (Ball et al., 2017, p. 19).

La méthode reflète également les hybridités et les flous (Ball et Junemann, 2012) qui caractérisent les réseaux politiques mondiaux. Dans une tentative de suivre les gens, c'est-à-dire le "qui" de la politique, dans cette thèse, les relations clés dans les réseaux de la nouvelle philanthropie ont été décrites dans une série d'entretiens menés avec des personnalités de différentes étendues géographiques de différents types d'organisations. Donc, je me suis concentré sur 21 entités de la nouvelle philanthropie occupant des points nodaux dans les contextes européens et italiens d'investissement social dans l'éducation, puis j'ai examiné certaines de leurs relations et activités de réseau, et j'ai documenté une partie du travail qu'elles effectuent dans la "re-contextualisation des nouveaux modes de gouvernance" de l'éducation (Ball, 2016, p. 11).

### **Recherche de réseaux d'investissement social dans l'éducation**

Les sections suivantes donnent un aperçu de la méthodologie utilisée pour l'analyse des réseaux. La méthodologie utilisée pour cette étude vise à reconnaître les significations et les idées des stratégies d'investissement social dans l'éducation européenne mises en œuvre par des organisations de la nouvelle philanthropie.

De plus, la méthodologie de la recherche a été conçue pour permettre de comprendre les interrelations entre les différents acteurs impliqués dans les stratégies d'investissement social dans l'éducation européenne et la dynamique des réseaux politiques dans lesquels ils s'inscrivent.

## **Analyse documentaire: recherches en ligne**

Dans la première phase de l'analyse empirique, une vaste recherche en ligne a été menée sur les organisations de la nouvelle philanthropie investissant dans le secteur de l'éducation en Europe. Les sources documentaires que j'ai examinées sont des documents officiels, tels que des articles, des livres, des communiqués de presse, des archives publiques, des états financiers, etc., et la soi-disant «littérature grise» composée d'informations émises au niveau gouvernemental, académique ou industriel, dans des formats électroniques et imprimés, non contrôlés par l'édition commerciale, comme des brochures, des graphiques, des programmes d'événements, des données d'enquête. Les autres documents consultés sont ceux fournis par les institutions européennes, tels que les communications, les recommandations, les documents de travail, les rapports fournis par les services de la Commission européenne, les contributions aux consultations.

Dans un premier temps, une recherche exploratoire a été menée à l'examen de relations entre acteurs. Une fois qu'une organisation centrale a été identifiée, ce nœud a été suivi pour tenter de recueillir plus de données à son sujet. En effet, lors de la visite des pages web, j'ai essayé de comprendre l'organisation (mission, membres clés, partenaires, etc.), pour mettre en évidence les liens entre les acteurs. Ainsi, il est possible d'identifier des organisations nodales en les voyant se répéter dans différents réseaux et projets. Ceci est également utile pour identifier les nœuds qui sont impliqués dans plusieurs «petits» réseaux, et qui travaillent ensemble sur des initiatives spécifiques, suivant certaines stratégies, mobilisant des ressources humaines et financières.

La collecte de données en ligne a commencé par la Lifelong Learning Platform, un site Internet rassemblant 42 organisations européennes actives dans le domaine de l'éducation et de la jeunesse. L'analyse des membres de cette organisation m'a permis d'identifier des acteurs de la nouvelle philanthropie pertinents dans le domaine de l'investissement social et axées sur l'éducation européenne et de construire des graphes exploratoires liés à ces acteurs.

Les sources de données en ligne que j'ai examinées sont classées sur la base de leur fonction dans l'analyse. Ils sont divisés en pages web d'organisations, rapports institutionnels, programmes d'événements, documents publicitaires et pages institutionnels des organisations sur les réseaux sociaux. Enfin, chaque type de document a été utilisé dans un but particulier au cours des différentes phases de l'analyse empirique.

## **Entretiens compréhensifs**

Selon Ball (1990), la recherche qualitative partage les principes de l'ethnographie en tant que tradition engagée dans la recherche de subjectivité et de sens, une suspension des idées préconçues et une orientation vers la découverte. Par conséquent, dans l'approche globale que j'ai utilisée pour mener des entretiens semi-structurés, la grille de questions est une représentation flexible et un guide pour l'enquêteur, adapté pour faire parler le sujet, en essayant d'obtenir une dynamique de conversation plus riche que les simples réponses aux questions, en restant toujours dans le thème visé. Comme l'affirme

Kauffman (2011), dans les entretiens compréhensifs, la grille de questions est une «soft guide»: une fois articulée, il est peu probable de la lire et de poser les questions dans l'ordre, même si elles doivent être présentées de manière logique et cohérente.

## **Approche par étude de cas**

Dans les sections suivantes, une méthode qualitative basée sur une approche d'étude de cas utilisant l'ethnographie des réseaux est présentée. L'ethnographie de réseau était appropriée pour une étude de cas sur les stratégies d'investissement social dans l'éducation européenne mises en œuvre par d'organisations de la nouvelle philanthropie car elle a permis de collecter suffisamment de données à partir d'un cas unique.

### **Sélection des études de cas**

Dans l'enquête empirique, plusieurs cas auraient généré trop de données pour la portée de l'étude. Bien que cela signifie qu'une partie de la richesse des descriptions d'autres organisations a été perdue, cela a permis de se concentrer davantage sur la description du réseau de gouvernance de l'étude de cas sélectionnée.

Par conséquent, des descriptions plus détaillées d'autres organisations de la nouvelle philanthropie n'étaient pas nécessaires et les données qui ne contribuaient pas directement à cette ethnographie de réseau, ainsi que pour des raisons d'espace et d'orientation éthique visant à protéger la confidentialité individuelle, n'ont pas été incluses (Ball et al., 2017).

Ainsi, faire un travail d'observation approfondi signifiait que le chercheur connaissait la mission et les objectifs des organisations de la nouvelle philanthropie. Cette observation présentait des avantages dans la préparation de la grille de questions de cette étude car cela permettait d'accéder à une grande quantité d'informations. Cependant, l'accès à ces acteurs privés a été difficile en termes de disponibilité pour un entretien enregistré.

### **Travail de terrain**

Afin d'apporter une certaine matérialité à ma compréhension des stratégies d'investissement social en éducation, notamment concernant les relations mises en place par les organisations de la nouvelle philanthropie, j'ai mené un travail de terrain à Bruxelles et Milan entre février 2018 et mars 2022. Il s'agissait d'observer des réunions et les bureaux des organisations. Ces observations de terrain ont fourni une expérience ethnographique qui m'a permis de mieux comprendre la culture des acteurs en observant les espaces, les décorations corporatives des bureaux, les événements et les discussions qui ont lieu entre les réunions.

Mon travail de terrain a commencé lorsque j'ai interviewé le responsable des relations extérieures du Young European Research Universities Network à Bruxelles, en 2018. J'ai préparé longuement cet entretien, après avoir étudié le rôle de l'interlocuteur, puis établi une grille de questions. Au cours de l'entretien, j'ai interrogé l'interviewé sur les principaux partenaires de l'organisation, et qui elle considérait comme les références et les leaders du réseau dans lequel l'organisation est impliquée.

Il y a eu deux autres situations d'observation de terrain qui ont soutenu ma compréhension du fonctionnement de la nouvelle philanthropie. En effet, les nouvelles ouvertures à la rencontre dans l'espace public en mars 2022, après la période de confinement due à la pandémie de Covid-19, m'ont permis de participer à deux observations participatives dans les espaces de l'association bénévole Passo dopo Passo... Insieme: une séance périscolaire, le «Meglio dopo, Insieme», le 11 mars 2022, et une réunion d'équipe mensuelle le 28 mars 2022.

### **Limites de la méthodologie**

La thèse se concentre sur le réseau de relations entre les organisations de la nouvelle philanthropie ciblant l'investissement social dans l'éducation européenne, car les détails des réseaux plus larges dans le domaine de l'investissement social dans l'éducation dépassent le cadre de l'étude. En même temps, dans cette étude, l'analyse reste sous-développée, en raison des contraintes d'espace. Donc, ce que j'ai tenté ici, c'est de passer de la simple cartographie des réseaux à l'analyse de la dynamique des réseaux et de la mobilité des politiques, comprises comme le travail de mise en réseau, l'évolution du réseau et le travail que les réseaux accomplissent en relation avec la réinvention de la politique et de la gouvernance dans le contexte de mouvement politique. Au cœur de cela se trouve l'idée qu'à mesure que les politiques évoluent, les sites et le paysage à travers lesquels elles se déplacent changent. Par conséquent, comme cette enquête a utilisé une méthodologie d'étude de cas, il existe une opportunité compréhensible pour d'autres études de cas d'explorer des stratégies d'investissement social dans l'éducation européenne (Ball et al., 2017).

### **Chapitre 3. La nouvelle philanthropie dans l'éducation européenne**

Ce chapitre examine les implications de la mise en œuvre des politiques d'investissement social dans les «welfare states» européens, principalement en raison de la réduction des niveaux de dépenses publiques et de la demande croissante de nouveaux services.

De plus, les sections suivantes mettent en évidence la façon dont différents acteurs sociaux ayant des relations diverses avec les entreprises sont aujourd'hui «à l'intérieur» de la politique, façonnant de nouvelles communautés politiques qui intègrent un ensemble de parties prenantes publiques et privées. Ces communautés politiques ont leurs propres relations internes de confiance et abordent les

problèmes sociaux sans recourir aux procédures traditionnelles, illustrant une interdépendance croissante des secteurs public, privé et bénévole (Ball, 2007).

### **L'émergence du «paradigme de l'investissement social»**

L'investissement social est l'ensemble des mesures et des outils politiques qui consistent à investir dans le capital humain et à améliorer la capacité des personnes à participer à la vie sociale et économique et au marché du travail (Commission Européenne, 2015). Encore, la perspective de l'investissement social se concentre sur les politiques publiques qui «préparent» les individus, les familles et les sociétés à s'adapter à différentes transformations, telles que l'émergence de nouveaux risques sociaux, plutôt que de simplement générer des réponses visant à «réparer» tout dommage causé par une défaillance du marché, le malheur social ou la prévalence des insuffisances politiques (Morel et al, 2012).

De plus, l'investissement social a pris une part importante dans les débats sur le rôle des dépenses sociales et l'avenir du «welfare state» en Europe, où son langage est devenu partie intégrante du discours institutionnel depuis l'adoption de l'agenda de Lisbonne en 2000 (Nolan, 2013). En effet, aujourd'hui, les gouvernements sont attirés par l'afflux de nouveaux fonds, de nouvelles idées et de nouvelles formes de prestation de services, en particulier en réponse aux échecs des organisations du secteur public. Dans ce contexte, une «nouvelle conception de la philanthropie et de l'aide brouille intentionnellement la frontière entre les affaires, l'entreprise, le développement et le bien public, et pose des questions fondamentales sur les méthodes et le rôle futur des agences de développement traditionnelles.» (Ball et Olmedo, 2011, p. 84).

Ces nouvelles stratégies du don et de l'investissement social utilisent également de plus en plus les modèles d'entreprise comme une nouvelle forme d'organisation, de pratique et de langage philanthropique: philanthropie de risque, investissements philanthropiques, solutions entrepreneuriales, etc. (Ball et Olmedo, 2011). De même, ces nouveaux philanthropes veulent voir des impacts et des résultats clairs et mesurables de leurs investissements, commençant également à "assumer des tâches socio-morales qui étaient auparavant assignées aux organisations de la société civile, aux entités gouvernementales et aux agences de l'État." (Shamir, 2008, p. 6). Par ailleurs, «l'imbrication étroite et manifeste entre bienveillance et business est en fait le cœur de la philanthropie contemporaine.» (Arrigoni et al., 2020, p. 2).

### **L'évolution vers la nouvelle philanthropie**

L'expression «nouvelle philanthropie» renvoie au vaste mouvement théorique et social pour repenser le non-profit, la libéralité, la solidarité et l'engagement collaboratif (Università Cattolica, 2017). En outre, les études économiques sur la philanthropie se sont souvent mêlées à la psychologie comportementale, étudiant la contradiction entre l'intérêt personnel et l'altruisme (Arrigoni et al., 2020). L'idée que la charité doit commencer à ressembler à une économie capitaliste dans laquelle les bienfaiteurs deviennent des

consommateurs d'investissement social est parfois appelée philanthrocapitalisme (Ball et Youdell, 2008).

Donc, le philanthrocapitalisme peut être défini comme la tendance des donateurs à fusionner les objectifs commerciaux avec les actions caritatives, rendant la philanthropie plus axée sur l'impact et financièrement rentable (McGoey, 2012). Puis, une caractéristique centrale du philanthrocapitalisme, au-delà de l'intérêt personnel, est sa nature moralisatrice. En effet, une nouvelle élite économique de ploutocrates composée de philanthrocapitalistes dispose de l'argent et du pouvoir de transformer la société et de résoudre les problèmes qui traversent les frontières nationales.

Le terme philanthrocapitalisme a été inventé par *The Economist* (2006), sous-tendant l'union entre les raisons de donner et les mécanismes d'accumulation (Arrigoni et al., 2020). Ainsi, Bishop et Green, dans leur livre «Philanthrocapitalism. How giving can save the world» (2008), soutiennent que le philanthrocapitalisme englobe non seulement l'application de techniques commerciales modernes au don, mais aussi l'effort d'une nouvelle génération d'entrepreneurs philanthropes et de chefs d'entreprise pour stimuler le progrès social en changeant la façon dont les entreprises et le gouvernement fonctionnent.

### **L'émergence d'une nouvelle philanthropie dans la gouvernance européenne de l'éducation**

La politique éducative a été sérieusement affectée par ce changement d'époque (Hogan et al., 2015) lié à l'émergence de la philanthropie. En outre, comme l'ont déclaré Ball et Youdell (2008), le nouveau management public «a été le principal moyen par lequel la structure et la culture des services publics sont refondues afin d'introduire et d'ancrer les mécanismes de la forme de marché et les formes de privatisation.» (p. 23). De plus, selon Normand (2011), dans le domaine de l'éducation, un budget public limité est redistribué en fonction des résultats attendus sur la base des principes de libre choix et de concurrence entre les écoles.

Dans ce contexte, il est possible d'identifier les tendances du «nouveau management public» dans l'enseignement public: la gestion scolaire devient de plus en plus une profession spécialisée; il y a une prédisposition croissante à «gouverner par contrat», ce qui est visible dans les politiques d'embauche d'autonomie des écoles, justifiées par le gouvernement central comme le besoin de plus d'accords pédagogiques et de coresponsabilité; l'examen public du gouvernement et de la gestion des écoles est en augmentation, notamment par le biais du suivi et de l'évaluation des résultats scolaires (Viseu et Carvalho, 2018).

Ainsi, dans le secteur de l'éducation, le «nouveau management public» signifie la promotion de l'autonomie et une approche managériale de l'organisation, une concurrence axée sur le marché, des incitations basées sur les résultats et des services éducatifs plus orientés vers les demandes des familles (Verger et Curran, 2014).

## **L'éducation européenne commercialisée par les acteurs de l'Ed-Tech**

La marchandisation fait référence à l'introduction des forces du marché dans l'éducation, où les gouvernements ont créé des conditions politiques qui favorisent le développement de marchés dans les services fournis par l'État (Williamson et Hogan, 2021). Les processus de marchandisation, de privatisation et de consumérisation de l'éducation sont de plus en plus axés sur la création de valeur marchande par la concurrence, le classement des performances, la demande des consommateurs et le retour sur investissement, souvent rendus possibles par les technologies numériques (Selwyn, 2011). Dans ce contexte, les fournisseurs numériques privés se sont rapidement développés dans les systèmes éducatifs dans le cadre d'une «industrie mondiale de l'éducation» (Verger et al., 2017).

En plus, les entreprises basées sur des plateformes telles que Google et Microsoft ont atteint un pouvoir sans précédent pour surveiller, prédire et influencer les comportements organisationnels, sociaux, économiques, politiques et humains grâce à l'utilisation de données numériques. Avec l'appropriation de la «matière première» des données, «la plate-forme est devenue un moyen de plus en plus dominant d'organiser les entreprises afin d'obtenir ces données, puis de les extraire, les analyser, les utiliser et les vendre» (Srnicek, 2016, p. 88).

« Il est difficile d'imaginer la gouvernance de l'éducation de nos jours sans les plateformes numériques." (Landri et Vatrella, 2019, p. 532). En outre, en tant que dispositifs marchands sociotechniques qui «font les choses», «agissent» ou «font agir les autres» (Muniesa et al. 2007, p. 2), les plateformes numériques créent de nouveaux comportements, relations et transactions marchandes, modifiant la façon dont les gens et les organisations perçoivent et agissent (Fourcade et Healy, 2017). Les acteurs de la création de marché, ou «agences de commercialisation», comprennent à la fois des entités humaines et non humaines qui «participent à l'action et au processus cognitif», et doivent être compris comme des «arrangements socio-techniques» hétérogènes qui participent collectivement à l'activité de marché (Çaliskan et Callon, 2010, p. 9). Dans ce scénario, les réseaux politiques Ed-Tech sont hybrides et instables, évoluant et s'adaptant, et fusionnant avec d'autres réseaux d'organisations plus établis qui ne sont eux-mêmes qu'une petite partie d'un remaniement plus vaste et à plus long terme de l'État, de la gouvernance et de l'éducation politique (Peruzzo et al., 2022).

## **Chapitre 4. Italie: nouvelle philanthropie et les réformes du système éducatif et du «welfare»**

Le chapitre précédent a exploré le concept de nouvelle philanthropie dans ses formes les plus récentes, comment il a été mis en œuvre dans les politiques éducatives européennes et comment ces politiques ont utilisé des questions telles que la marchandisation et la privatisation de manière à caractériser la rentabilité des opportunités pour les organisations de la nouvelle philanthropie.

Ce chapitre examine l'émergence de la nouvelle philanthropie dans le contexte du système éducatif italien. En effet, à partir de 1996 avec le premier gouvernement de centre-gauche, dirigé par les

ministres Berlinguer puis De Mauro, une intense saison réformatrice a eu lieu en Italie dans le domaine de l'éducation (Ciarini et Giancola, 2016). De plus, dans le premier paragraphe du chapitre, j'examine pourquoi étudier l'investissement social dans la gouvernance de l'éducation en Italie. Aussi, j'analyse quelques particularités du système éducatif italien, comme l'attention pour l'amélioration des compétences et la diminution du décrochage scolaire, deux questions qui sont aujourd'hui urgentes et inévitables.

## **Pourquoi étudier les stratégies italiennes d'investissement social dans la gouvernance de l'éducation?**

En Italie, il y a un manque de recherche sur la participation des acteurs de la nouvelle philanthropie dans la définition des politiques d'investissement social dans l'éducation. Seules quelques études sont conçues dans un cadre national et elles n'analysent pas la façon dont les programmes d'investissement social dans l'éducation sont planifiés dans le contexte politique européen. Ainsi, une meilleure compréhension des stratégies d'investissement social dans l'éducation en Italie dans un cadre européen peut contribuer au domaine de la recherche sur les politiques, sans se limiter au contexte national.

En outre, différentes directions de recherche pourraient être explorées à travers l'étude des stratégies italiennes d'investissement social dans l'éducation. Premièrement, en abandonnant l'idée traditionnelle de recherche sur le système de protection sociale et en s'intéressant aux interventions promotionnelles, une place pourrait être laissée à l'étude des dynamiques d'autonomisation envers les bénéficiaires des services publics (Maino, 2017). Par conséquent, l'étude du contexte italien de l'investissement social dans l'éducation représente une opportunité d'approfondir les mesures envisagées pour l'accessibilité des services éducatifs, pour soutenir la demande et pour l'incubation de nouvelles chaînes d'entreprises liées à l'éducation (Ferrera, 2010).

## **Le «second welfare» impliquant les acteurs locaux du secteur public**

L'Italie de ces dernières années a été caractérisée par la structuration d'une synergie importante entre de nouveaux acteurs privés et des formes innovantes de collaboration et de coordination (Agostini, 2017) dans le cadre de la mise en œuvre de la politique sociale.

Dans ce contexte, le «second-welfare» fait référence à un ensemble d'initiatives d'investissement social non financées par des fonds publics et fournies par des acteurs privés opérant dans des réseaux caractérisés par une forte fixation territoriale. Ces initiatives complètent et intègrent les mesures publiques et les politiques sociales (Maino et Ferrera, 2013). Ainsi, le «second welfare» est un ensemble varié d'interventions qui, offrant un mix de protection et d'investissement social, par l'apport de ressources privées fournies par des acteurs impliqués dans les réseaux territoriaux, entend apporter des réponses à des besoins sociaux non satisfaits. De plus, en Italie, le «second welfare» va progressivement de pair avec le «welfare-state» traditionnel, public et obligatoire (Maino, 2021).



De même, les acteurs du «second welfare» contribuent de plus en plus aux politiques nationales en alimentant l'attention politique et culturelle sur des thèmes spécifiques, en identifiant et en définissant les problèmes, en élaborant des propositions de solutions et en évaluant les interventions (Agostini, 2017).

### **La financiarisation de la protection sociale italienne**

La financiarisation du «welfare state» renvoie à la pénétration dans le monde du «welfare» d'acteurs, de valeurs, de langages, d'outils et de pratiques du monde financier (Caselli et Rucco, 2018). En Italie, ces dernières années, des tentatives ont été faites pour développer de nouveaux instruments financiers dédiés au tiers secteur. De plus, le développement d'une économie alternative à impact social occupe une place de plus en plus centrale dans l'agenda politique. Dans cette refonte des infrastructures de financement des organisations philanthropiques, des instruments spécifiques doivent être considérés (Chiodo et Gerli, 2017).

En effet, des partenariats impliquant des fondations bancaires et des partenariats publics, privés et associatifs, ont donné lieu à des expériences innovantes pour faire face aux défis émergents au niveau local et, dans certains cas, au niveau national. Les fondations bancaires, dans le but de mettre en relation des organisations qui de manière autonome ne collaboreraient pas, voient dans leur capacité à se mettre en réseau le levier pour soutenir l'innovation sociale, entendue comme des actions qui peuvent tracer de nouvelles voies pour aborder les problèmes (Agostini et Cibinel, 2017).

### **La nouvelle gestion publique et les réformes de l'éducation italienne et du «welfare»**

Du point de vue de l'investissement social dans l'éducation, le système de protection sociale italien a été caractérisé ces dernières années par des coupes dans les dépenses publiques dues aux conceptions de la gouvernance et aux choix, pas toujours cohérents, suivis par les différents gouvernements (Ciarini et Giancola, 2016). Dans le système éducatif italien, l'État exerce toujours une influence omniprésente sur les autorités locales et les écoles par le contrôle des ressources humaines et financières et l'exercice de ses pouvoirs réglementaires par la définition de normes et l'octroi d'incitations. Par ailleurs, une faible autonomie scolaire coexiste avec la permanence d'un contrôle centralisé, exercé à travers l'introduction dans le secteur public de logiques de contractualisme et de système de gestion de la performance (Hall et al., 2015).

Ainsi, depuis la fin des années 1990, le système éducatif italien a subi un processus de restructuration. Les jalons d'un tel processus ont été l'instauration de l'autonomie et de la décentralisation des écoles en 1997 et la mise en place contestée d'un système national d'évaluation, du personnel et des élèves. Dans ce contexte, la prédominance de la bureaucratie centrale s'est accompagnée de formes croissantes de contrôle et de gouvernance du champ éducatif, telles que le «managérialisme» et le «partenariat social» (Landri, 2009, p. 87). Cependant, «toutes ces trajectoires sont aujourd'hui encore ambiguës dans leurs dénouements et caractérisées par des tensions et des paradoxes, issues des

affrontements des discours néolibéraux et néomanagérialistes et de leurs technologies avec les héritages welfaristes.» (Barzanò et Grimaldi, 2014, p. 26).

## **Chapitre 5. Politiques d'investissement social pour améliorer l'éducation des enfants et la qualité du système scolaire**

Dans ce chapitre, j'analyse les politiques sociales pour redéfinir l'éducation de la petite enfance et le système éducatif italiens. Comme il ressort des données empiriques présentées au Chapitre 10, ces deux questions revêtent une importance cruciale en Italie.

Je me concentre également sur les récentes mesures italiennes dans le domaine de l'éducation envisagées par le Plan national de relance et de résilience, mise en œuvre dans le cadre des mesures visant à dominer la crise provoquée par l'urgence pandémique, pour créer un nouveau système éducatif garantissant le droit d'étudier pour surmonter tous les types d'inégalités et lutter contre la pauvreté éducative, en réception de la Garantie européenne pour l'enfance dans une optique d'Européanisation.

### **Redéfinir l'éducation de la petite enfance (stratégie de plaidoyer n° 1)**

En Italie, le niveau de décrochage scolaire (la part des élèves qui quittent le système scolaire sans qualification), s'il diminue avec le temps, reste l'un des plus élevés d'Europe avec des différences régionales marquées (Alleanza per l'Infanzia, 2020). Ainsi, malgré quelques réformes importantes, le système éducatif italien semble toujours ancré dans des processus archaïques. Dans ce scénario, la question de l'équité et les phénomènes qui y sont liés, tels que ceux d'abandon, de dispersion et de sous-performance, revêtent dans certains contextes territoriaux une importance particulière (Benadusi et al., 2020).

Le système éducatif italien se caractérise également par des lacunes structurelles dans l'offre d'enseignement primaire. Ainsi, le rapport entre les places disponibles dans les écoles maternelles et le nombre d'enfants âgés de 0 à 2 ans en Italie est en moyenne de 26,9%, avec des différences territoriales importantes. Le manque de services éducatifs pour les enfants, combiné à la répartition inégale des charges de travail familiales, réduit la demande de ces services, générant un équilibre socialement inefficace, où la rareté de l'offre correspond à une réduction apparente de la demande d'offre éducative, en particulier dans le sud.

De plus, le Plan national de relance et de résilience financera 2 190 interventions pour le groupe d'âge de 0 à 6 ans, afin de créer plus de 260 000 nouvelles places pour l'éducation de la petite enfance dans toute l'Italie. Les objectifs de cette intervention sont d'améliorer la qualité du service scolaire italien, de promouvoir l'emploi familial et féminin, d'augmenter le taux de natalité, en particulier dans les régions du sud, d'atteindre d'ici 2026 au moins 33% d'enfants de moins de 3 ans ayant accès aux services de la petite enfance.

## **Améliorer la qualité du système éducatif (stratégie de plaidoyer n° 2)**

Ce paragraphe analyse les récentes mesures prévues par le Plan italien de relance et de résilience pour améliorer la qualité du système éducatif. En plus, les axes d'intervention de la Mission 4 «Education et Recherche» attendus par le plan sont examinés dans le cadre de l'expansion quantitative des services d'éducation et de l'amélioration des processus de recrutement et de formation des enseignants.

L'intervention visant à améliorer la qualité du système éducatif italien dans le cadre du Plan national de relance et de résilience s'appelle Futura - L'école pour l'Italie de demain (La scuola per l'Italia di domani). Son objectif est de garantir le droit aux études et les compétences numériques nécessaires pour faire face aux défis du futur en surmontant tous les types d'inégalités, de pauvreté éducative et de différences territoriales. De plus, les actions envisagées par la mission «Éducation et recherche» fourniront un financement de 30,88 milliards d'euros. Encore, au 10 janvier 2023, le nombre total de projets financés par le Plan national de relance et de résilience dans le domaine de l'éducation en Italie était de 26 810. Aussi, plupart des interventions sont situées dans le centre et le sud de l'Italie.

En outre, le plus grand nombre d'initiatives dans le nord de l'Italie a été réalisé à Milan (3 513), suivie par Venise (2 344) et Parme (1 998). Les domaines d'intérêt de ces projets concernent principalement les technologies numériques et les disciplines STEM, avec une attention particulière à la participation féminine dans la réalisation de chaque activité.

## **La mise en œuvre des politiques italiennes d'investissement social dans l'éducation**

Le paquet d'investissement social mise en œuvre par la Commission européenne dans les dernières années souligne l'importance de l'intervention précoce et des approches préventives dans l'éducation des enfants. Ils demandent donc les pays de l'Union Européenne de: soutenir l'accès des parents au marché du travail; promouvoir l'admission à des services éducatifs de qualité qui sont essentiels à la réussite des enfants; améliorer l'accès à l'éducation et à l'accueil de la petite enfance, y compris pour les enfants de moins de 3 ans; éliminer la ségrégation scolaire; améliorer l'accès à la santé, au logement et aux services sociaux; soutenir la participation des enfants aux activités extrascolaires et aux décisions qui les concernent, telles que les services sociaux et l'éducation (Commission européenne, 2013).

Dans ce contexte, en 2019, la présidente de la Commission européenne, Ursula von der Leyen, a annoncé la mise en œuvre d'une Garantie européenne pour l'enfance, adoptée avec la recommandation y relative le 14 juin 2021, pour garantir que chaque enfant en Europe menacé de pauvreté ou d'exclusion sociale puisse accéder à l'éducation et aux soins gratuits.

Du point de vue de l'Italie, en ce qui concerne la prévention de l'exclusion sociale sur le plan de l'éducation et de la formation, également en tant que réponse coordonnée aux effets de la pandémie du Covid-19, la stratégie nationale promue par le Plan d'action national pour la garantie de l'enfance est la mise en œuvre des pactes communautaires d'éducation dans le cadre de la stratégie Plan scolaire (Piano Scuola) 2022 – 2023, l'initiative de planification des activités d'éducation et de formation de chaque organisation du système éducatif national. Ces accords relient les établissements

d'enseignement, les autorités locales, les organismes publics et privés et les entités du secteur tertiaire pour renforcer l'offre éducative grâce à l'intégration des secteurs public, privé et à but non lucratif.

## **Le processus d'Européanisation**

L'Européanisation est apparue comme un terme dans les études sur l'intégration européenne depuis la fin des années 1990, lorsqu'un virage important dans ce domaine d'étude a permis de découvrir un lien entre les changements dans les politiques nationales et le processus décisionnel et les résultats politiques de l'Union Européenne (Symeonidis, 2021).

Il existe deux manières de conceptualiser les processus d'adaptation en réponse à l'Européanisation (Börzel et Risse, 2000). La logique de l'institutionnalisme rationaliste suggère que l'Européanisation conduit à un changement domestique résultant d'une redistribution des ressources au niveau national. Cette logique traite les acteurs comme rationnels, orientés vers un but et déterminés, engagés dans des interactions stratégiques utilisant leurs ressources pour maximiser leurs utilités sur la base de préférences données et fixes.

Le deuxième mécanisme de conceptualisation des processus d'adaptation nationaux en réponse à l'Européanisation est l'apprentissage produit via les processus de socialisation, dans lequel les décideurs politiques sont conscients de leur interdépendance et peuvent inspirer plus d'engagement envers les objectifs au niveau de l'Union Européenne (Radaelli, 2008). Par ailleurs, depuis le milieu des années 1990, la «société civile» est devenue un acteur à part entière du fonctionnement de l'Union Européenne, permettant de légitimer les institutions qui dialoguent avec elle, les politiques qui la concernent et les agents qui la revendiquent (Michel, 2009).

En plus, en 2000, l'un des principes du nouveau cycle de gouvernance annoncé par la Commission européenne était un partenariat renforcé entre l'Union Européenne et les États membres dans le cadre d'un apprentissage mutuel (entre les États membres et entre les gouvernements et les institutions de l'Union Européenne). Ce mode de gouvernance basé sur l'apprentissage a été identifié avec la Méthode ouverte de coordination lancée par le Conseil Européen de Lisbonne en mars 2000. Dans sa forme idéal-typique, la Méthode ouverte de coordination a un potentiel d'apprentissage de l'Européanisation dans au moins trois directions: apprentissage au niveau de l'Union Européenne au sein des communautés de décideurs politiques engagés dans les processus politiques (ou «apprentissage au sommet»); apprentissage hiérarchique depuis le niveau de l'Union Européenne jusqu'au niveau national et local (ou «apprentissage par le haut»); apprentissage d'en bas (c'est-à-dire les acteurs sociaux, les régions et les gouvernements locaux) vers le haut (ou apprentissage «du bas vers le haut») (Radaelli, 2008).

## **Chapitre 6. Politiques d'investissement social pour le changement éducatif**

Dans ce chapitre, j'e présente différentes politiques européennes et italiennes d'investissement social visant à réaliser un changement éducatif par l'autonomisation des jeunes. Dans le cadre de cette analyse politique, j'examine le «European Pillar or Social Rights» et le Fonds social européen. J'étude également les principales actions financières envisagés par «Recovery and Resilience Facility» et leur impact sur la société européenne et les systèmes éducatifs.

Ensuite, je passe en revue les politiques italiennes promouvant l'investissement social pour la participation des jeunes à la vie démocratique afin de réaliser un changement éducatif. Je souligne comment la mise en œuvre des politiques d'investissement social dans l'éducation en Italie est convenue à l'intersection des secteurs institutionnel, privé et associatif, où les acteurs collaborent pour parvenir à un système éducatif plus participatif. En outre, les exemples d'initiatives présentées dans le premier paragraphe et concernant les activités éducatives promues par les organisations non-gouvernementales (ONG) Ashoka Italia et Teach for Italy et la fondation Learning for Well-being, visant à générer un changement éducatif, confirment comment «à de nombreuses reprises, les relations des acteurs privés se cristallisent dans des coalitions formelles de plaidoyer» (Verger et al., 2017, p. 327).

### **Autonomiser les jeunes pour le changement éducatif (stratégie de plaidoyer n° 3)**

Les sections suivantes présentent des exemples d'actions menées par les organisations de la nouvelle philanthropie, qui font partie du terrain d'étude de cette thèse, pour soutenir le changement éducatif par la participation des jeunes à des initiatives dans les écoles.

Aussi, le paragraphe montrera comment, grâce à l'implication du secteur privé, des réseaux de relations sociales sont établis entre les politiciens, les fonctionnaires et les entreprises qui informent la réflexion politique sur l'éducation (Ball et Youdell, 2008).

### **Teach for Italy poursuit le changement éducatif par le biais de «Changemaker actors»**

Teach for Italy est une organisation à but non lucratif qui travaille à renforcer les écoles publiques italiennes avec des taux élevés de pauvreté éducative. L'organisation fait partie de Teach For All, un réseau international d'éducateurs et d'"acteurs du changement" qui vise à lutter contre les inégalités éducatives dans plus de 60 pays.

L'objectif final de Teach for Italy est de construire un réseau de futurs leaders dans tous les secteurs clés du système éducatif italien pour lutter contre les inégalités. L'organisation a commencé ses activités en 2019 et a lancé la première bourse d'études en 2020. En accord avec le ministère de l'Éducation, elle a créé un "Teach for Italy Schools Network" qui regroupe aujourd'hui une centaine d'écoles en Italie. Pour réaliser sa vision, c'est-à-dire un pays avec des opportunités éducatives égales pour chaque étudiant, Teach For Italy travaille en partenariat avec des entreprises intéressées par l'écosystème

éducatif, pour construire un réseau croissant de partenaires et de donateurs pour soutenir la consolidation de l'organisation.

Enfin, Teach for Italy estime que les étudiants doivent être les protagonistes de leur processus éducatif et de croissance et, pour cette raison, les enseignants proposés par l'organisation travaillent à promouvoir le développement de leurs compétences, afin de permettre aux étudiants d'assumer la responsabilité d'eux-mêmes, de leur apprentissage et de leur avenir.

### **Le monde «Everyone a Changemaker» proposé par d'Ashoka**

Ashoka est une ONG fondée en 1980, qui opère aujourd'hui dans plus de 90 pays. Son objectif principal est de construire une communauté de «Young Changemakers», des personnes qui se considèrent comme capables de créer un changement positif à grande échelle. Encore, les «Young Changemakers» jouent un rôle essentiel dans le mouvement mondial d'Ashoka, en raison de contribuer à l'orientation de la société vers un monde «Everyone a Changemaker», où chaque personne peut participer à un changement positif.

En outre, dans le domaine de l'éducation, le programme Changemaker Schools, promu par Ashoka, considère les écoles comme le cœur de la communauté éducative. Donc, l'ONG estime nécessaire de les ouvrir sur l'extérieur, en établissant des relations durables avec les parents et les associations. À cette fin, le programme Changemaker Schools est actif en Italie depuis 2017, à la suite d'un processus de recherche, de cartographie et de sélection, qui a impliqué 70 experts et 475 écoles. À ce jour, Ashoka a élu 11 «Changemaker Schools» en Italie dans différentes régions, où les acteurs du changement sont les élèves, les familles, les enseignants, les chefs d'établissement et l'ensemble de la communauté scolaire.

### **Learning for Well-being vise la conscience de soi des enfants**

Depuis sa création en 2014, la fondation Learning for Well-being plaide pour le besoin des enfants de participer à la définition du bien-être individuel et collectif. Ces dernières années, en effet, l'approche de la fondation a accordé une attention particulière à la dynamique intergénérationnelle en tant que facteur essentiel pour permettre la participation des enfants à la vie sociale.

Aussi, en 2019, Learning for Well-being a fixé trois objectifs interconnectés pour la période 2020-2022, axés sur la promotion du bien-être et de la participation des enfants, le soutien aux adultes et le renforcement de la capacité de la fondation à mettre en œuvre ses programmes «avec alignement, amour et courage». (Learning for Well-being, 2021, p. 3). En 2021, l'organisation a également amélioré sa compréhension du rôle essentiel des compétences dans la vie et l'apprentissage des enfants. Par conséquent, la fondation a élargi son écosystème de partenariats travaillant sur le développement du bien-être dans les communautés scolaires soutenues par le cadre «Learning for Well-being» (Learning

for Well-being, 2021). Des exemples de projets visant à promouvoir l'apprentissage et le bien-être des enfants sont *ACT2gether World* et *Children as Actors Transforming Society (CATS)*.

*ACT2gether World* propose une approche innovante pour mettre en œuvre la participation des enfants, combinant les perspectives des droits et du bien-être, reconnaissant l'importance des relations intergénérationnelles et combinant transformation personnelle et collective. Cette initiative aspire également à changer la façon dont la société perçoit les enfants et les jeunes, en les positionnant comme des acteurs actifs et, surtout, en créant des espaces où adultes et enfants peuvent collaborer.

*CATS* est un programme mondial qui offre aux enfants et aux jeunes un espace pour échanger des points de vue avec des adultes sur la façon de travailler ensemble pour créer une société plus juste et inclusive où tous peuvent réaliser leurs droits humains fondamentaux et leur potentiel, et aussi transformer la société. Son événement phare, la conférence annuelle *CATS*, propose un programme inclusif, co-conçu et co-dirigé par des enfants et des adultes, qui a réuni au cours de ses trois premières années près de 1 000 enfants, jeunes et adultes de plus de 40 pays. Il s'agit d'une conférence qui rassemble divers groupes engagés dans l'action et la participation des enfants à tous les niveaux de prise de décision. Le groupe de partenaires associés à la conférence comprend des organisations internationales telles que le Conseil de l'Europe, l'UNICEF et Save the Children.

## **Politiques européennes d'investissement social axées sur les jeunes**

La perspective de l'investissement social met en évidence l'émergence de politiques d'éducation et d'accueil de la petite enfance, qui s'ajoutent à une impulsion déjà significative de nombreuses contributions, y compris celles de la Commission européenne (Nolan, 2013). Dans ce contexte, au niveau européen, le 23 février 2022, le Comité des Ministres a adopté la Stratégie relative aux droits de l'enfant (2022-2027), faisant progresser la promotion des droits de l'enfant dans toute l'Europe.

Comme indiqué par la Commission Européenne, les principales parties prenantes impliquées dans les mécanismes et processus visant à faciliter la participation des enfants à la vie politique et démocratique comprennent les organisations publiques internationales et européennes, les autorités gouvernementales aux niveaux national, régional et local (ministères et agences d'État), les organisations de la société civile (présentes aux niveaux international, national et local) et établissements d'enseignement (Commission européenne, 2021a).

## **Chapitre 7. Politiques d'investissement social pour autonomiser les étudiants dans les compétences numériques**

Suite à l'analyse des stratégies de plaidoyer pour l'inclusion sociale dans l'éducation fournie au Chapitre 10, qui considère l'importance de responsabiliser les élèves dans les compétences numériques, dans ce chapitre, j'explore le contexte politique dans lequel ces investissements ont eu lieu.

De plus, après une présentation des politiques européennes sur les technologies inclusives, je me concentre sur les indicateurs de développement des compétences numériques en Italie, soulignant comment les données du rapport 2022 Digital Economy and Society Index (DESI) ont illustré les faibles performances du pays dans le secteur. Ainsi, en Italie, la mise en œuvre conséquente de politiques visant à améliorer le développement des compétences numériques a montré une collaboration entre les ministères, les autorités locales, les organisations universitaires, les instituts de recherche, les entreprises, les consultants, les médias et les associations, démontrant comment la politique est actuellement menée de nouvelles manières, par un large éventail d'acteurs aux formes variées de participation, de relations et d'intérêts impliquant le plaidoyer, les affaires et les nouvelles formes de philanthropie (Junemann et al., 2016).

Enfin, l'analyse fournie dans le chapitre met en évidence comment le manque de compétences numériques, qui touche une partie importante de la population, peut exposer les citoyens à des risques d'exclusion sociale. Par conséquent, de nouvelles interventions aux niveaux national et européen sont nécessaires pour faciliter l'accès aux services numériques afin d'offrir un maximum d'avantages et une évolution éthique de l'utilisation des technologies.

#### **Autonomiser les étudiants dans les compétences numériques (stratégie de plaidoyer n° 4)**

Ce paragraphe met l'accent sur les politiques italiennes en matière d'autonomisation des étudiants et des enseignants dotés de compétences numériques. En particulier, la stratégie nationale pour les compétences numériques est analysée à la lumière des initiatives mises en place par le gouvernement pour réduire l'écart existant avec les autres pays européens et pour contrer l'un des principaux obstacles au développement économique et social du pays, qui est le faible niveau de compétences numériques de base.

Aussi, l'Italie, en retard sur d'autres pays de l'UE en termes de niveau de compétences numériques de base de la population, a élaboré une stratégie nationale, avec la coordination du Département pour la transformation numérique de la Présidence du Conseil des ministres. La stratégie repose sur les principes de l'éducation et de la citoyenneté numériques et exprime la nécessité de donner à l'environnement numérique un espace d'égalité, d'éthique et de non-discrimination.

L'un des principaux instruments de planification mis en œuvre par le gouvernement italien pour améliorer les compétences numériques des élèves est le Plan national école numérique. Le plan se compose de 35 actions réparties en 3 axes d'intervention:

- des outils, qui comprennent des actions visant à doter les écoles de nouveaux environnements d'apprentissage basés sur les technologies numériques pour mettre en œuvre des méthodologies pédagogiques innovantes;
- compétences et contenus, qui sont des actions visant à favoriser le développement de contenus de qualité pour l'enseignement numérique;



- la formation, qui comprend des actions visant à soutenir l'innovation pédagogique et numérique à travers des formations destinées aux personnels de l'école.

Outre les actions du Plan national école numérique, une contribution supplémentaire à l'initiative visant à renforcer les compétences numériques des élèves provient des ressources disponibles dans le cadre du Programme opérationnel national 2014-2020 «Pour l'école - Compétences et environnements d'apprentissage» (Piano Operativo Nazionale 2014-2020 «Per la Scuola - Competenze e Ambienti per l'Apprendimento»). Ce programme offre aux écoles la possibilité d'accéder à des ressources financières européennes et se divise en 4 axes, chacun avec ses propres objectifs spécifiques: «Education», visant à investir dans les compétences et l'apprentissage tout au long de la vie; «Infrastructures pour l'éducation», pour le renforcement des infrastructures scolaires et des dotations technologiques; «Capacité institutionnelle et administrative», concernant la promotion d'une administration publique efficace; «Assistance technique», visant à améliorer la mise en œuvre du programme en renforçant la capacité de gestion des fonds.

### **Politiques de l'Union Européenne pour une Société de l'information inclusive**

Ce paragraphe examine les politiques visant à donner aux citoyens les moyens d'acquérir des compétences numériques, en mettant l'accent sur les interventions visant à poursuivre l'inclusion sociale par la création de la Société européenne de l'information.

Le paragraphe détaille également les actions mises en œuvre par la récente Déclaration européenne sur les droits et principes numériques, visant un changement numérique centré sur l'humain grâce à l'autonomisation des citoyens, afin de leur permettre de profiter des opportunités offertes par les technologies numériques, telles que la participation à l'espace public numérique.

En effet, la société contemporaine est de plus en plus gérée selon des lignes numériques. Dans de nombreuses régions du monde, les gens mènent des vies conditionnées par un éventail de systèmes et d'appareils numériques (Selwyn, 2017). En effet, la société de l'information peut être définie comme le modèle émergent de développement socio-économique, reflétant les changements qualitatifs dans l'organisation des activités humaines, qu'elles soient professionnelles, privées ou institutionnelles, dus à l'évolution continue des technologies de l'information et de la communication. C'est à dire, les évolutions technologiques et économiques ont fait passer la société de l'ère «industrielle» à celle de «l'information», qui se caractérise par les progrès rapides des technologies numériques et l'accélération de la mondialisation économique (Parlement Européen, 2003).

Dans ce contexte, l'e-inclusion, c'est-à-dire l'inclusion dans l'environnement numérique, souligne la nécessité pour chacun de s'engager activement dans la société, grâce à un accès abordable aux technologies, à la convivialité des outils, services et compétences des technologies de l'information et de la communication. L'inclusion numérique peut également offrir des avantages tangibles aux citoyens, tels que l'amélioration des compétences, une meilleure qualité de vie et un meilleur accès à l'information et à l'engagement dans les questions publiques, grâce à la participation électronique. Cependant, elle

peut capitaliser sur les compétences inutilisées et stimuler la créativité des jeunes marginalisés (Commission européenne, 2007b).

Ensuite, dans la communication de la Commission européenne intitulée European i2010 initiative on e-Inclusion. To be part of the information society (Commission européenne, 2007a), l'e-inclusion est également définie comme des actions visant à parvenir à une société de l'information inclusive, c'est-à-dire une société de l'information pour tous. L'objectif de la communication est de mettre en œuvre une stratégie numérique permettant à toute personne qui souhaite participer à la société de l'information, quels que soient les désavantages individuels ou sociaux.

En conséquence, la Commission européenne a mis en place un agenda pour structurer les opportunités tirées de l'évolution numérique dans l'éducation. Ce programme a impliqué les parties prenantes, telles que les établissements d'enseignement, les décideurs politiques, le secteur de l'apprentissage, les enseignants, les parents et les enfants, à travers une série d'actions concrètes: des environnements d'apprentissage et des ressources éducatives ouverts; connectivité; actions concertées. En poursuivant ces objectifs, la Commission a appelé à ce que les systèmes éducatifs soient accessibles et offrent des chances égales à tous, quelle que soit l'origine de chacun (Commission européenne, 2016).

De plus, parmi les dernières initiatives de la Commission européenne (2018) dans le domaine de la numérisation de l'éducation, le premier plan d'action pour l'éducation numérique a été publié en janvier 2018, axé sur: «la mise en œuvre et sur la nécessité de stimuler, de soutenir et d'étendre l'utilisation ciblée des pratiques éducatives numériques et innovantes.» (p. 4). Le plan s'appuie sur un large éventail d'acteurs de l'éducation et de la formation impliquant des connectivités politiques, financières, technologiques et sociales (Junemann et al., 2016).

Récemment, dans le contexte de la transformation numérique de l'Union Européenne, la Déclaration européenne sur les droits numériques et les principes de la décennie numérique a été mise en œuvre pour garantir que les citoyens soient en mesure de profiter des opportunités offertes par la «décennie numérique». La déclaration a été signée par les présidents du Parlement européen, de la Commission et du Conseil en décembre 2022, reflétant un engagement politique commun en faveur du changement numérique.

### **La stratégie italienne pour les compétences numériques**

En Italie, le Plan national de relance et de résilience s'élève à 191,5 milliards d'euros, dont 25,1% (48 millions d'euros) ont été affectés à la numérisation (Commission européenne, 2022). Aussi, le Fonds pour une République Numérique construit des réseaux animés par des relations diverses et échanges afin de favoriser des initiatives dans le domaine de l'éducation numérique. Dans le contexte de l'implémentation de ces mesures, le financement est fondamental mais, d'une autre manière, les accords entre différents types d'acteurs des secteurs philanthropique et institutionnels sont également centraux (Junemann et al., 2016) pour la promotion de chaque initiative.

Ces accords rassemblent un large éventail d'ONG, d'associations de citoyens et de syndicats dans des formes d'activisme qui ciblent les institutions et les problèmes au niveau global tout en essayant d'utiliser la visibilité au niveau mondial pour obtenir des changements au niveau national (Mundy et Murphy, 2001). Par ailleurs, les réformes et les investissements associés aux objectifs attendus comprennent:

- promouvoir la numérisation des écoles à travers l'initiative appelée École 4.0 (Scuola 4.0);
- améliorer la formation professionnelle, avec la réforme du système de formation professionnelle tertiaire de l'Institut Technique Supérieur;
- renforcer le système de recherche, qui pourrait couvrir des domaines tels que la simulation avancée, le big data, l'industrie 4.0 et l'intelligence artificielle.

## **Chapitre 8. Stratégies d'investissement social dans les réseaux éducatifs européens**

Ce chapitre aborde les détails de l'approche méthodologique, avec certaines de ses limites. En plus, il démontre la valeur de l'utilisation d'une approche ethnographique pour rechercher les processus de gouvernance de l'éducation, car elle a fourni le type de collecte de données nécessaire. Par conséquent, les études de cas et les ethnographies illustrées dans cette recherche présentent divers avantages. Premièrement, les approches ethnographiques ont capturé les aspects financiers des organisations étudiées qui étaient importants parce que les ressources financières constituaient un domaine d'intérêt. Deuxièmement, cette approche a également recueilli des données détaillées sur les aspects informels de la gouvernance de l'éducation au moyen d'entretiens. Cependant, il y avait des limites: des procédures d'investissement social n'étaient pas enregistrables en raison de la nature informelle des échanges. En fait, certains processus se sont déroulés dans des domaines spécifiques tels que les audiences, les consultations et la participation à des groupes de travail.

### **Nœuds centraux**

Les réseaux de politique éducative peuvent être théorisés comme des réseaux d'organisations composés de nœuds centraux et d'acteurs limitrophes. Ces réseaux sont bâtis sur des partenariats entre de telles organisations, et sont capables de générer des relations entre philanthropes, pouvoirs publics et entreprises à travers des appels à subventions, des consultations, des auditions et la participation à des groupes de travail.

De même, les nœuds centraux dans ces réseaux doivent être vus dans leur contexte socio-politique car ils sont en mesure d'aider les organisations «mineures» à surmonter les obstacles à l'obtention de fonds pour leurs initiatives dans le domaine de l'éducation, par exemple en soutenant les candidatures aux appels à subventions de la Commission Européenne. Au sein des réseaux de politiques éducatives analysés dans cette étude, ce sont souvent les nœuds centraux qui ont produit le plus d'investissements

sociaux à travers la recherche de partenariats, la participation à des initiatives vertueuses, le soutien de projets et la mise en œuvre d'activités de collecte de fonds.

Les nœuds centraux peuvent également être discutés en termes d'utilité. En effet, les fondations, par exemple, sont particulièrement appropriées dans les réseaux de politique éducative axés sur les investissements sociaux pour être engagées au niveau national et européen et impliquées dans les aspects communautaires de la gouvernance de l'éducation en même temps.

### **Acteurs frontières**

Les données présentées dans cette thèse suggèrent qu'une grande partie des organisations de la nouvelle philanthropie fonctionnent comme des acteurs frontières, et qu'il doit y avoir des acteurs frontières dans différents groupes et niveaux d'un réseau, en raison de leur pouvoir de relier les organisations et de permettre à des nœuds «mineurs» d'accéder aux fonds et au contexte politique.

Aussi, certaines organisations de la nouvelle philanthropie au sein des réseaux de politique éducative examinés étaient fondamentales pour les processus d'investissement social, en tant qu'acteurs poursuivant leurs propres activités et reposant sur des relations et des objectifs philanthropiques spécifiques. Il s'agit d'organisations frontières qui ont tendance à être des acteurs des réseaux de gouvernance de l'éducation avec des caractéristiques particulières.

Ils opèrent également de nombreuses manières, façonnant les réseaux d'investissement social dans l'éducation en créant des ponts entre différentes organisations de la nouvelle philanthropie et les zones périphériques de ces réseaux, en fournissant des ressources de communication et financières et des stratégies de plaidoyer.

### **Implications de l'investissement social dans l'éducation**

Ce paragraphe définit trois implications sur l'investissement social dans l'éducation au sein des réseaux de la nouvelle philanthropie, sur la base des résultats présentés dans les deux chapitres suivants. En plus, ces implications visent à donner un sens à l'enquête empirique, bien que certaines questions restent à aborder et à débattre davantage.

La première implication porte sur l'évolution des priorités des organisations de la nouvelle philanthropie dans la gouvernance mondiale de l'éducation et prend en compte les nouveaux processus en éducation introduisant de nouveaux acteurs, pratiques, opportunités et autorités dans l'éducation du secteur public. La deuxième implication met en évidence la pertinence croissante des fonds de capital-risque dans les réseaux d'investissement social en éducation. En fait, les nouveaux philanthropes apportent des investissements financiers de la philanthropie d'entreprise, ce qui brouille la distinction entre les secteurs public, bénévole, philanthropique et à but lucratif. La troisième implication illustre la définition mutuelle des priorités entre les nouveaux acteurs philanthropiques et les décideurs politiques de

l'éducation, qui demandent aux entreprises philanthropiques de travailler avec les gouvernements pour résoudre les problèmes éducatifs.

### **Première implication: le développement des nouvelles priorités des organisations philanthropiques dans la gouvernance européenne de l'éducation**

Au cours des dernières décennies, des organisations de la nouvelle philanthropie ont commencé à être davantage intégrées dans la gouvernance européenne de l'éducation grâce au rôle croissant et significatif que l'activité philanthropique a joué dans les processus de modernisation du secteur public. Dans ce contexte, la philanthropie est un facteur contribuant aux processus et aux discours de changement de la gouvernance de l'éducation, qui a servi à valider et à diffuser de nouvelles pratiques dans l'infrastructure de prestation de services publics. Cependant, la philanthropie a joué un rôle symbolique et stratégique particulièrement important, offrant une alternative «acceptable» à l'État en termes de légitimité morale (Ball et Juneamann, 2012). Dans ce scénario, les entreprises contribuent régulièrement aux conversations sur l'éducation mondiale et aux débats souvent réglementaires sur des questions majeures (Menashy et al., 2019).

### **Deuxième implication: l'importance croissante du capital-risque dans la gouvernance européenne de l'éducation**

Les nouveaux philanthropes veulent «rendre» ce qu'ils ont généré sous forme de profit de leurs entreprises. Cependant, ils veulent utiliser leurs dons de manière professionnelle comme des «investissements» avec de bons rendements. En effet, les nouvelles initiatives politiques attirent des participations financières des entreprises et la philanthropie d'entreprise (capital-risque) et produisent de nouveaux types d'organisations et de relations organisationnelles. (Ball, 2012).

De plus, selon McGoey, le philanthrocapitalisme est «la tendance d'une nouvelle race de donateurs à confondre les objectifs commerciaux avec les efforts caritatifs» (McGoey, 2012, p. 185). Ainsi, la nouvelle tendance du philanthrocapitalisme a permis à une croissance de l'autorité privée de guider la trajectoire des politiques et programmes mondiaux de financement de l'éducation (Menashy et al., 2019).

### **Troisième implication: la définition partagée des priorités éducatives entre les nouveaux acteurs philanthropiques et les décideurs politiques en éducation**

Le rôle des entreprises dans la conception des politiques a fait l'objet d'un débat plus large concernant la légitimité et les qualifications des acteurs privés pour diriger et souvent dicter la politique sociale. Dans ce contexte, les réseaux politiques constituent des communautés de discours, dans lesquelles la philanthropie est intégrée et sont invitées à travailler avec le gouvernement ou des agences ou dans

des partenariats de divers types pour tenter de résoudre des problèmes sociaux et éducatifs insolubles et «méchants» (Ball et Junemann, 2012).

Aussi, un exemple de la relation dialectique entre les organisations de la nouvelle philanthropie et les décideurs politiques pour définir les priorités en matière d'éducation est la rencontre avec des partenaires avec lesquels créer une demande sociale en vertu de la confiance et de valeurs partagées.

## **Chapitre 9. Stratégies d'investissement social dans les réseaux éducatifs numériques**

Dans ce chapitre je retrace les résultats concernant le premier objectif de la recherche. L'un des deux objectifs de l'étude était d'enquêter sur les réseaux européens d'éducation numérique dans lesquels des organisations de la nouvelle philanthropie s'impliquent avec des acteurs publics et privés. Par ailleurs, comme le montre la revue de la littérature sur les nouveaux acteurs philanthropiques de l'éducation européenne, les entreprises Ed-Tech jouent aujourd'hui un rôle central dans la mise en œuvre de stratégies d'investissement social. Par conséquent, le chapitre cherche à répondre à l'hypothèse liée au premier objectif de la recherche: les organisations de la nouvelle philanthropie promeuvent-elles l'investissement social dans l'éducation européenne à travers les réseaux éducatifs numériques dans lesquels elles sont intégrées?

De même, afin d'étudier le premier objectif de la thèse et de confirmer ou d'infirmer l'hypothèse associée, je présente une analyse de données basée sur des entretiens et me concentre sur l'exploration de récits visuels affichés à travers le logiciel Gephi, qui est un «software open source» d'analyse de réseau (Bastian et al., 2009). Ainsi, différentes cartographies concernant les organisations de la nouvelle philanthropie axées sur l'éducation numérique et leurs liens avec les acteurs publics et privés sont présentées dans le respect des dimensions topologiques de l'analyse visuelle.

### **Collecte des données**

Afin d'analyser les réseaux européens d'éducation numérique dans lesquels s'impliquent d'organisations de la nouvelle philanthropie avec des acteurs publics et privés et les stratégies d'investissement social qu'elles adoptent au sein de ces réseaux, un «design» méthodologique a été créé pour identifier différentes relations financières et sociales entre les différents acteurs. Aussi, ce modèle consiste en une analyse détaillée des stratégies d'investissement social dans l'éducation numérique, qui sera rapportée dans les paragraphes suivants à travers une explication à la fois visuelle et écrite. Pour ce faire, 32 personnes issues de 21 organisations de natures diverses ont été interrogées sur les relations de l'organisation dont elles font partie avec les acteurs publics et privés et sur les stratégies d'investissement social mises en œuvre par ces organisations. Aussi, les transcriptions des

entretiens avec de nouveaux philanthropes impliqués dans l'éducation numérique ont été analysées en fonction de la question de recherche et des hypothèses de cette étude.

### **Visualisation des données**

La phase de visualisation a débuté par l'analyse de chaque retranscription d'entretien pour identifier les différentes relations entre les acteurs de la nouvelle philanthropie axées vers l'éducation numérique. Ensuite, les réseaux résultants ont été visualisés à l'aide de l'outil de manipulation de graphes Gephi. Chaque graphe présenté dans ce chapitre est constitué de nœuds qui relient les acteurs et d'arêtes qui visualisent les interactions entre ces acteurs. De plus, la forme des différents graphes a été obtenue par un algorithme basé sur la force appelé Force Atlas, capable de construire un réseau de nœuds et d'arêtes basé sur l'attraction entre les nœuds connectés et la répulsion des nœuds non connectés.

### **Analyse des données**

L'analyse a identifié un réseau de 140 nœuds et un total de 154 connexions. Dans la présentation de l'analyse des données, une introduction aux réseaux éducatifs numériques italiens est fournie dans le chapitre, accompagnée d'une présentation des nœuds occupant son centre et ses zones marginales. Encore, une attention particulière est adressée aux organisations connectées au noyau central, composé des nœuds les plus visibles. Ce groupe central, des organisations collectrices entourées d'acteurs plus ou moins interconnectés, sera analysé plus en détail, avec quelques comparaisons entre les différents nœuds qui le constituent. Puis, certains «petits» réseaux seront également identifiés en fonction de la dimension et du type des organisations qui les composent. Enfin, une classification des groupes thématiques sera introduite, liée aux objectifs de recherche et aux hypothèses. En résumé, l'analyse des données sera développée selon les groupes suivants: distribution, type d'organisation, stratégie d'investissement social, stratégie d'investissement dans l'éducation numérique. Les groupes d'analyse des données sont présentés dans le Tableau 1.

**Tableau 1. Groupes d'analyse de données**

<b>Groupes</b>	<b>Caractéristiques</b>	<b>Visualisation</b>
<b>Distribution</b>	Position des acteurs les uns par rapport aux autres dans le réseau	Nœuds interconnectés positionnés à proximité les uns des autres et représentés dans la même couleur (Figure 1)
<b>Type d'organisation</b>	Catégorie d'acteurs (fondations, associations, coopératives, entreprises sociales, ONG, associations, think tanks, etc.)	Acteurs du même type affichés dans la même couleur
<b>Stratégie d'investissement social</b>	Acteurs visant à trouver des solutions aux besoins sociaux, sur la base de l'évaluation d'un modèle économique «intéressant»	Nœuds connectés directement ou via des acteurs frontières
<b>Stratégie d'investissement dans l'éducation numérique</b>	Organisations axées sur des projets visant principalement à combler le déficit de compétences numériques et à améliorer les méthodes d'enseignement et d'apprentissage	Acteurs connectés pour leur attention sur la mise en place de technologies éducatives ou sur le développement de projets ensemble

### **Dynamique des réseaux des organisations italiennes de la nouvelle philanthropie**

Afin de vérifier la première hypothèse de la recherche, certains nœuds et leurs connexions au sein des réseaux italiens sur l'éducation numérique ont été analysés grâce aux informations fournies par les employés des organisations de la nouvelle philanthropie lors d'entretiens semi-structurés.

Comme l'affirment Mackenzie et Lucio (2015), les acteurs opèrent sur la base d'une diversité de liens, qui peuvent être des relations formelles et contractuelles entre acteurs. Ces connexions formels peuvent inclure une «licence d'État», des contrats, des conventions collectives, des formes de partenariats et de collaborations entre les acteurs sociaux. Néanmoins, ces liens peuvent également être représentés par des «mécanismes complexes de tolérance et d'accommodement qui peuvent ne pas être formellement articulés» (Mackenzie et Lucio, 2015, p. 19). De plus, la dynamique de l'investissement social dans la gouvernance de l'éducation numérique italienne mise en évidence par les répondants est illustrée dans le Tableau 2.



**Tableau 2. Dynamique des réseaux d'investissement social dans la gouvernance italienne de l'éducation numérique**

<b>Dynamique de réseau de l'investissement social</b>	<b>Types d'activités</b>
<b>Engager avec les gouvernements dans les programmes éducatifs</b>	Conclure des contrats de subventions avec les régions, les communes et les mairies
<b>Accéder aux plus hauts niveaux d'activité politique</b>	Structurer des partenariats avec le ministère de l'Éducation nationale au niveau national et local (directions scolaires régionales et provinciales)
<b>Travailler en vertu de la confiance et de valeurs partagées</b>	Faire du réseautage et rencontrer des partenaires avec qui créer une demande sociale en accord avec la vision de l'organisation
<b>Agir en tant qu'acteurs de «l'eduspace»</b>	Identifier les fonds d'investissement ou les ressources financières dont le projet a besoin
<b>Investir en capital-risque, financement stratégique, prise de risque et « mise à l'échelle » de prototypes réussis</b>	Conserver un modèle expérimental et performant basé sur des fonds privés et le partager au niveau national et européen

### **Étudier les stratégies d'investissement social dans les réseaux éducatifs numériques**

Afin de confirmer ou d'infirmer la première hypothèse de la recherche, l'analyse empirique fournie dans ce chapitre introduit un travail de terrain italien pour comprendre si les stratégies d'investissement social dans l'éducation mises en œuvre par des organisations de la nouvelle philanthropie sont favorisées par les réseaux éducatifs numériques dans lesquels les acteurs sont impliqués. Conformément à l'analyse des données, cette hypothèse est confirmée. Cependant, il est important de souligner que les organisations de la nouvelle philanthropie analysées dans cette étude sont principalement connectées au niveau local et national qu'au niveau européen. Les données de ce paragraphe visualisent les relations entre les acteurs de la nouvelle philanthropie italiens axés sur les investissements sociaux et l'éducation numérique, selon les «clusters» décrits ci-dessus.

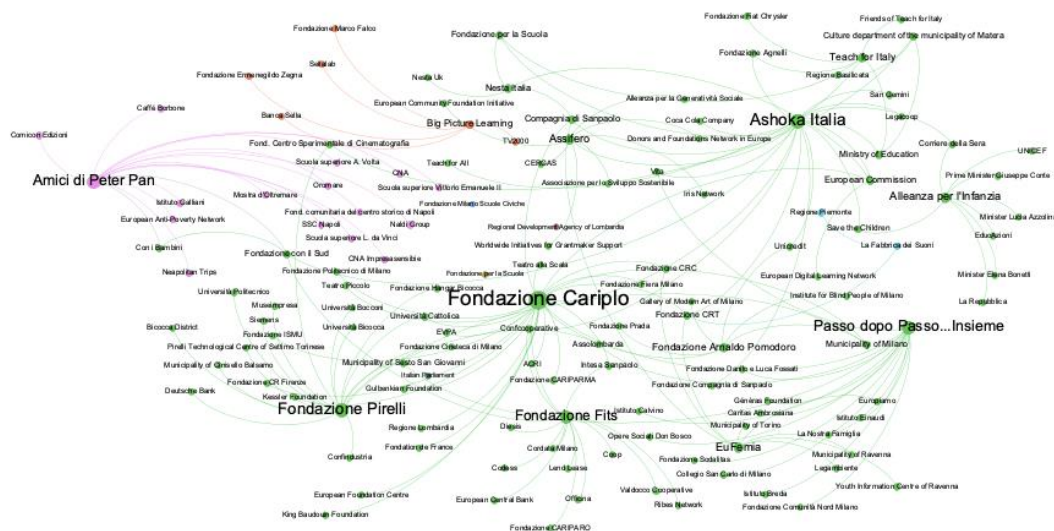
**Tableau 3. Dimensions topologiques de l'analyse visuelle des acteurs de la nouvelle philanthropie italienne classés par distribution**

Dimensions	Caractéristiques	Représentation visuelle
<b>Centres</b>	Fondations privées et bancaires	«Hubs» garantissant les connexions du réseau
<b>Frontières</b>	Fondations privées et caisses d'épargne	Organisations participant à des réseaux thématiques (par exemple, l'inclusion sociale) et reliant les acteurs entre eux
<b>Marges</b>	Associations, entreprises sociales, coopératives, organisations bénévoles	Des acteurs marginaux interconnectés entre eux par des relations périphériques et constituant des communautés thématiques

### Visualisation du réseau par distribution

La figure 1 comprend des nœuds et des arêtes concernant un réseau italien d'investissement social composé d'organisations de la nouvelle philanthropie axées sur l'éducation numérique. En effet, à partir de la base de données en ligne Italia non profit, l'analyse a identifié 15 organisations de la nouvelle philanthropie donnant lieu à un réseau de 140 nœuds et 154 connexions. Un tel réseau a une structure relativement centralisée, et le centre est principalement occupé par des fondations.

**Figure 1. Réseau italien d'éducation numérique affiché par distribution**



Dans le réseau, les organisations connectées les unes aux autres sont représentées de la même couleur. Le réseau présente un degré moyen (le nombre de connexions de chaque organisation avec les autres) de 2.216: le cluster central est composé de fondations (Fondazione Cariplo, Fondazione Pirelli, Fondazione Fits) et est entouré d'acteurs isolés, comme le think tank Alleanza per l'Infanzia et la coopérative Big Picture Learning. Il est également possible d'identifier des groupes plus ou moins interconnectés, par exemple ceux impliquant les ONG Ashoka Italia et Teach for Italy, liées par la Fondazione Agnelli (fondation d'entreprise) en haut à droite du graphique, l'association Amici di Peter Pan et le l'entreprise sociale Con i Bambini à gauche sur l'image, et l'association Eufemia, la Fondazione Cariplo, la fondation Nesta Italia et Ashoka Italia reliées par la Compagnia di Sanpaolo (fondation de la banque Intesa Sanpaolo) en haut au centre.

En outre, la relation entre les acteurs connectés est généralement médiatisée par des fondations bancaires, telles que la Fondation de la Caisse d'épargne de Turin, la Fondation de la Caisse d'épargne de Cuneo, la Fondation UniCredit et la Compagnia di Sanpaolo. Ces fondations sont capables de relier différentes organisations de la nouvelle philanthropie: Fondazione Cariplo, Fondazione Pirelli, Fondazione Fits, Fondazione Arnaldo Pomodoro, Nesta Italia, Eufemia, la coopérative La Fabbrica dei Suoni, Passo dopo Passo...Insieme, l'association Amici di Peter Pan, Ashoka Italia et Teach for Italy.

Aussi, pour ce qui concerne le niveau européen, il est montré que quatre acteurs sont directement liés à la Commission européenne. Il s'agit de: Fondazione Cariplo, Nesta Italia, Ashoka Italia et l'association European Digital Learning Network. Alors que, d'après les informations fournies par les personnes interrogées, d'autres acteurs plus petits sont déconnectés de la dimension européenne. Enfin, la figure 1 est une représentation partielle des relations entre les organisations de la nouvelle philanthropie italiennes axées sur l'éducation numérique. En effet, elle n'énumère pas toutes les connexions possibles entre eux, mais elle peut être considéré comme un indicateur des interdépendances entre les différents acteurs qui composent le réseau italien d'éducation numérique analysé dans cette étude.

### **Étude de cas: Fondazione Cariplo**

Comme mentionné dans l'introduction de ce chapitre, l'un des objectifs de l'étude est d'enquêter les réseaux éducatifs numériques, en ce qui concerne les connexions et l'engagement stratégique des acteurs. De même, le paragraphe aborde cet objectif en analysant la Fondazione Cariplo dans les caractéristiques financières de son réseau, mais aussi dans la manière dont les acteurs publics et privés sont engagés dans son réseau éducatif numérique.

Il convient de noter que les résultats présentés ici s'appuient sur une dynamique de réseau à une étape particulière de la stratégie d'investissement social de la Fondazione Cariplo, qui concerne les dernières années, plutôt que de constituer un panorama depuis la constitution de l'organisation.

En résumé, cinq stratégies d'investissement social dans l'éducation numérique peuvent être identifiées grâce aux informations fournies dans les entretiens et qui sont présentées dans le Tableau 4.

**Tableau 4. Les stratégies d'investissement social de la Fondazione Cariplo et les activités connexes**

Stratégies d'investissement social	Activités
<b>Analyser les opportunités</b>	Attraper un besoin sur le territoire, pouvant s'exprimer directement, au travers d'enquêtes pour la vue ou d'études menées par la fondation
<b>Définir un plan de faisabilité</b>	Grâce à des enquêtes et des études, identifier une opportunité d'investissement, qui peut avoir une rechute sur le territoire et peut être mise en œuvre dans de nouveaux programmes
<b>Examiner les tendances et les scénarios</b>	Regarder ce que font les autres fondations ou écouter les instituts de recherche, les institutions politiques et les groupes de réflexion
<b>Identifier des modèles d'intervention</b>	Atteindre des résultats quantitatifs dans la promotion d'embryons de politiques d'intervention à mettre en œuvre en accord avec les institutions
<b>Contextualiser les initiatives au sein de projets supérieurs</b>	Non seulement offrir la technologie pure, mais considérer l'instrumentation comme un catalyseur pour d'autres initiatives

En ce qui concerne l'implication dans les réseaux éducatifs numériques, un rôle de premier plan est joué par l'entreprise de bénéfice de la Fondazione Cariplo appelée Cariplo Factory. Elle est composée de l'unique actionnaire Fondazione Cariplo et, comme déclaré dans son statuts, entend développer un écosystème orienté vers l'innovation et visant à activer les collaborations et les synergies entre investisseurs en capital-risque, entreprises traditionnelles, entreprises de haute technologie, environnements éducatifs informels, entreprises sociales, universités, centres de recherche, écoles et institutions de formation.

Ainsi, la société Cariplo Factory peut être considérée comme un «pôle d'innovation» qui fournit des investissements en capital, des cours et des programmes de soutien à l'entrepreneuriat en suivant les valeurs de compétitivité, d'inclusivité et de co-conception de projets et en consolidant une approche éthique du pluralisme des idées et de la protection des communautés vulnérables.

## **Chapitre 10. Pratiques de plaidoyer dans la gouvernance européenne de l'éducation**

Ce chapitre explore le deuxième objectif de la recherche, qui consiste à étudier comment les organisations de la nouvelle philanthropie mobilisent leurs ressources financières afin de plaider en faveur de l'éducation. Par conséquent, la deuxième hypothèse de la thèse relative à cet objectif est:

d'acteurs de la nouvelle philanthropie donnent la parole à un large éventail de groupes de plaidoyer pour l'inclusion sociale en éducation en mobilisant leurs ressources. De plus, la deuxième hypothèse concerne la composante «financement» de la relation entre le marché de l'éducation et la société.

Le chapitre analyse également les stratégies que les organisations de la nouvelle philanthropie adoptent pour faire avancer leur agenda dans la définition des politiques éducatives en Italie. Une description a pareillement été fournie de la manière dont les pratiques de plaidoyer en matière d'éducation ont été mises en œuvre, comment elles ont été structurées et comment les facteurs financiers ont façonné certaines des dynamiques de plaidoyer qui ont eu lieu.

Aussi, les données confirment que les ressources mobilisées par les acteurs de la nouvelle philanthropie ont été importantes dans la promotion des pratiques de plaidoyer éducatif, donnant la parole à un large éventail d'étudiantes, de familles et de communautés ayant besoin d'un système éducatif de qualité.

### **Pratiques de plaidoyer en matière d'éducation des organisations de la nouvelle philanthropie italienne**

Selon la deuxième hypothèse de la recherche, afin d'identifier comment le plaidoyer pour l'inclusion sociale dans l'éducation prend naissance en Italie, j'e présente quatre pratiques caractéristiques des modes de relation spécifiques dans le plaidoyer pour l'éducation par les organisations de la nouvelle philanthropie (redéfinir l'éducation de la petite enfance, promouvoir la qualité dans l'éducation, poursuivre le changement éducatif et autonomiser les étudiants dans les compétences numériques) qui se déroulent dans le contexte de la refonte de l'État, marché et philanthropie qui ont émergé au cours de l'enquête empirique. Pour analyser le deuxième objectif de l'étude, je me concentre sur l'inclusion sociale comme thème central des actions de plaidoyer et émergeant à travers des entretiens avec des employés d'organisations de la nouvelle philanthropie. En effet, de nos jours, «des philanthropies de toutes sortes assument les responsabilités morales de l'État articulées au sein d'une architecture globale complexe de relations économiques et sociales.» (Avelar et Ball, 2017, p. 1).

Ainsi, contribuer à l'élaboration des politiques ou faire ce que les nouveaux philanthropes appellent souvent le plaidoyer devient non seulement une partie des activités de la philanthropie, mais aussi un objectif central. En effet, les fondations influentes décrivent de plus en plus le plaidoyer comme un élément crucial de leur activité et le mentionnent souvent comme un trait distinctif de leur travail par opposition aux anciennes façons de «donner». De plus, bien qu'à but non lucratif, le travail de la nouvelle philanthropie dans les politiques d'éducation favorise la confusion entre public et privé, et entre non lucratif et lucratif.

Donc, comme on peut le voir dans le Tableau 5, diverses activités liées à la promotion de l'éducation italienne sont menées par les organisations de la nouvelle philanthropie dans des réseaux hétérarchiques impliquant des partis politiques, des médias, des écoles publiques et des partenaires, et sont construites à l'occasion d'appels de subventions ou de demandes des fonctionnaires de la Commission européenne pour avis techniques. Ces réseaux hétérarchiques sont capables d'introduire

de nouvelles «voix» dans le récit de l'éducation à travers des consultations, des auditions et la participation à des groupes de travail afin de représenter les besoins éducatifs de différents groupes ou communautés.

**Tableau 5. Stratégies de plaidoyer hétérarchiques pour participer à l'élaboration des politiques en matière d'éducation**

<b>Stratégies de plaidoyer hétérarchiques pour participer à l'élaboration des politiques d'éducation</b>	<b>Types d'activités</b>
<b>Gérer les partis et les situations politiques</b>	Changer le discours sur l'éducation en argumentant avec les partis politiques pour faire entendre les élèves, les parents et les enseignants
<b>Demander aux médias s'ils sont intéressés par une initiative spécifique</b>	Maintenir le contact avec les journaux intéressés par une initiative spécifique de plaidoyer en matière d'éducation
<b>Collaborer avec les écoles publiques</b>	Accueillir les étudiants qui ne réussissent pas dans leur parcours académique et augmenter les inscriptions par le «bouche à oreille»
<b>Postuler aux appels à subventions avec les partenaires</b>	S'impliquer dans les réseaux qui se construisent pour passer les appels à subventions et leur phase complexe de «reporting»
<b>Faire partie de réseaux avec des organisations européennes et internationales</b>	Participer à des consultations, des auditions et des groupes de travail sur des dossiers ouverts sur l'éducation avec des fonctionnaires de la Commission européenne demandant des avis et des conseils techniques

### **Limites et orientations futures de la recherche**

Il existe des aspects plus larges du pouvoir dans le contexte de la politique de l'éducation que je n'ai pas pu aborder pour des raisons d'espace. Je ne pourrais pas développer mon analyse dans cette direction et je la considère plutôt comme un développement nécessaire de mes recherches futures. Un aspect important à investiguer est, en effet, représenté par les dynamiques de pouvoir concernant à la fois les organisations de la nouvelle philanthropie et les décideurs politiques qui projettent les politiques éducatives. De plus, selon Ball (2012, p. 25), dans les systèmes éducatifs, «l'argent est synonyme de pouvoir à bien des égards: le pouvoir de faire avancer les choses – construire des écoles, lancer des programmes, payer des bourses et le pouvoir d'établir des partenariats avec les gouvernements dans la résolution des problèmes sociaux et le pouvoir de parler et d'adopter des politiques, parfois au-delà de la volonté des gouvernements, dans les arènes locales et transnationales.»

De futures orientations de recherche pourraient également étudier les dynamiques de l'éducation et de l'accueil de la petite enfance telles que les questions connexes du coût d'accès aux jardins d'enfance et aux écoles maternelles, la mise en œuvre de politiques d'équilibre entre vie professionnelle et vie privée des parents et l'offre de formations pour que les parents comprennent comment éduquer leurs enfants pour apporter un changement positif dans la société ont été présentés comme fondamentaux par certaines des personnes interrogées.

### **Acteurs dans l'«Eduspace»**

Dans cette section, les organisations composant un réseau italien de plaidoyer en éducation sont présentées. Le graphe se compose de 109 nœuds et 122 connections. Le centre est occupé par des organisations de différents types: la Fondation Cariplo, l'ONG Ashoka Italia et l'association Passo dopo Passo...Insieme. Une particularité intéressante du réseau italien de plaidoyer en matière de l'éducation est l'importance assumée par les organisations directement liées au ministère de l'Éducation, telles que les ONG Teach for Italy et Ashoka Italia et le think tank Alleanza per l'Infanzia. De plus, les fondations bancaires semblent être tout aussi influentes dans le système de plaidoyer italien. Non seulement plusieurs fondations bancaires sont impliquées dans des activités de plaidoyer, mais elles mettent en relation écoles, pouvoirs publics et organisations de la nouvelle philanthropie dans la valorisation des pratiques de plaidoyer.

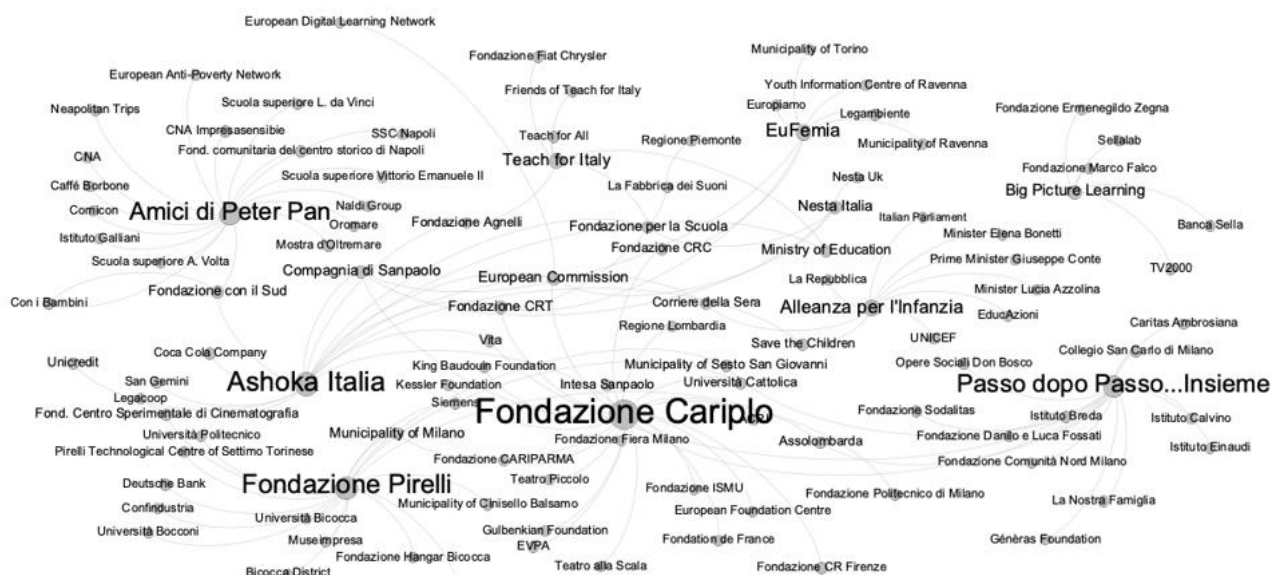
En outre, la plupart des organisations du réseau italien de plaidoyer en matière d'éducation sont des fondations, suivies par les organismes publics nationaux et les associations. Malgré cette répartition, les premiers rôles sont exercés par des acteurs «mineurs», qui sont directement liés aux pouvoirs publics italiens comme, par exemple, les municipalités, le parlement et les ministères italiens. En outre, d'autres "mineures" organisations sont liées à la Commission européenne par le biais de la participation à des consultations afin de fournir des avis sur des questions spécifiques.

Dans le réseau italien de plaidoyer en éducation (Figure 2), les fondations (27,52%) jouent le rôle de «hubs» en garantissant la connexion du réseau tandis que les pouvoirs publics italiens (11,93%) et les associations (11,01%) sont liés par des relations périphériques (voir par exemple l'association Amici di Peter Pan en haut à gauche connecté au réseau via l'entreprise sociale Con i Bambini). Dans le réseau, peu d'acteurs présentent une texture densément connectée et se définissent par des regroupements thématiques et géographiques. Il est également concevable que des organisations telles que l'organisation bénévole Passo dopo Passo...Insieme (en bas à droite) partagent non seulement une situation géographique, mais aussi une culture organisationnelle indépendante. Concrètement, Passo dopo Passo...Insieme trouve dans les valeurs catholiques sa diversité culturelle et la force de s'émanciper du centre du graphique.

Enfin, la Fondazione Cariplo, bien qu'elle soit l'un des principaux nœuds du graphique, ne semble pas jouer un rôle clé dans le système italien de plaidoyer en éducation: la relation entre les acteurs locaux et internationaux est généralement médiatisée par d'autres fondations bancaires et un rôle de premier

plan est exercé par la Fondation Compagnia di Sanpaolo (fondation bancaire) et la Fondation de la Caisse d'épargne de Cuneo.

**Figure 2. Réseau italien de plaidoyer de l'éducation**



### **Le plaidoyer comme «audience» avec le gouvernement**

La figure 2 permet de représenter le scénario d'un réseau de plaidoyer italien, où la latence partielle des initiatives nationales orientées vers une éducation de meilleure qualité a permis l'émergence de divers projets périphériques à adresser aux ministères et au parlement italiens.

Par conséquent, le réseau de plaidoyer en éducation présenté dans ce paragraphe est hétérogène. Il rassemble des acteurs issus de différentes sphères sociales, des établissements culturels aux entreprises économiques, des experts aux chercheurs. Aussi, les liens entre ces acteurs ne sont pas moins mitigés, allant du conseil au financement, de la collaboration aux intérêts du marché. De plus, cette combinaison de capitaux moraux, économiques et sociaux peut garantir une «écoute» au sein du gouvernement pour une idée politique». Tout cela donne également une texture sociale particulière à ces réseaux de plaidoyer en éducation, qui sont constitués d'un tissu complexe de relations sociales, politiques et commerciales qui associent le capital financier à la philanthropie, aux groupes de réflexion et aux acteurs politiques, nationaux et internationaux (Ball et Junemann, 2012).

En conclusion, les pratiques de plaidoyer introduites dans le paragraphe suivant positionnent les nouveaux philanthropes comme des «entrepreneurs politiques», les conférant le statut de «spécialistes» et permettant la création de relations de soutien entre les organisations de la nouvelle philanthropie et les décideurs politiques. De telles pratiques, dans le contexte plus large des changements néolibéraux vers la gouvernance des réseaux, permettent à la nouvelle philanthropie de



fonctionner non pas comme un influenceur politique, mais dans le cadre du processus d'élaboration des politiques lui-même (Avelar, 2018).

### **Stratégies de plaidoyer en faveur de l'éducation pour l'inclusion sociale**

Dans ce paragraphe, l'accent est mis sur les pratiques de plaidoyer que les organisations de la nouvelle philanthropie adoptent pour parvenir à l'inclusion sociale dans l'éducation. La première pratique examinée est liée à la redéfinition de l'éducation de l'enfance. La seconde concerne l'engagement des organisations de la nouvelle philanthropie dans l'amélioration de la qualité du système éducatif. En outre, les activités de plaidoyer liées à la promotion du changement éducatif dans l'éducation sont présentées. Enfin, la quatrième pratique de promotion de l'éducation introduite est l'autonomisation des étudiants dans les compétences numériques, entendues comme la croissance du potentiel personnel associé à des compétences particulières, telles que celles liées à la numérisation.

#### **Plaidoyer pour redéfinir l'éducation de la petite enfance**

Dans la poursuite de l'inclusion sociale dans le domaine éducatif, la protection de l'enfance est une activité fondamentale. Dans le cadre de la stratégie de plaidoyer éducatif pour redéfinir l'éducation de la petite enfance, certaines des principales actions menées par les organisations de la nouvelle philanthropie sont le renforcement des services aux familles parentales.

Comme il ressort des entretiens menées au cours du développement de cette thèse, le plaidoyer en faveur de l'éducation de la petite enfance en Italie est fortement nécessaire pour garantir l'accès quels que soient les revenus et le niveau d'éducation des parents. Parallèlement, la sensibilisation des parents à éduquer leurs enfants à prendre soin des autres et la redéfinition de l'idée d'expériences de croissance sont poursuivies par les organisations de la nouvelle philanthropie à travers des formations. Enfin, la réduction des coûts d'accès à l'école maternelles et l'élargissement de leur offre sont des mesures importantes qui pourraient permettre aux enfants de bénéficier de l'éducation publique. Les activités de plaidoyer dans le domaine de l'éducation de la petite enfance sont résumées dans le tableau 6.

**Tableau 6. Stratégies de plaidoyer pour redéfinir l'éducation des enfants**

<b>Stratégies de plaidoyer en faveur de l'éducation pour l'enfance</b>	<b>Types d'activités</b>
<b>Améliorer les services pour l'enfance</b>	Renforcer les crèches et les jardins d'enfants à temps plein et réduire les coûts d'inscription
<b>Mettre en réseau les écoles</b>	Rencontrer les directeurs pour synthétiser le travail effectué avec les étudiants au cours de l'année académique
<b>Proposer des formations aux parents</b>	Sensibiliser à travers des formations et des consultations et aider les parents à comprendre la nécessité d'éduquer leurs enfants au changement
<b>Réduire les coûts de l'éducation</b>	Promouvoir la gratuité des crèches et éliminer les barrières territoriales et de revenus à l'accès liées aux caractéristiques de la famille

### **Plaidoyer pour améliorer la qualité du système éducatif**

La poursuite de l'inclusion sociale en éducation est soutenue par d'organisations de la nouvelle philanthropie à travers des initiatives mises en place afin de favoriser une augmentation du niveau de qualité de l'offre de formation. De plus, ces formations sont dispensées aux étudiants pour renforcer leurs connaissances sur des sujets spécifiques.

L'objectif de garantir une meilleure qualité du système éducatif italien est poursuivi par les organisations de la nouvelle philanthropie à travers de nombreuses initiatives visant à la fois les élèves menacés de pauvreté éducative et d'exclusion sociale et leurs parents. Ces initiatives visent à offrir des outils pratiques pour assurer la croissance humaine et professionnelle des étudiants, tels que des cours de formation, des stages et le soutien d'«advisors», qui suivent en permanence les étudiants dans leur processus de croissance et d'apprentissage. Le tableau ci-dessous présente l'ensemble des activités de plaidoyer visant à promouvoir l'amélioration de la qualité du système éducatif, qui ont émergé au cours des entretiens.

**Tableau 7. Stratégies de plaidoyer pour améliorer la qualité du système éducatif**

Stratégies de plaidoyer pour améliorer la qualité du système éducatif	Types d'activités
<b>Assurer des formations pour les étudiants</b>	Répondre aux besoins de compétences grâce à des outils de travail théoriques et pratiques et favoriser l'apprentissage de l'autonomie, de l'organisation et du travail en équipe
<b>Lutter contre le décrochage scolaire</b>	Former les étudiants en risque d'exclusion sociale et les faire travailler grâce à la formule de stage
<b>Identifier les écoles défavorisées ayant besoin de soutien</b>	Cartographier les écoles sur la base du niveau socio-économique du quartier et des critères de résultats scolaires (pourcentage d'abandon scolaire, d'échec et d'inscription à l'université, etc.)
<b>Favoriser l'inclusion des élèves ayant des besoins éducatifs particuliers</b>	Accompagner les étudiants par l'intermédiaire de conseillers, qui s'occupent à la fois du plan d'apprentissage des étudiants et de leur croissance humaine en prenant soin de la méthode d'étude
<b>Augmenter la qualité de l'enseignement</b>	Convaincre ceux qui étudient dans les meilleurs contextes universitaires et qui ont un haut leadership personnel et professionnel d'enseigner et de rester dans «l'écosystème éducatif italien»

### **Plaidoyer pour poursuivre le changement éducatif**

Les actions de plaidoyer en éducation mises en œuvre par les organisations de la nouvelle philanthropie se concentrent non seulement sur l'amélioration de l'expérience personnelle de chaque élève, mais également sur un développement plus large du système scolaire italien grâce à un impact général sur le système scolaire. En effet, les organisations de la nouvelle philanthropie visent à faire évoluer l'éducation en dotant les étudiants des compétences dites «soft skills», ou «compétences du XXIe siècle», mais aussi de l'aptitude à être des «changemakers», c'est-à-dire être proactifs à apporter du changement. Ces organisations poursuivent également le changement dans le système éducatif, en stimulant la capacité des élèves rigoureux à avoir un impact sur les autres, en encourageant la capacité des jeunes «changemakers» à identifier les obstacles au changement dans le système éducatif et à les contrer, et enfin en formant des éducateurs professionnels à devenir agents de changement ou «entrepreneurs de l'éducation». Le tableau 8 résume l'ensemble des activités menées pour parvenir à un changement éducatif.

**Tableau 8. Stratégies de plaidoyer pour un changement éducatif**

Stratégies de plaidoyer pour changer le système éducatif	Types d'activités
<b>Rendre les élèves responsables de leurs actes et de leur impact sur les autres</b>	Améliorer les relations entre le personnel enseignant et non enseignant et les étudiants; accroître la pertinence de ce qui est étudié dans la vie quotidienne; favoriser la rigueur dans les études, le sens des responsabilités et le respect de ses actes
<b>Impacter sur les écoles</b>	Redonner au système éducatif italien le rôle d'ascenseur social qu'il avait dans les années 1950-1960
<b>Redonner au système éducatif italien le rôle d'ascenseur social qu'il avait dans les années 1950-1960</b>	Faire des jeunes diplômés des éducateurs professionnels grâce à des cours de formation et leur fournir les compétences nécessaires pour devenir des agents de changement
<b>Rendre les gens acteurs du changement</b>	Rendre les gens proactifs face au changement en incluant les entrepreneurs sociaux dans les réseaux éducatifs et en leur fournissant les compétences nécessaires pour changer le système éducatif

### **Plaidoyer pour autonomiser les étudiants dans les compétences numériques**

Les pratiques de plaidoyer pour parvenir à l'inclusion sociale dans l'éducation italienne incluent le développement des compétences personnelles, telles que celles liées à la numérisation. L'importance de l'autonomisation dans le champ de la numérisation, comprise comme la promotion des aptitudes et des compétences personnelles, faisant des bénéficiaires des actions de plaidoyer des protagonistes et non seulement des adjudicataires d'initiatives sociales, a été soulignée par les sujets interrogés au cours de l'enquête empirique. En outre, les pratiques de plaidoyer pour l'autonomisation des jeunes gagnent en importance en raison de la diffusion des technologies et des médias sociaux et de la nécessité de se former à l'utilisation de divers outils numériques. Par ailleurs, s'occuper des étudiants défavorisés est fondamental pour les responsabiliser et les impliquer concrètement dans des projets durables en termes de compétences numériques, pour en faire des protagonistes d'initiatives sociales et non de simples bénéficiaires.

**Tableau 9. Stratégies de plaidoyer renforçant les compétences numériques**

Stratégies de plaidoyer pour l'autonomisation des compétences numériques	Types d'activités
<b>Sensibiliser au potentiel des technologies numériques</b>	Mener des campagnes de sensibilisation à l'utilisation des médias sociaux et aux dangers de laisser des informations sur soi sur Internet
<b>Promouvoir les compétences</b>	Impliquer les personnes dans la formation des compétences non seulement en tant que bénéficiaires du système de protection sociale, mais également en tant que sujets actifs
<b>Promouvoir les formations sur les technologies numériques</b>	Former les étudiants à l'utilisation des technologies numériques (ordinateurs, téléphones portables et outils numériques) comme partenaires d'initiatives parfois issues du monde numérique
<b>Inclure les étudiants défavorisés dans les activités professionnelles</b>	Valoriser et embaucher des jeunes en soutenant des projets centrés sur la jeunesse; agir en petits groupes

## **Étude de cas 2: Passo dopo Passo...Insieme**

L'étude de cas pour présenter les stratégies de plaidoyer menées par les organisations de la nouvelle philanthropie pour parvenir à l'inclusion sociale dans l'éducation était unique et représentée par l'organisation bénévole Passo dopo Passo...Insieme. Cette organisation se concentre sur la fourniture de cours de formation pour les étudiants, les parents et les entreprises et un service parascolaire pour les collégiens afin de parvenir à une éducation inclusive. Aussi, Passo dopo Passo...Insieme vise les principes religieux pour mener à bien ses activités de plaidoyer éducatif.

L'organisation a été fondée en 2003 en tant qu'espace éducatif protégé pour le bien-être des enfants de 11 à 14 ans. L'idée est née suite à une observation approfondie menée par les fondateurs de l'association du réseau dense de relations impliquant les activités parascolaires menées dans l'oratoire de la paroisse Santo Stefano à Sesto San Giovanni, dans la province de Milan.

De plus, au cours des rencontres avec les familles, diverses discussions ont émergé sur les méthodes pédagogiques pour surmonter les difficultés scolaires des élèves. Par conséquent, les fondateurs de l'association ont eu pour objectif de remodeler le service parascolaire italien traditionnel, en le dotant d'une nouvelle méthode consistant en un lieu ouvert à tous les enfants selon une vision promotionnelle, coordonnée par des bénévoles formés, où faire les devoirs quotidiens pourrait devenir une opportunité d'apprendre à être organisé, autonome et à travailler avec les autres.

En outre, les buts de l'association sont: promouvoir et soutenir les initiatives destinées à prévenir le mal-être des jeunes générations; établir une relation de confiance et de collaboration nécessaire à la réalisation d'un travail éducatif profitable; parrainer des activités de coordination avec les agences éducatives de la zone de référence afin de créer un réseau de collaboration pouvant accueillir des interventions intégrées d'éducation et de formation; promouvoir des activités inclusives pour les personnes marginalisées.

De plus, 87% des ressources économiques de *Passo dopo Passo...Insieme* sont utilisées dans des activités éducatives. L'organisation tire également des fonds de: frais d'adhésion; contributions de l'État, d'organismes publics ou d'institutions qui visent exclusivement à soutenir des activités ou des projets spécifiques et documentés; contributions d'entités privées; contributions d'organisations internationales; contributions de sujets privés; événements et autres initiatives occasionnelles de collecte de fonds.

### **Le projet pédagogique principal: «Meglio dopo, Insieme»**

Le projet parascolaire «Meglio dopo, Insieme» entend promouvoir la motivation à étudier pour faire face à des difficultés ou des problèmes dans les études, en développant un réseau entre les associations et les organismes éducatifs. Le service s'adresse aux collégiens et voit l'implication des familles, des enseignants bénévoles choisis parmi les étudiants des écoles concernées dans le projet et des paroisses.

Encore, pour favoriser un environnement éducatif propice à la socialisation, des moments ludiques sont prévus avant le début des activités d'études. De plus, l'après-midi d'activités commence par un moment d'accueil et de jeu, au cours duquel les élèves peuvent s'organiser en toute autonomie. Puis étudiants et enseignants bénévoles se réunissent pour la prière initiale avant de se diviser pour mener à bien les activités avec un ratio d'un enseignant sur trois étudiants.

Enfin, le «Meglio dopo, Insieme» est suivi en cours, à travers des réunions hebdomadaires et mensuelles de l'équipe de supervision. Il est également évalué au travers de réunions périodiques avec les enseignants bénévoles et les directeurs des écoles.

## **Chapitre 11. Remarques finales: orientations futures de la recherche en éducation**

Cette recherche visait à répondre à la question de savoir comment les organisations de la nouvelle philanthropie favorisent l'investissement social dans l'éducation européenne en mobilisant leurs ressources. Pour conclure la thèse, dans ce dernier chapitre, j'examine les contributions de mes recherches à la pratique de la recherche en éducation.

Les conclusions les plus importantes de cette étude concernent la démocratisation de l'éducation par l'investissement social. En effet, les organisations de la nouvelle philanthropie, qui semblaient montrer le plus grand potentiel pour façonner positivement l'avenir de la gouvernance de l'éducation, ont offert aux étudiants la possibilité de s'impliquer dans l'éducation de nouvelles manières, notamment en améliorant l'accès aux services éducatifs, en soutenant l'action des jeunes et en favorisant leur plus grande implication dans la prise de décision.

Au fur et à mesure que je travaillais sur cette thèse, il est également devenu de plus en plus clair que la question de recherche faisait référence aux enjeux fondamentaux de la participation à la société et de l'accès aux services. En fait, au cours des 30 à 40 dernières années, le «welfare state» a été de plus en plus remis en question par le retrait des services publics et la privatisation de services clés. Dans le même temps, de nombreux services autrefois gérés par l'État ont été privatisés et, dans de nombreux cas, repris par des sociétés multinationales. La privatisation s'est souvent accompagnée d'efforts intenses pour commercialiser les services, avec des initiatives visant à encourager les utilisateurs des services à être considérés comme des consommateurs.

Ainsi, dans les pays à revenus élevés, une infrastructure en réseau distribue désormais des services dits «fondamentaux» parce qu'ils sont des nécessités quotidiennes, consommées par l'ensemble de la population et nécessaires au bien-être des privilégiés et des défavorisés, Ces services également comprennent l'éducation. Toutefois, ces services clés devraient être recentrés pour produire des résultats positifs pour les citoyens plutôt que pour les actionnaires et les profits, et pour offrir des alternatives à la prestation dirigée par l'État, en particulier lorsque l'État a retiré son soutien ou lorsque l'austérité actuelle a limité la capacité d'agir.

Par conséquent, l'idée de posséder une infrastructure éducative pour démocratiser l'éducation s'inscrit dans un sens plus large de démocratie qui émerge à travers l'autonomisation des personnes. Cette infrastructure aurait souvent besoin d'une certaine forme de soutien financier extérieur pour fonctionner avec succès là où des marchés viables n'existent pas, ou pour façonner efficacement les marchés existants. Un tel soutien devrait être une priorité pour les organismes de financement, car les entreprises communautaires peuvent compléter les secteurs publics en fournissant des services responsables et sont donc des acteurs importants de l'économie contemporaine. Ils jouent également un rôle important en se concentrant sur les groupes vulnérables et marginalisés, et le bien social qu'ils apportent doit être reconnu.

À la lumière de ces dernières réflexions sur le rôle et l'importance de l'éducation en tant que service essentiel dans nos communautés, je proposerai quelques recherches futures à explorer. Tout d'abord, reconnaissant les controverses éthiques générées par l'augmentation des investissements en capital-risque dans la gouvernance éducative, je considère les questions de l'expérience du processus de choix entre les étudiants des classes privilégiées et défavorisées, facilité par l'intervention d'acteurs privés dans l'éducation à travers des moyens financiers, dotation technologique, offre de formation, etc., une thématique importante pour le développement des recherches futures dans le domaine éducatif. Par ailleurs, la possible reproduction des inégalités en matière d'éducation provoquée par l'intervention d'organisations de la nouvelle philanthropie pourrait être développée dans des recherches futures. En

outre, il serait intéressant, à la lumière des récentes tendances en matière d'investissement à impact, d'examiner quels types d'initiatives d'investissement social ont tendance à avoir plus d'impact sur l'éducation que d'autres et de mesurer leur impact sur les étudiants.

En conclusion, cette étude représente un engagement pour des recherches futures sur la dynamique de l'investissement social dans la gouvernance européenne de l'éducation et il serait utile d'explorer les services et autres formes de fourniture nécessaires pour que le plus grand nombre de personnes possible puissent profiter d'un système éducatif de qualité et d'une vie agréable.



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