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Conceptualising Ideologically Bounded Equity in Japan: A Document Analysis of Curriculum Governance, High-Stakes Transitions and Shadow Education

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ABSTRACT

This study examines how responsibility for educational fairness is represented across curriculum governance, reform cycles, selective transitions, supplementary education and values and moral education in Japan. It uses thematic document analysis of a criterion-based purposive corpus of 43 documents: six Japanese official documents, five OECD publications and 32 academic or scholarly sources. The analysis identifies a substantive public guarantee of common curricular provision, meaningful but uneven recalibration across the Yutori and Post-Yutori periods, socially differentiated conditions for converting provision into valued pathways and heterogeneous functions of shadow education. Values and moral education have substantive pedagogical and normative purposes, but the corpus does not show that they directly legitimise examination-based inequality. Ideologically Bounded Equity is retained as a qualified, revisable middle-range interpretation: public commitment, institutional guarantee and differentiation are strongly supported; the boundary of public responsibility is partial and contested; and ideological legitimation remains tentative.

1 | Introduction

Educational reforms attempt to balance universal access with systems that stratify access to prestigious pathways and credentials. Curriculum standards, transition protocols, supplementary instruction and values-based curricula have different implications for equity. These domains fulfil interconnected institutional roles. Standardised curriculum is fundamental to a public right (Apple 2004; Okada 1999), and formal assessments are means for selection and differentials of access to prestigious pathways (Doyon 2001; Jones 2011). Supplementary education affects readiness for competitive transitions, but its modalities, availability and impacts vary across learners and contexts (Entrich 2018; Matsuoka 2017; Stevenson and Baker 1992). Values and moral education are related to broader normative aims for the betterment of individuals, societies and communities (Bamkin 2020; Biesta 2009; Nishino 2017). Equity depends on the distribution of the responsibility for provision, participation, preparation, selection and outcomes between public institutions, educational establishments, households, markets and individuals. Japan provides a unique empirical setting to study these questions. The Courses of Study are national curriculum standards that specify subject requirements and educational goals set by the Ministry of Education, Culture, Sports, Science and Technology (MEXT), such as ikiru chikara and moral education (MEXT 2011, 2018, 2020; Cave 2024; Nishino 2017; OECD 2018; Tsuneyoshi 2020). Concurrently, students are facing competitive transitions, organisational structures and a massive juku industry (Entrich 2018; Stevenson and Baker 1992; Yamamoto and Brinton 2010). The research explores whether these key elements, namely common provision,

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competitive allocation, privately mediated preparation and overarching educational goals, are institutionally coherent, institutionally distinct or inherently contradictory.

This is an issue that has been brought to the fore by Japan's recent history of reform. Since the latter part of the twentieth century, educational policy has continually recalibrated the relationship between subject matter, overarching skills and holistic growth (Cave 2001, 2024; Tsuneyoshi 2020). The Yutori reforms lowered mandated curriculum and increased integrated and inquiry-based learning (Bjork and Tsuneyoshi 2005; Cave 2001). Further amendments extended the length of instruction and reinforced the importance of the basic skills of literacy and mathematics but retained ikiru chikara as an overarching commitment to broader competencies. This evolution was marked by a transition from a competency-added framework in 1998 and 1999 to a competency-integrated framework in 2017 and 2018 (Cave 2024). PISA findings influenced the surrounding discourse, although their interpretation was mediated by political and institutional lenses (Cave 2024; Takayama 2008).

The extant literature remains conspicuously disjointed, despite considerable research across disciplines. Curriculum scholarship explores the changing relationships among standards, subject knowledge, competence, individuality, performativity and holistic development (see, e.g., Bjork and Tsuneyoshi 2005; Cave 2001, 2024; Tsuneyoshi 2004, 2020). Research on educational access and transitions reveals tensions between egalitarian and meritocratic principles and the determinants of educational trajectories. These conflicts are explored by Okada (1999), Stevenson and Baker (1992) and Yamamoto and Brinton (2010). Studies on shadow education, including research on juku (cram schools), examine its relationship with formal education and document differences in accessibility, structure, goals, intensity and outcomes across and within countries (Entrich 2018; Stevenson and Baker 1992; Yamamoto and Brinton 2010). Furthermore, moral education is primarily concerned with educational objectives, educator interpretation and accepted values (Bamkin 2020; Nishino 2017; Tsuneyoshi 2020). The key question is who should be held responsible for the different aspects of equity in the education system. Several theoretically relevant discussions speak to these tensions. Social justice, inclusive education and capability approaches differentiate, among other things, between 'access as formal entitlement' and 'access as substantive capability' (Ainscow 2020; Fraser 1995, 2005; Sen 1992, 2009). Theories of reproduction and closure help explain resource-based privilege and institutional boundaries (Bourdieu and Passeron 1977; Murphy 1988; Weber 1978). The critical curriculum literature examines the nature of official knowledge (Apple 1993, 2004; Bernstein 1971, 2000). For policy enactment the question is how the difference between authorised constructions of curriculum policy and situated practice operates (Ball et al. 2012). What theorists suggest about which aspects of equity are public, and which are the responsibility of others, is a key issue here.

The analysis draws on relevant Japanese policy and curriculum documents, OECD materials and a series of academic publications retrieved through purposive sampling and a criteria-based approach. Relevant Japanese policy documents present authorised policy intentions, representations of problems, policy tools and task assignments. OECD materials provide a system-level assessment, whereas academic studies offer historical, empirical and interpretive accounts of enacted policy, household choices, children's experiences and reform outcomes. The article advances Ideologically Bounded Equity to provide a preliminary middle-range theory for bridging together these fragmented sources that do not automatically point to an institutional coherency. The concept refers to a pattern of governance which secures dimensions of equality as public entitlements, whilst shifting or subordinating responsibility for dimensions beyond them to performances, markets, individual striving, household choices, private enterprises and other external domains of responsibility. 'Ideological' describes legitimation of this distribution of responsibility; boundaries of the concept's definition may be fluid, domain-specific, temporally varied and politically contested. Examining evidence that supports, complements and falsifies the concept within Japanese social arrangements reveals two connected contributions: empirical integration of evidence about curriculum, reform, unequal transitions, private tutoring, moral instruction and other issues into this framework; and conceptual differentiation of public responsibility for various forms of social justice.

The analysis is guided by the following research questions:

1. How do the analysed documents represent and justify national curriculum standards in relation to educational quality, equality of opportunity and publicly guaranteed educational entitlement in Japan?
2. What continuities and disjunctures are represented across the *Yutori* and *Post-Yutori* reform cycles, particularly between curricular change and assessment and transition arrangements?
3. How do the analysed documents describe the relationships among high-stakes educational transitions, shadow education, household resources and differentiated educational opportunities?
4. How are the purposes of values and moral education represented across policy and scholarly documents, and under what conditions can these representations be interpreted as pedagogical formation or normative governance?

2 | Analytical Framework: Educational Equity, Governance and the Institutional Boundary of Public Responsibility

2.1 | Educational Equity as a Multi-Level Policy Construct

Few principles command greater normative legitimacy in contemporary education policy than educational equity. Yet its broad political appeal has not generated a single or uncontested account of what equity entails. It may concern access to schooling, resource distribution, participation in learning, recognition of diverse identities and experiences, substantive

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opportunities to benefit from education, the allocation of credentials and pathways or representation in setting educational priorities (e.g., Ainscow 2020; Fraser 1995, 2005; Sen 1992, 2009). Gewirtz (2006) therefore cautions against applying social-justice criteria without regard to the institutional and historical contexts in which justice is understood and enacted. Studies of inclusion also show that formal placement per se will not necessarily guarantee social justice unless access is accompanied by removal of constraints on involvement in learning and progress in learning (Ainscow 2020). Studies of multicultural primary classrooms similarly show that access to a common curriculum can coexist with inequalities related to race/ethnicity, language, social class and disability, illustrating how classroom conditions mediate recognition and participation (Güven et al. 2023). Fraser's framework treats redistribution, recognition and representation as linked but analytically separable dimensions of justice (Fraser 1995, 2005). Applied to education, it directs attention to who gains access to schools, teachers, curricula and opportunities to learn, whose claims receive institutional recognition and whose voices carry weight in setting educational priorities.

Sen's capability approach similarly distinguishes formally available resources and entitlements from individuals' substantive freedom to achieve outcomes they have reason to value. Formally equal provision does not necessarily create substantively equal educational opportunity because personal, social, economic and institutional conditions shape learners' capacity to convert provision into participation, learning, achievement and progression. Educational applications of the capability approach therefore connect access to resources with agency: what matters is not merely whether resources are available, but whether learners can meaningfully use them. On this basis, the paper identifies five overlapping levels of educational equity: provision and entitlement; recognition and participation; capability and conversion; allocation and outcomes; and representation. Progress at one level does not establish equity across the others. An agreed curriculum or nationally guaranteed minimum may constitute an important public achievement, yet fairness at one institutional level provides only a partial account of equity across the system.

2.2 | Curriculum Governance, Official Knowledge and Pedagogic Discourse

Curriculum governance gives institutional form to public accountability by defining learning expectations, educational entitlements and the scope of state responsibility. A common educational floor may also constrain arbitrary variation and support egalitarian aims. Yet critical curriculum scholarship emphasises that school knowledge is neither neutral nor freely chosen by learners. Through a socially and politically shaped process of selection, curricula confer official legitimacy on forms of knowledge, values, qualities and conceptions of success. National standards therefore require scrutiny of their assumptions, selection principles and marginalised alternatives. Bernstein extends this concern with selection to pedagogic communication. Classification refers to the boundaries between categories of knowledge and social roles, whereas framing concerns control over selection, sequencing, pacing, communication and evaluation (Bernstein 1971, 2000). Curriculum governance thus regulates both what counts as legitimate knowledge and how legitimate learning is organised and demonstrated. Although a national curriculum may promote public entitlement and comparability, it does not ensure equal capability, performance or allocation. The relationship between curricular standardisation and selective allocation must therefore be examined empirically rather than presumed a priori.

2.3 | Educational Allocation, Social Reproduction and Social Closure

A common curriculum does not itself guarantee access to valued institutions, qualifications and their downstream consequences. Educational institutions also act as allocative agents that select, rank, position and distribute learners across differentiated pathways. This raises questions about the criteria governing selection, the resources learners need to meet them and whether formally common provision creates substantively comparable opportunities. Bourdieu's forms of capital and Bourdieu and Passeron's theory of reproduction explain how formally equal access can coexist with enduring social divisions (Bourdieu 1986; Bourdieu and Passeron 1977). Economic, cultural and social resources may facilitate preparation, information seeking, understanding of institutional expectations and the conversion of educational provision into rewarded performance. Murphy (1988) and Weber (1978) similarly show how social closure restricts access to valued opportunities through credentials, procedures, status hierarchies and institutionalisation. In Collins's (1979) account, credentials function both as evidence of attainment and as institutional conditions of competition. Meritocratic structures may therefore sustain a formal commitment to equality of opportunity alongside unequal capacities to compete. Supplementary education may reinforce privilege, compensate for disadvantage or serve other non-formal educational purposes. Its equity implications must therefore be examined in relation to availability, form, intensity, timing, purpose, links with formal institutions and reported outcomes.

2.4 | Policy Text, Enactment and Institutional Coordination

Educational policy does not pass unchanged from official formulation into institutional practice. Ball's distinction between policy as text and policy as discourse foregrounds the contested and mediated nature of policy meaning (Ball 1993). Official texts reveal authorised problem definitions, objectives, instruments and distributions of responsibility, but cannot by themselves establish how policies are interpreted or experienced. Policy-enactment scholarship therefore replaces linear implementation models with an account of interpretation and translation shaped by material conditions, institutional histories, professional cultures and resource constraints (Ball et al. 2012; Braun et al. 2011). Divergence between policy text and practice is thus constitutive of policy processes rather than merely an implementation failure.

Policy alignment is retained here only as a relational analytical strategy. It examines connections across policy domains

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through recurring problem definitions, incentives, evaluative criteria, thresholds and assignments of responsibility. Such alignment may be partial, contested, historically contingent or internally contradictory. Although this governance perspective overlaps with neoliberal-governance scholarship, it is not reducible to it (Ball 2012). Ideologically Bounded Equity therefore does not assume that every form of competition, private provision or household responsibility is neoliberal in either origin or effect.

2.5 | Educational Purposes, Moral Education and Curricular Justice

Education systems embody judgements about educational purposes and the forms of personal, social and public development that schools should cultivate. Interpreting values and moral education solely as social regulation reduces pedagogic purposes to political effects, whereas treating them only as character development may obscure the institutional authority through which virtues and conceptions of membership gain curricular legitimacy. Biesta (2009) conceptualises educational purpose through qualification, socialisation and subjectification. Values and moral education lie especially at the intersection of socialisation and subjectification. The central question is whether learners are positioned merely as recipients of authorised values or are also enabled to interpret, question, deliberate and exercise judgement.

Connell's concept of curricular justice asks whose standpoint informs the selection of educational knowledge and purposes, whose interests that selection serves and how curriculum relates to historically produced inequalities (Connell 1992, 1993). Moral education may foster empathy, ethical reflection, responsibility, participation and agency while simultaneously authorising understandings of proper conduct and social membership. It is not treated here as a structural allocation mechanism equivalent to examinations or supplementary education. Its relationship to Ideologically Bounded Equity is therefore secondary and conditional.

2.6 | Defining Ideologically Bounded Equity: Concept, Scope Conditions and Limits

Ideologically Bounded Equity is not intended to replace established perspectives or integrate them into a comprehensive theory of educational inequality. It addresses a more specific question: how do education systems define, distribute and justify the limits of their continuing responsibility for educational fairness? This refers to a configuration of governance that institutionalises certain dimensions of fairness as public entitlements while limiting or transferring responsibility for inequalities beyond these entitlements to performance, competition, individual effort, household strategies, private choice and other nonstate actors. Equity is examined across five overlapping dimensions: provision and entitlement, recognition and participation, capability and conversion, allocation and outcomes and representation. In this context, the term 'bounded' describes the institutional delimitation of public responsibility within domains and procedures.

The term 'ideological' refers to the legitimation of this allocation of responsibility, understood as a historically and politically constructed rationale. The concept requires five interrelated conditions: a public commitment to equity, an institutional guarantee, differentiation beyond that guarantee, a boundary or displacement of responsibility and legitimation of that boundary. The presence of inequality alone remains insufficient to establish this configuration. Targeted redistribution, differentiated support, transition reform and regulation of private provision may weaken or qualify the interpretation. The concept focuses on the institutional allocation and legitimation of public responsibility, while household decisions, individual outcomes, school level enactment and policy coordination require separate empirical analysis. Following Merton (1968), the concept is treated as a conditional, middle-range and revisable proposition. Table 1 positions Ideologically Bounded Equity in relation to the established perspectives that inform the analytical framework.

TABLE 1 | Positioning Ideologically Bounded Equity in relation to established perspectives.

Perspective	Primary analytical focus	Relationship to Ideologically Bounded Equity
Fraser	Redistribution, recognition, representation	Establishes dimensions of justice
Sen	Capability and substantive opportunity	Distinguishes entitlement from capacity to benefit
Apple and Bernstein	Official knowledge and pedagogic discourse	Explain the selection, organisation and legitimation of knowledge
Bourdieu, closure, credentialism and meritocracy	Resource conversion and opportunity boundaries	Explain differentiation and its justification
Ball and policy enactment	Representation, translation and context	Prevent policy text from being equated with practice
Biesta and Connell	Educational purpose and curricular justice	Prevent the reduction of moral education to governance effects
Ideologically Bounded Equity	Institutional delimitation and legitimation of public responsibility	Examines the relationship among entitlement, differentiation, responsibility and legitimation; builds on rather than replaces the preceding perspectives

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3 | Methodology

3.1 | Research Design and Analytical Orientation

Using qualitative thematic document analysis and criterion-based purposive corpus construction, this study investigated representations of educational fairness, reform agendas and institutional responsibility during Japan's Yutori and Post-Yutori periods. Because the research questions focused on official policy representations, system-level evaluations, historical interpretations and trends in the academic literature rather than personal experience or policy compliance, document analysis was an appropriate method (Bowen 2009). Iterative reading of the documents involved moving between extracts, classifications and interpretations. As claims were calibrated to each source's evidentiary capacity, the relational analysis revealed recurrent patterns, tensions and disjunctures. Neither the initial coding nor the selection of the corpus was influenced by Ideologically Bounded Equity. During substantive coding, educational equity became the primary analytical focus.

3.2 | Corpus Construction and Documentary Streams

Between April 2025 and February 2026, candidate documents were identified through publisher platforms, institutional repositories, Web of Science, Scopus, ERIC, MEXT, NIER and OECD repositories in addition to reference chaining. Searches incorporated terms related to education reform, curriculum governance, entrance examinations and educational transitions, juku (shadow education), moral education, equity and inequity and Japan or Japanese education. Title/abstract screening and full-text eligibility assessment were the first steps in the screening process. The study is described as criterion-based purposive document analysis rather than a systematic, comprehensive or fully reproducible database review because contemporaneous search histories, precise platform-specific Boolean strings, retrieval and duplicate-removal counts and screening totals were not retained and could not be reliably reconstructed. The detailed source-identification, screening, eligibility and analytical-unit procedures are reported in Appendix A.

The study topics' substantive domains were mirrored in the eligibility requirements. The theoretical and methodological literature was excluded from the corpus, whereas the documentary streams were given the specific evidentiary functions listed in Table 2. The 43-document evidential corpus does not include sources that were only used for theoretical or comparative contextualization, including non-Japanese research. The initial full-text and title/abstract-equivalent screening was carried out by the first researcher. Without independently repeating source identification, a second researcher examined both screening phases and reached an agreement to address eligibility and classification discrepancies. Six official documents from Japan, five publications from the OECD and thirty-two academic or scholarly sources made up the final purposive corpus once document versions, evidentiary roles and analytical units were verified. All were examined, extracted and coded but, rather than being treated equally, they were given different evidentiary functions, such

TABLE 2 | Composition and evidentiary roles of the documentary corpus.

Document stream	Time span	*N*	Inclusion focus	Evidentiary role
Japanese official policy and curriculum documents	1998–2023	6	National curriculum standards and official documents addressing curriculum, assessment, moral education, reform purposes or equity-related responsibility	Authorised purposes, policy instruments, entitlements and assignments of public responsibility
OECD reports and working papers	2011–2019	5	Country reports and thematic evaluations addressing system governance, equity, assessment, supplementary education or related reforms	External system-level evaluation and policy interpretation
Academic and scholarly sources	1975–2025	32	Journal articles, books and independently analysed chapters addressing Japanese reform, transitions, shadow education, moral education or inequality	Historical, empirical, interpretive, qualifying and disconfirming evidence
Total	—	43	Complete source list and source-specific decisions are reported in Appendix B	Sources were not treated as evidentially equivalent

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as direct, historical, contextual, qualifying or disconfirming. Appendix B reports source-specific bibliographic, version and analytical-unit decisions. The official Japanese documents were examined in English by both researchers. The research team analysed academic and scholarly literature in the languages that were available to them; the language and version of each source that was examined are listed in Appendix B.

Additional corpus sources that were reviewed and coded but are not discussed individually in the findings are identified here according to their evidentiary roles. Historical, policy, and system context was provided by Anderson (1975), Fujita (2000), Goodman (2007), Kitamura et al. (2019), Ministry of Education (1998), Omomo (2019), and Yaman and Özşen (2022). Sources concerning meritocracy, social inequality, equality of opportunity, educational transitions, and supplementary education included Dierkes (2013), Honda (2019), Kariya (2013), Kikkawa (2006), Okada (2012), Rohlen (1980), Smith and Colpitts (2025), and Yamato and Zhang (2017). Additional sources concerning early childhood education, teacher development, learning conditions, and academic resilience were included with source-specific direct, contextual, or qualifying roles (De Moll and Inaba 2023; Matsui 2021; Ministry of Education, Culture, Sports, Science and Technology 2022; Ministry of Education, Culture, Sports, Science and Technology and National Institute for Educational Policy Research 2023; OECD, 2015, 2019; Sandoval-Hernández and Białowolski 2016; Uchida 2021).

3.3 | Eligibility Criteria

Documents were included when Japan was the primary or a substantively examined case, the source addressed at least one research question or policy domain directly or contextually, the full text was available, the bibliographic identity and analysed version could be verified and the material provided sufficient official, historical, empirical, evaluative or sustained interpretive content for extraction and coding. Contextual sources were also retained when they contributed reform chronology, institutional background or triangulation relevant to the research questions. Documents were excluded when Japan appeared only incidentally, the source lacked substantively analysable material, duplicated existing analytical content without adding an independent contribution, had an unverifiable full text, bibliographic identity or analysed version or consisted of theoretical or methodological literature outside the evidentiary corpus on the Japanese case. Source specific eligibility and analytical unit decisions are reported in Appendix B.

3.4 | Data Extraction, Coding and Theme Development

Relevant material was managed manually in Microsoft Word rather than specialist qualitative software. Preliminary records consisted of topic-based files and broader compilations containing bibliographic notes, page-specific extracts and summaries, highlighted references, provisional thematic headings and evolving analytic memos. These heterogeneous working files supported familiarisation, comparison and early category development but did not constitute a single software-generated coding database.

During revision, the source documents and Word-based records were consolidated into a cleaned corpus register, structured extraction matrix, codebook and theme–evidence matrix. Each document received a unique identifier. The extraction matrix recorded source characteristics, evidentiary functions, relevant extracts, codes, categories, analytic memos and corroborating, qualifying or disconfirming material. The initial Word files were retained as analytic memos and audit trail records, while the original documents remained the evidentiary corpus. Revised claims were checked against these documents. Initial organising categories reflected the four substantive domains and assignments of responsibility related to equity. They guided early coding without determining the final themes. Ideologically Bounded Equity, moral governance, governance architecture and political stabilisation were not used as initial deductive codes and were considered only during later interpretation.

The theme development process followed the six phases described by Braun and Clarke (2006): familiarisation, initial coding, candidate theme development, theme review, theme definition and analytical reporting. Deductive and inductive components were integrated in the coding process, with additional codes added for recurrent ideas, conflicts, inconsistencies and document-specific issues not covered by the original classifications. Frequency was not the only factor used to determine analytical significance; other factors included source type, evidentiary function, historical location, relevance to the research topics, repetition and contradicting evidence. Both researchers independently coded around a purposively selected subset comprising approximately one-fifth of the corpus. To improve code definitions, extract boundaries, category scope and candidate themes, coding records were compared. The revised framework was then applied across the corpus, with ambiguous cases jointly reviewed. This procedure is reported as independent coding followed by calibration and consensus-based refinement, not as statistical intercoder reliability; no formal reliability coefficient is claimed. The final codebook, evidence-status tags, later-stage assessment codes, coding-calibration protocol and principal calibration decisions are reported in Appendix C.

3.5 | Later-Stage Assessment of Ideologically Bounded Equity

Ideologically Bounded Equity was evaluated as an interpretive statement rather than a deductive coding frame after iterative coding and candidate theme development. Each of the five requirements listed in the subsection ‘Defining ideologically bounded equity: concept, scope conditions, and limits’, a public equality commitment, an institutional guarantee, distinction beyond that guarantee, a boundary or shift of responsibility and legitimation of that boundary, was assessed separately. No single condition was sufficient to support the interpretation. Supporting, qualifying and disconfirming evidence were considered in the analysis. Differentiated public support, economic equalisation, control of supplemental education, reform of selective transitions, explicit identification of structural causes of unequal performance and critical or plural approaches to values education were among the potentially disconfirming materials. Rather than being treated automatically as further confirmation, evidence that

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complicated the thesis was evaluated to refine, qualify or reject the interpretation.

3.6 | Analytical Trustworthiness

Credibility, dependability, confirmability and transferability were used to address trustworthiness in accordance with Lincoln and Guba (1985). These elements were viewed as methodological objectives backed by open processes. The second researcher's review of eligibility decisions, source-appropriate use of the three documentary streams, page and section-specific extraction, comparison of conflicting interpretations, independent coding of roughly one-fifth of the calibration subset and attention to supporting, qualifying and disconfirming evidence all contributed to the strengthening of credibility. To improve code definitions, category boundaries, candidate themes and the supporting evidence for higher-level interpretations, analytical differences were examined.

Retaining the original topic-based Word files and keeping a cleaned audit trail of eligibility choices, document versions, extraction processes, codebook updates, theme development and source classifications helped to ensure dependability. Differentiating between documentary evidence and interpretation, connecting assertions to identifiable source extracts, documenting alternate explanations and keeping material that qualified or limited the selected narrative all strengthened confirmability. The Japanese institutional background, corpus boundaries, reform eras and documentary streams were all thoroughly described to address transferability. No statistical, universal or automatic generalisation across educational systems is claimed by the study. Following candidate-theme development, the emerging interpretations and their evidentiary bases were discussed with an external qualitative research expert through critical peer debriefing (Lincoln and Guba 1985). Peer debriefing addressed category boundaries, alternative explanations, claim and evidence alignment and conceptual circularity, informing more cautious themes and higher-level claims. This process is not presented as independent validation or external verification of the findings.

4 | Findings

The findings are organised into four themes aligned with the research questions. Evidentiary roles remained distinct throughout the analysis. Official documents provided evidence of authorised purposes, policy instruments, public entitlements and assignments of responsibility. OECD publications offered external system level evaluations, while academic and scholarly sources contributed historical, empirical and interpretive evidence within the scope of their designs. The corresponding matrix linking themes and evidence, including qualifying and disconfirming evidence and the limits of inference for each theme, is provided in Appendix D.

4.1 | National Curriculum Standards as Public Entitlement

Across official and system-level evaluative documents, the clearest and most consistent public-equity commitment concerns a nationally shared educational entitlement. MEXT presents the Courses of Study as national standards for elementary and secondary curricula and links them to the legal principle of equal educational opportunity (MEXT 2011, 2). The 2018 official brochure states that these standards are established 'to maintain definite levels of education and ensure equal opportunities for quality education for all' (MEXT 2018, 2). OECD analysis similarly describes the National Curriculum Standards as a legal framework specifying duties, objectives, content, time allocation, course structures and institutional responsibilities across school levels (OECD 2018, 80–82).

MEXT's 2008–2009 revision materials combine knowledge and skills with thinking capacity, decisiveness and expressiveness (MEXT 2011, 4–5). The provisional English translation of the 2017 elementary standards identifies knowledge and skills, thinking, judgement and expression and motivation to learn and humanity as interrelated curricular pillars connected to curriculum management (MEXT 2020, 1–3). The 2018 brochure likewise links national standards to holistic development (MEXT 2018, 2). Cave (2024, 278, 290–292) notes continuity in these broader capability aims alongside a shift from competency-added to competency-integrated curriculum design. Historical evidence also shows that equality of opportunity has carried multiple and contested meanings. Okada (1999, 171, 175–176, 186–187) identifies a persistent tension between egalitarian and meritocratic interpretations, showing how the same language of equal opportunity can support contrasting positions on selection, compensation and differentiated pathways. Common curricular entitlement may therefore carry different implications for subsequent allocation. Taken together, the documents establish an identifiable public commitment and institutional guarantee at the level of nationally prescribed curricular entitlement.

4.2 | Curricular Recalibration and Partial Institutional Alignment

The relationship between the Yutori and Post-Yutori periods is better understood as curricular recalibration than as a simple shift between progressive and traditional models. Yutori reduced prescribed content, introduced a five-day school week and expanded integrated and experiential learning (Bjork and Tsuneyoshi 2005, 620–621; Cave 2001, 178–180). Later revisions increased instructional time and subject content but retained *ikiru chikara* and embedded broader capabilities more explicitly within subject curricula rather than restoring the pre-Yutori model (MEXT 2011, 4–5, 2020, 1–3; Cave 2024, 284, 290–292).

International assessment results became influential in policy debate, although their meaning was institutionally and politically mediated. The 2003 PISA results were used to criticise Yutori, while PISA's competency orientation also supported the defence and refinement of broader capability aims (Cave 2024, 283–284, 292; Takayama 2008). The corpus therefore does not support a linear account in which PISA mechanically produced a straightforward reversal. Alignment between curricular ambition and consequential assessment nevertheless remained incomplete. OECD warned that, if

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high-stakes tests gave insufficient weight to the reform's three pillars, students might experience a curriculum 'much more limited than the reform intends' (OECD 2018, 95). This provides direct system-level evidence of a potential disjuncture between broad curricular purposes and the incentives generated by high-stakes assessment. The resulting pattern is one of partial and temporally uneven institutional alignment. The corpus supports meaningful curricular change and continuing commitment to broader capabilities, while also revealing unresolved tensions with consequential assessment.

4.3 | High-Stakes Transitions, Unequal Conversion Conditions and Shadow Education

The third theme concerns how common curricular entitlement is converted into differentiated educational pathways. OECD analysis identifies high-school and university entrance examinations as gateways to social status in Japan (OECD 2012, 193), while a later review reports that 61% of Grade 9 students attended examination-related *juku* (OECD 2018, 82). Jones (2011, 15–18) presents supplementary preparation as a resource valued by many learners and families but also documents financial burden, health concerns, reduced leisure, excessive competition and unequal household capacity. As the report notes, 'Juku impose a significant economic burden on parents' (Jones 2011, 16).

Matsuoka (2017, 347–348, 355–357) identifies socioeconomic and neighbourhood differences in educational expectations and study time shortly before high-school selection. Post-secondary expectations partly account for the relationship between socioeconomic circumstances and learning time at both individual and neighbourhood levels. These findings indicate that effort is socially situated, but they neither justify moral distinctions between diligent and non-diligent learners nor establish a simple causal sequence; Matsuoka explicitly notes that the direction of causality between expectations and study time remains uncertain.

According to Yamamoto and Brinton (2010, 75–79), school placement, academic achievement, cultural capital, household resources and shadow schooling all function differently during different periods of transition. After controlling for high school quality, shadow education was no longer statistically significant for final achievement and only slightly correlated with ninth-grade performance. It was more significantly associated with admission into higher-quality high schools. Therefore, its effects seem to function partially indirectly through institutional placement. Entrich (2018, 155, 179–181) offers crucial qualification, demonstrating that returns differ according to duration, form, aim, transition point and socioeconomic status. While some transition-focused juku and correspondence courses also helped underprivileged students, long-term, entrance-oriented juku participation was especially linked to entry to prestigious universities. However, disparities in involvement, cost and accessibility remained substantial. Accordingly, shadow education can serve different purposes across groups and transitions, reinforce advantages or make up for disadvantages. Overall, the evidence shows that much of transition-oriented preparation is funded by households and strongly supports differentiation beyond the common curricular guarantee. However, the extent of public responsibility remains contested and only partially realised. The public continues to be concerned about unequal preparation, as seen by criticism of exam pressure, plans to improve school services, initiatives to lessen reliance on juku and demands for greater access to after-school assistance (Jones 2011, 33, 36; OECD 2012, 202). Therefore, the findings suggest that there is some household mediation within an ongoing, if unequal, area of public accountability.

4.4 | Values and Moral Education: Pedagogical Purposes and Normative Tensions

Values and moral education are viewed as areas of ethical contemplation, interpersonal accountability, collaboration and involvement in shared life throughout the corpus. The goal of moral education, according to MEXT (2020, 1), is to help students think critically, exercise judgement and coexist peacefully with others. Additionally, MEXT (2018, 4) connects moral education to confronting competing rights, obligations and values. According to Nishino (2017, 46, 50–55), the 2015 reform was designed to promote introspection, dialogue, group learning and problem-solving. The evaluation model does not take moral education into account when making decisions about entry exams, instead emphasising descriptive assessment and intrapersonal growth (Nishino 2017, 53–54). Bamkin (2020, 218, 221, 223, 225–228, 233–236) demonstrates how formal moral instruction is recontextualized through lunch, cleaning, classroom duties and reflective activities throughout school life. As a result, classroom practices may deviate from curriculum recommendations (Bamkin 2020, 218), underscoring the mediated relationship between enactment and policy. A dual and bounded interpretation is supported by the facts. In addition to authorising certain ideas of behaviour and social membership, values and moral education can promote introspection, empathy, accountability and collaboration. Recurring evidence that examination and allocation pressures are primarily framed through human effort, self-regulation or moral failure while their institutional sources receive less attention would be necessary for a more robust understanding of moralization.

5 | Discussion: A Qualified Relational Assessment of Ideologically Bounded Equity

5.1 | Assessing Ideologically Bounded Equity Against the Evidence

The discussion returns to Ideologically Bounded Equity as a later stage proposition assessed against the findings. Concept-driven policy analysis carries a risk of circularity when concepts guide the reading of evidence and are subsequently confirmed through the patterns identified. Accordingly, the conditions specified in the subsection 'Defining ideologically bounded equity: concept, scope conditions, and limits' are examined separately, with the interpretation calibrated to supporting, qualifying and disconfirming material. The documentary evidence points to substantial public guarantees alongside institutional disjunctures, policy contradictions, uneven change and variation across domains. Ideologically Bounded Equity is therefore interpreted as relational, historically contingent and institutionally uneven.

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TABLE 3 | Evidentiary assessment of the conditions of Ideologically Bounded Equity.

Condition	Principal evidence	Assessment
Public equity commitment	Official commitments to equal opportunity, educational quality and common provision	Strongly supported
Institutional guarantee	National curriculum standards and common compulsory-school conditions	Strongly supported
Differentiation beyond the guarantee	Selective transitions and socially differentiated expectations, preparation and institutional placement	Strongly supported, but heterogeneous
Boundary or displacement of responsibility	Household-mediated preparation alongside continuing public criticism and intervention	Partially supported and contested
Legitimation of the boundary	Fragmented merit- and responsibility-oriented representations, qualified by structural criticism and pedagogical counterevidence	Tentative; a consistent cross-domain legitimation pattern is not established

Support across the conditions varies. Official and system level documents provide strong evidence for a public equity commitment and an institutional guarantee by linking national standards to equal opportunity, common educational conditions and broader curricular purposes (MEXT 2011, 2, 4–5, 2018, 2, 2020, 1–3; OECD 2018, 80–82). Differentiation beyond this guarantee also receives strong support, although its mechanisms and effects vary across transition stages, forms of preparation and social positions (Matsuoka 2017, 347–357; Yamamoto and Brinton 2010, 75–79; Entrich 2018, 155, 179–181). Evidence for a boundary or displacement of public responsibility is more qualified. Households finance and organise a substantial share of transition-oriented preparation, while criticism of examination pressure, proposals to strengthen school provision and public or community support initiatives indicate a continuing public role (Jones 2011, 15–18, 33, 36; OECD 2012, 202). Ideological legitimation receives weaker and more fragmented support. Meritocratic interpretations of equal opportunity and responsibility oriented curricular language appear across the corpus, alongside criticism of household burden and examination pressure and commitments to reflection, independent judgement, conflicting values and noncomparative evaluation (Okada 1999, 175–187; MEXT 2018, 4, 2020, 1–2; Jones 2011, 15–18; Nishino 2017, 50–55; Bamkin 2020, 225–236). The bounded dimension consequently receives stronger support than the ideological dimension. Table 3 summarises this differentiated assessment of the five conditions of Ideologically Bounded Equity, while Appendix D provides the fuller condition-level assessment and inference-boundary summary.

5.2 | Public Entitlement and the Multidimensional Character of Equity

A common curriculum is a significant public accomplishment. Official documents also associate national standards with equity, common minimum conditions and a balance among foundational knowledge, broader competencies and whole-person development (MEXT 2011, 2, 4–5, 2018, 2, 2020, 1–3; OECD 2018, 80–82). To limit arbitrary variation, the standards specify common national expectations and thereby establish a common educational floor and a public reference point against which provision can be assessed.

According to Apple (1993, 2004) and Bernstein (1971, 2000), this entitlement also entails the selection and organisation of knowledge. These perspectives do not, in themselves, imply that national standards cannot serve egalitarian purposes. Rather, they reveal the political and pedagogical processes through which common entitlement is contested, defined, organised and communicated. According to Fraser (1995, 2005) and Sen (1992, 2009), common provision alone cannot provide a sufficient account of educational equity. Problems relating to recognition, participation, representation, capability, conversion, allocation and outcomes cannot be reduced to provision at a single institutional level. According to Matsuoka (2017, 347), Japan's increasing movement towards centrally funded and nationally standardised teacher qualifications, class sizes, facilities, curricula and textbooks suggests that public responsibility extends well beyond common curricular provision. Overall, the most frequently mentioned public guarantee in the official documents examined is common curricular provision, while public responsibility beyond that guarantee remains uneven across different dimensions and institutional fields.

5.3 | Curricular Recalibration and Partial Institutional Alignment

The evidence does not support the interpretation that curricular reform was merely symbolic. The *Yutori* period involved material changes in instructional time, prescribed content, the school week and Integrated Studies, while the Post-*Yutori* revisions substantially rewrote and, in some cases, restructured subject curricula (Bjork and Tsuneyoshi 2005, 620–621; Cave 2001, 178–180, 2024, 278, 290–292). The later reforms therefore reconfigured rather than abandoned broader capability aims. The analytical issue is not whether curricular change occurred, but whether curriculum, consequential assessment and selective transition arrangements changed together.

The evidence indicates that these domains were related only partially. OECD's warning that high-stakes tests may narrow

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the curriculum experienced by learners when they give insufficient weight to the reform's three pillars provides direct system level evidence of this disjuncture (OECD 2018, 95). This pattern aligns with policy enactment scholarship, which emphasises that policy domains are interpreted and translated through distinct institutional histories, professional cultures, material conditions and resource environments (Ball 1993; Ball et al. 2012; Braun et al. 2011). In the Japanese corpus, the most proportionate interpretation is therefore one of partial, contested and temporally uneven institutional alignment, with varying degrees of coordination, enactment and policy effectiveness. Partial institutional alignment becomes relevant to Ideologically Bounded Equity when public responsibility is specified more clearly for common curricular entitlement than for the conditions through which that entitlement is converted into success at consequential transitions.

5.4 | Selective Transitions and the Partial Externalisation of Preparation

The most pronounced differentiation occurs at selective educational transitions. Although exam-based allocation makes criteria visible and formally common, transparency of criteria does not by itself establish that learners have substantively comparable opportunities to demonstrate merit (Mijs 2016). The unequal conditions under which common curricular provision is converted into recognised performance cannot be analytically separated from this conversion process. This analytical position draws on Sen's distinction between formal entitlement and conversion capability and Bourdieu's account of capital (Bourdieu 1986; Sen 1992, 2009). Student-level characteristics such as socio-economic resources, educational expectations, study conditions, supplementary provision, performance and institutional placement operate differently across learners and transition stages (Matsuoka 2017, 347–357; Yamamoto and Brinton 2010, 75–79; Entrich 2018, 155, 179–181). Available evidence indicates that a large share of transition-oriented preparation is financed and organised in households. This can be interpreted as a partial externalisation of the work involved in converting public curricular entitlement into competitive advantage. Yet this does not mean that public responsibility has been entirely withdrawn. National-level critiques of exam pressure, proposals to strengthen schools, attempts to reduce reliance on juku and suggestions to widen access to after-school support indicate that inequalities in preparation remain a matter of public concern (Jones 2011, 15–18, 33, 36; OECD 2012, 202).

The heterogeneity of shadow education is central to this interpretation. Entrich (2018, 155, 179–181) shows that the returns associated with supplementary provision vary by programme form, duration, purpose, transition point and socioeconomic position, with some transition-oriented forms also benefiting disadvantaged learners. Yamamoto and Brinton (2010, 75–77) similarly find stronger associations between shadow education and entry into higher quality high schools than with ninth grade performance or final educational attainment once institutional placement is considered. The inequality relevant pattern therefore concerns differentiated access to the form, timing, intensity and strategic use of supplementary provision at consequential transitions. Within the present interpretation, this pattern indicates a partial and contested boundary of responsibility.

5.5 | Values and Moral Education Between Pedagogical Purpose and Normative Governance

The explanatory breadth of Ideologically Bounded Equity is put to the test by values and moral education. According to official guidelines, independent judgement, coexistence, human dignity, public spirit and considering opposing ideals, rights and obligations are important (MEXT 2018, 4, 2020, 1–2). Beyond tensions between authorised textbooks and centrally driven reform, Nishino (2017, 46, 50–55) describes an intended shift towards reflective dialogue, problem-solving, non-comparative evaluation, teacher-developed contextual learning and greater professional discretion. Regarding the behavioural impacts of focused moral education classes, Bamkin (2020, 218, 223, 225–228, 233–236) emphasises teacher mediation, whole-school practices, reflection and uncertainty. Tsuneyoshi (2020) places these methods in the context of a broader holistic development curriculum. Biesta's (2009) distinction between qualification, socialisation and subjectification helps situate moral education at the intersection of learner agency and shared responsibility. In addition to subjectification through individual judgement, thought and responsible action, the documents show socialisation into common practices. Connell's concept of curricular justice highlights how educational life is organised for participation, how authorised purposes interact with historically generated disparities and whose beliefs and experiences gain curricular authority (Connell 1992, 1993). These viewpoints uphold the substantive pedagogical goals of moral education while establishing its normative legitimacy. The data suggest that the main purposes of moral education are educational and ethical development. Recurring cross-domain evidence demonstrating that pressures resulting from exams, selective transitions or unequal preparation are systematically reframed through individual effort, perseverance, self-regulation or responsibility while their institutional sources receive relatively little attention would be necessary for a stronger moralization interpretation. Therefore, there is strong evidence of thoughtful debate, interaction with opposing beliefs and autonomous judgement with responsibility-oriented rhetoric. This trend suggests that moralization should be viewed as a constrained and context-specific kind of governance.

5.6 | What Ideologically Bounded Equity Adds and Its Explanatory Limits

Ideologically Bounded Equity complements established perspectives on justice, capability, reproduction, social closure, meritocracy, curriculum, policy enactment and educational purpose, each of which addresses distinct mechanisms and normative questions. Fraser and Sen clarify the dimensions of justice and the distinction between formal entitlement and substantive opportunity (Fraser 1995, 2005; Sen 1992, 2009). Apple and Bernstein examine how publicly guaranteed curricular knowledge is selected, authorised, organised and communicated (Apple 1993, 2004; Bernstein 1971, 2000). Bourdieu, Murphy and Mijs explain how unequal resources, institutional boundaries and definitions of merit shape educational advantage (Bourdieu 1986; Bourdieu and Passeron 1977; Murphy 1988; Mijs 2016). Ball and other policy enactment scholars highlight the mediation of official policy through institutional practice (Ball 1993; Ball et al. 2012). Biesta and Connell further foreground educational purpose, learner

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agency and curricular justice as analytically significant dimensions of education. The concept contributes a cross-domain institutional question concerning which dimensions of educational fairness remain continuing public obligations, where responsibility becomes weaker, dispersed, transferred or contested, and how these arrangements are justified or challenged.

The concept focuses on the institutional allocation and legitimation of public responsibility rather than on household-level decisions, individual outcomes, school-specific enactment, intentional coordination across policy domains or the normative evaluation of every differentiated outcome. Its explanatory boundaries are further clarified by alternative interpretations, including genuine equalising aims, transparent and legitimate allocation of scarce opportunities, heterogeneous educational demand, compensatory uses of supplementary provision and substantive pedagogical purposes. In the Japanese case, Ideologically Bounded Equity captures an asymmetrical evidentiary pattern rather than offering a total account of the education system. The corpus strongly supports a public commitment to common curricular provision, an institutional guarantee and differentiation beyond that guarantee. Evidence for a boundary of public responsibility is more limited and contested, while support for the ideological legitimation of that boundary remains tentative. The concept is therefore retained as a conditional, disconfirmable and revisable middle-range proposition (Merton 1968), not as a definitive characterisation of Japanese education or a universally applicable theory.

5.7 | Comparative Scope: From Empirical Claim to Research Proposition

This study provides a context-specific examination of Japan. Separate empirical analysis is necessary for European and other centralised education systems. In contexts where evidence supports the five interconnected conditions defined in the subsection 'Defining ideologically bounded equity: concept, scope conditions, and limits' and demonstrates how responsibility is represented, institutionalised, displaced, justified and contested, national curriculum standards, tracking, high-stakes assessments and private tutoring become relevant to Ideologically Bounded Equity. The analytical mobility of the Japanese case is what makes it comparable. It offers scope conditions and research questions that may guide independent research across different contexts. Future comparative studies should create evidence bases that are specific to the setting, separate authorised policy representations from enactment and impacts, examine evidence that supports, qualifies and refutes the findings and allow for conceptual change or rejection. European and other education systems may constitute productive sites of inquiry, with classification grounded in independent empirical analysis.

6 | Conclusion and Implications

This research examines how responsibility for educational fairness is represented across curriculum governance, reform cycles, selective transitions, supplementary education and values and moral education in Japan. National curriculum standards establish a substantive public entitlement, while the Yutori and Post Yutori reform cycles introduced meaningful change. Learners encounter socially differentiated conditions when converting common provision into valued pathways and institutional placements. Shadow education is associated with selective transitions, although its forms, uses and reported effects vary across groups and stages. Values and moral education serve pedagogical and normative functions, with the evidence positioning their contribution primarily within reflection, judgement, responsibility and participation in common life. The Japanese case reveals a patterned yet porous asymmetry in public responsibility, with stronger evidence for institutional boundedness than ideological legitimation. Ideologically Bounded Equity directs attention to where equity remains a continuing public obligation, where responsibility weakens or changes form and how these boundaries are justified and contested. The concept functions as a conditional middle-range framework focused on institutional responsibility, evidentiary limits and patterns across policy domains. Causal effects, local enactment, household motives and policy coordination require complementary empirical inquiry.

The analysis offers a set of implications for policy evaluation within a nonprescriptive framework. Curriculum reform should be assessed alongside the examinations and transition arrangements that shape institutional and learner priorities, with evaluation clarifying which curricular aims receive recognition in consequential assessments and how these instruments influence broader educational purposes. Monitoring should also address common school conditions, access to pathway information, school-based support, household expenditure, preparation environments and entry into differently valued institutions. Comparable opportunity depends on learners' capacity to convert formal curricular entitlement into educational benefit. Policy evaluation should distinguish the major forms and purposes of supplementary education and assess their accessibility, cost, intensity, timing and effects, together with the availability of school-based or publicly supported alternatives. Values-oriented education should likewise be examined through its contribution to ethical deliberation, learner judgement, participation, responsibility and teacher interpretation. Comparative evidence from multicultural education research also highlights sustained professional learning as an institutional condition shaping how inclusive educational purposes are interpreted and enacted (Babayiğit et al. 2025). These pedagogical dimensions should accompany redistributive, curricular, assessment-related and support-oriented responses to structural inequalities. Accordingly, policymakers should specify the dimension of fairness guaranteed by each reform, the constraints affecting learners' conversion of provision into valued opportunity, the institutions responsible for addressing those constraints and the evidence used to interpret differences through choice, effort or performance.

7 | Limitations and Future Research

Evidence concerning enactment, household decisions, student experience, placement, outcomes and reform effects derives from the included studies and remains bounded by their designs. The purposive corpus varies in period, educational level,

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population, design and analytical scale, while official documents provide limited insight into local disagreement, institutional variation and informal practice. Appendix B records the English language policy versions and the language and version of all scholarly sources analysed. The findings therefore reflect the linguistic and conceptual content available in the reviewed English versions. Ideologically Bounded Equity emerged through engagement with the same national case in which it was assessed. The separation of corpus construction, substantive coding, candidate theme development and later stage conceptual assessment helped manage the continuing risk of theory and data circularity.

Future research should connect documentary representation with enactment and lived experience through interviews, observations and participatory inquiry across policy, school, household, student and supplementary education settings. Longitudinal and mixed methods studies could examine how resources, expectations, school support, supplementary provision and placement shape later outcomes. Classroom research should distinguish ethical deliberation, socialisation, subjectification, regulation, learner agency and the individualisation of structural problems. Further studies should assess the proposition through independently constructed, context specific evidence and allow its scope and explanatory claims to be refined, narrowed or rejected according to the presence of its defining conditions.

Author Contributions

Meral Güven: data curation, supervision, resources, methodology, validation, conceptualization, writing – original draft. **İlhan Yadigâr Kılavuz:** conceptualization, investigation, writing – original draft, methodology, validation, visualization, writing – review and editing, resources.

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Ethics Statement

This study relied solely on publicly available documentary sources and did not involve human participants or identifiable personal data.

Consent

The authors have nothing to report.

Conflicts of Interest

The authors declare no conflicts of interest.

Data Availability Statement

The documentary sources analysed in the study are identified in the reference list and corpus appendix and may be accessed through the relevant publishers, institutional repositories or libraries. Appendices A–D provide the source-identification and eligibility procedure, final corpus and eligibility-decision register, codebook and coding-calibration record and theme–evidence and concept-assessment matrix. Preliminary Word working files are retained as internal audit-trail materials and are not included in the public supplementary package because they contain provisional annotations, duplicate bibliographic entries and extended source extracts. No personal or confidential data were collected.

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Supporting Information

Additional supporting information can be found online in the Supporting Information section. **Appendix A:** Source identification, screening and eligibility procedure. **Appendix B:** Final corpus and eligibility-decision register. **Appendix C:** Final codebook and coding calibration record. **Appendix D:** Theme-evidence matrix and concept assessment.

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