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Education and governance: The Russell–Hayek Conundrum through the lenses of ancient Sparta and the "Sparta of the East"

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Education and governance:
The Russell–Hayek Conundrum through the lenses of ancient Sparta and the "Sparta of the East"[1]

George C. Bitros[2]

Abstract

This article examines the role of education, more in the form of character building, as a central instrument of governance through a comparative analysis of Sparta, the Qin Dynasty of China (221–206 BCE) — often described as the "Sparta of the East,"—and modern China. It frames the analysis through the Russell–Hayek conundrum: the tension between the need for social cohesion produced through education and the preservation of individuality necessary for scientific, technological, and cultural advancement. Drawing on the critiques of Bertrand Russell and Friedrich Hayek, the article argues that education systems reflect deeper governance architectures. Sparta represents maximal internalization of obedience through state-controlled education; Qin represents externalized control through law and structure; modern China synthesizes these approaches through layered institutional and ideological systems. The article concludes that no system fully resolves the trade-off between disciplined, cohesion, and intellectual freedom, and that this tension remains central to the comparative future of governance models.

Keywords: Education, governance, obedience, Sparta, Qin Dynasty, China, Russell, Hayek, individuality, state control
JEL codes: H11, I28, J24, N30, O43, P16

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1. Introduction

The conundrum in question regarding the role of education, more in the form meant by the Greek term *agoge* (αγωγή), in governance emerges from the shared but differently articulated concerns expressed by philosophers Bertrand Russell and Friedrich Hayek. In his *A History of Western Philosophy*, Russell (1945) presents ancient Sparta (henceforth just Sparta) as a paradigmatic case of a society that subordinated all aspects of life—including education—to the production of military discipline and obedience. His critique of the *agoge* system is not merely historical but philosophical. He argues that Sparta achieved order by suppressing individuality, intellectual inquiry, and moral independence.[3] For Russell, Sparta represents a warning: the pursuit of perfect obedience risks eliminating the very qualities that make progress possible. Hayek (1960), writing in *The Constitution of Liberty*, approaches the issue from the perspective of institutional design. While accepting a limited role for the state in ensuring access to education, he strongly opposes centralized control over curricula and educational systems. Hayek's argument rests on the importance of pluralism: intellectual progress depends on diversity of thought, competition between institutions, and decentralized experimentation.[4] The **Russell–Hayek** *conundrum* can therefore be summarized as follows:

> *How can education produce social cohesion without suppressing the individuality required for long-term intellectual and technological development?*

As such, it explains why education as a mechanism for skills formation and as a means for shaping the behavior, identity, and allegiance of citizens, occupies a foundational position in all political systems.

In Western style societies the conundrum has been confronted by molding into the character of youth social norms through moral and patriotic suasions, concerns and respect for the parents and the old, and care for the neighbor. Classic in this regard has been in the literature the following hypothetical dialogue from Durant, Durant (1967, 791):

(Between Pope Benedict XIV and Voltaire somewhere in the grateful memory of mankind)

Voltaire: I still think that philosophers can dispense with morality.

Pope Benedict XIV: How naïve you are. Are children capable of philosophy? Can

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[3] See Russell (1945), Chapter XII.

[4] In this instance Russell and Hayek take a utilitarian view of education. Both oppose to state controlled education because it may curtail intellectual progress. Unlike them, Machlup (1969) would oppose to state monopoly on education because it would destroy the freedom of choice. For him, personal freedom is valued for itself.

> *children reason? Society is based upon morality, morality is based upon character, character is formed in childhood and youth long before reason can be a guide. We must infuse morality into the individual when he is young and malleable; then it may be strong enough to withstand his individualistic impulses, even his individualistic reasoning. I am afraid you began to think too soon. The intellect is constitutional individualist, and when it is uncontrolled by morality it can tear society to pieces.*

The progress achieved by these nations suggests that the self-restraining influence of such institutions as the family, the church, and the autonomous education systems is working. Individuals pursue freely their happiness as long as their actions are not forbidden by law, and the states have found it unnecessary to suppress individuality. On the contrary, the relationship between education and governance is particularly visible in Eastern style societies where governments explicitly attempt to engineer obedience and social cohesion.

The structural tension identified by Russell and Hayek between education as a tool for social order and as a prerequisite for individuality and intellectual autonomy reflects a broader historical pattern that may foreshadow future developments. Societies and educational systems that promote individuality tend to produce higher levels of scientific innovation, technological advancement, and cultural production. Innovation requires deviation from established norms and the ability to question authority. Therefore, social environments that encourage independent thinking function as **engines of long-term progress**.[5] But the preservation of individuality comes with social costs, such as increased uncertainty, slower consensus formation, and lower tolerance for dissent.[6] These burdens make the benefits of individuality inseparable from instability. In contrast, social systems that discourage individuality tend to promote uniformity and predictability. Yet while they may produce stability, they risk long-term stagnation by limiting intellectual diversity and experimentation. Looking ahead, the implications are clear. In the long term, the outcome of the competition between governance models will increasingly depend on the relationship between

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[5] In his *The Gifts of Athena*, last year's Nobel Laureate Mokyr (2002) argues that the Industrial Revolution—and modern economic growth more broadly—were driven not simply by technology or capital, but by a transformation in useful knowledge: how societies *understood* nature, *organized* knowledge, and *applied* it to production. His core claim is that Europe's unique institutions accelerated a cultural shift valuing systematic inquiry, openness, verification, and dissemination, thus creating conditions for sustained innovation.

[6] Aside from these social costs, individuality channeled through education may be responsible to some extend for several other social ills. For example, consider the analysis by Weber (1922/1978). Extending Marx's focus on class, he adds status and party as distinct forms of social power. Education plays a crucial role in all three. It produces credentialed groups that monopolize access to desirable positions; it supports social closure, where only those with specific qualifications can enter elite occupations; and it helps structure the hierarchy of class, status, and party in modern capitalist societies.

individuality and innovation. The education system will become a strategic domain; and educational pluralism will be viewed not as inefficiency but a form of **structural resilience**.[7] At that juncture, no governance reform - regardless of how monumental - will be deemed unthinkable.

This article seeks to accomplish two goals. The first goal is to highlight the *Russell–Hayek conundrum* by tracing it back to its historical roots. This is pursued in Sections 2 and 3. In the former section we focus on the case of ancient Sparta, whereas in the latter section we turn to the case of the Qin Dynasty in China, which, for the reasons that we shall explain, has been called in the relevant literature "Sparta of the East." Given that both these cases have been well documented in easily accessible literature, we have kept the presentation compact to absolute essentials. Then, in Section 4, we take on the case of contemporary China, where the government in Peking exercises control over the education system throughout this vast country. It is a very interesting case because it affords us three advantages: First, to gouge its educational structure and assess its efficiency and sustainability. Second, to find out how China confronts, if at all, the Russell–Hayek conundrum; and lastly, to speculate on how a Deng Xiaoping type of reform in the long future might look like.[8] Section 5 closes the paper with a summary of the findings and the conclusions.

2. Sparta: Education as governance

The framework of *agoge* constituted the institutional foundation of Spartan civic identity and military culture, functioning as a comprehensive system of education, discipline, and socialization that shaped male Spartiates from childhood through early adulthood. Although later tradition attributed its creation to the semi-mythical lawgiver Lycurgus, the system as described by classical authors appears to have taken shape gradually, reaching its canonical form by the late Archaic and early Classical periods. Its purpose was not merely the cultivation of martial skill but the production of a distinctive civic ethos—one that subordinated individual interests to the collective needs of the polis and embedded each citizen within a tightly regulated hierarchy of age, status, and communal obligation.

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[7] This conceptualization is reminiscent of Popper's (1945) thinking. From theory and history it follows that social openness is science, innovation, and culture enhancing. Hence, to the extent that educational pluralism contributes to political instability, the case is no different than the resilience with which an airplane absorbs air shocks and air pockets without breaking or a house withstands the force of an earthquake.

[8] In democracies, education systems are considered from different perspectives. For example, Weber (1922/1978) extends Marx's focus on class by adding status and party as distinct forms of social power. Education plays a crucial role in all three. It produces credentialed groups that monopolize access to desirable positions; it supports social closure, where only those with specific qualifications can enter elite occupations; and it helps structure the hierarchy of class, status, and party in modern capitalist societies.

Entry into the *agoge* began at the age of seven, when boys were removed from their households and placed into communal cohorts (*agelai*) under the authority of a magistrate known as the *paidonomos*. This initial separation from the family was central to the system's logic: the state, rather than the house (oikos), assumed responsibility for the moral and physical formation of future citizens. Early training emphasized obedience, endurance, and conformity to group discipline. Literacy was taught only at a rudimentary level, reflecting the Spartan conviction that intellectual cultivation was subordinate to the development of character and physical excellence. Boys slept on beds of reeds, wore a single cloak year-round, and received limited rations, conditions designed to habituate them to hardship and to cultivate resourcefulness. Theft of food was tolerated—and even encouraged—so long as the youth was not caught, a paradoxical practice that reinforced stealth, cunning, and the ability to survive under deprivation.

As the boys advanced into adolescence, the *agoge* intensified. Physical training expanded to include wrestling, boxing, running, and weapons practice, while ritualized contests of endurance and pain tolerance became central features of the curriculum. Public beatings, sometimes conducted in religious contexts such as the sanctuary of Artemis Orthia, served both as tests of fortitude and as spectacles reinforcing communal values. At this stage, a select group of promising youths might be chosen for the *krypteia*, a secretive institution described by ancient authors as a form of internal security service directed against the helot population.[9] Although the precise nature of the *krypteia* remains debated, its association with stealth, violence, and surveillance underscores the extent to which the *agoge* prepared young men not only for warfare but for the maintenance of Sparta's coercive social order.[10]

Throughout the process, the *agoge* cultivated a communal identity that superseded familial and personal ties. Boys and young men dined in common messes (*syssitia*), lived under constant supervision, and were subject to a system of peer evaluation that reinforced conformity and ex-

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[9] Helots were state-owned serfs of Sparta—neither chattel slaves nor free citizens. They were bound to the land, obligated to farm the allotment of land (kleros) assigned to a Spartiate, and required to deliver a fixed portion of agricultural produce. They could not be sold abroad or freed by individual masters. They formed the demographic majority of Spartan-controlled Laconia and Messenia, whose agricultural labor sustained the Spartan military state. For some rudimentary details about the economy, the currency, and the international trade of Sparta, see Bitros (2026).

[10] In view of the great time distance, this assessment may be somewhat excessive. For, as Christos Baloglou has pointed out to me in private correspondence, Aristotle (1944) categorizes Sparta to *prospering* (ευδοκιμούσες) societies. However, I read the relevant passages differently. For Aristotle, Sparta was militarily effective, but politically and socially flawed. Its laws aimed at virtue but produced inequality, corruption, and instability. The helot system, the role of women, and the structure of offices all prevented Sparta from achieving the true best regime.

cellence. Music, dance, and choral performance—far from being peripheral—played an important role in shaping collective discipline and transmitting civic ideology. Mentorship relationships between older and younger youths, described by Xenophon and Plutarch, further integrated individuals into the hierarchical structure of the citizen body.

Upon reaching the age of twenty, participants entered the final stage of the *agoge*, transitioning into full military service while continuing to reside in communal barracks. Only at thirty did a man become a full citizen with the right to live with his family and participate fully in political life. The *agoge*, therefore, was not merely a childhood training program but a prolonged process of civic formation that extended across more than two decades.

Ancient assessments of the *agoge* vary. Xenophon (1925) praised its discipline and effectiveness, presenting it as a model of rational civic organization, while other authors, including Aristotle (1944) and Plutarch (1916), criticized its harshness, its narrow focus on military virtue, and its failure to cultivate broader forms of excellence. Modern scholarship, such as Kennell (1995), Cartledge (2001, 2002) and Hodkinson (2010), likewise debates the accuracy of classical descriptions, noting that many accounts reflect idealized or retrospective constructions of Spartan identity. Nevertheless, the *agoge* remains one of the most distinctive educational systems of the ancient world, a program that fused physical training, moral discipline, and ideological formation into a single, state-directed project of producing the Spartan warrior-citizen.

In sum, education in ancient Sparta was fully integrated into the structure of the state. The *agoge* system functioned as a comprehensive mechanism for producing disciplined citizens through early separation from family, communal upbringing, endurance training, and strict hierarchical supervision. The aim was the creation of individuals whose identity was inseparable from the state. This system was supported by the helot labor structure, allowing citizens to focus entirely on discipline and warfare. The result was cohesion and military effectiveness, but also intellectual limitation. As Russell notes, Sparta produced order without contributing significantly to philosophy, science, or the arts.

3. The Qin Dynasty: Structural Control in the ancient "Sparta of the East"

The Qin Dynasty (221–206 BCE) is often described as the "Sparta of the East" due to its similarly uncompromising pursuit of social order. However, it differs in method, relying on **external-**

ized control rather than educational internalization. Influenced by philosopher Han Feizi,[11] Qin governance operated through codified laws, standardized administration, centralized authority, and reward and punishment systems. Rather than trying to shape the character of citizens, Qin structured behavior through incentives and constraints. Large-scale projects extended state control spatially. These systems, regulated movement, mobilized labor, and integrated territory. Qin thus achieved scale but depended heavily on enforcement, contributing to its short duration. But its accomplishments—political unification, administrative centralization, cultural standardization, and monumental state-building—created the durable framework of imperial China. Subsequent dynasties, beginning with the Han, inherited and refined these structures, ensuring that the Qin legacy endured long after the dynasty itself collapsed.

The phrase "Sparta of the East" appears in modern analyses of the Warring States period, especially in discussions of Legalism—the ideology that shaped Qin's rise. According to these sources, Qin's transformation from a marginal, semi-tribal state into the dominant military power of China at that time resembles Sparta's rise from a small Dorian community into the most feared hoplite state in Greece. The comparison rests on several structural parallels shown in Table 1. Observe that none of the parallels on the right-hand column refers to any attempt on the part of the emperor to shape through education and training the behavior, identity, and allegiance of his subjects. The Legalist approach he had adopted was to institute external constraints in the form of laws and natural barriers in conjunction with a system of incentives and disincentives so as to channel their reactions in the desired direction.

The Qin dynasty represents one of the earliest and most radical attempts in world history to subordinate intellectual life to the imperatives of centralized state power. Its Legalist ideology conceived education not as a domain for moral cultivation or scholarly inquiry but as a potential threat to political stability. As a result, the Qin state did not build schools, sponsor learning, or encourage literacy beyond what was necessary for bureaucratic administration. Instead, it restricted access to knowledge, suppressed classical traditions, and punished independent scholars. Education, in the Qin view, was dangerous unless tightly controlled; it could produce alternative loyalties, critical thinking, or moral arguments that challenged the authority of the ruler. The in-

[11] Han Feizi (c. 280–233 BCE) was the most systematic and influential theorist of Chinese Legalism, synthesizing the ideas of earlier Legalist thinkers into a coherent philosophy of statecraft. He is a foundational figure for understanding the political logic behind the Qin unification and later authoritarian traditions in China.

Table 1:Structural parallels between ancient Sparta and Qin Dynasty of China

Ancient Sparta	Qin Dynasty
Militarization of society	Legalist thinkers such as Shang Yang reorganized Qin society around military service, strict discipline, and collective obedience. This mirrors Sparta's *agoge* and its total orientation toward producing soldiers. Qin's population was mobilized for constant warfare, and military merit became the basis for social advancement.
Harsh legal discipline and collective control	Legalism held that people are inherently selfish and must be controlled through strict laws, harsh punishments, and absolute obedience to the ruler. This resembles the Spartan system of communal discipline, suppression of individuality, and state-directed life. Qin's laws applied equally to nobles and commoners, with severe penalties for even minor infractions.
Austere, anti-luxury ethos	Like Sparta, Qin was long regarded as culturally "backward" or "half-barbarian," emphasizing simplicity, frugality, and martial virtue over refinement. This cultural austerity was seen as a source of military strength.
Centralization and suppression of dissent	Qin's rulers centralized power, abolished aristocratic privileges, standardized administration, and crushed intellectual opposition—famously through book burnings and persecution of scholars. This evokes Sparta's suppression of dissent and tight control over education and ideology.
Military supremacy leading to unification	Just as Sparta became hegemon of Greece after the Peloponnesian War, Qin—through its militarized system—defeated all rival states and unified China in 221 BCE under Qin Shi Huang. The Legalist "Spartan" model was credited with enabling this unprecedented consolidation of power.

famous book-burning edict of 213 BCE and the persecution of scholars symbolized this approach: the state sought to eliminate intellectual pluralism and enforce a single, utilitarian conception of knowledge aligned with Legalist governance.

4. Contemporary China: Education as layered and embedded governance

From Perry (2018) it follows that China's contemporary education system is best understood not simply as a hierarchical administration, but as a form of **layered and politically embedded governance**, in which authority is distributed across multiple levels while remaining tightly coordinated through party-state structures. At the top, strategic direction is defined not only by the Ministry of Education but by the broader political priorities of the Chinese Communist Party (CCP), which shape curriculum frameworks, ideological content, and long-term developmental

objectives.[12] Thus, according to Green (2013), education serves a dual function: the formation of human capital and the cultivation of political and social alignment.

Implementation is organized through a multi-tiered administrative system—provincial, municipal, and county levels—each responsible for translating national directives into operational policy. This produces what may be described as **centralized-decentralization**: subnational actors exercise discretion in implementation, but within clearly bounded performance metrics, inspection regimes, and political accountability mechanisms that align local behavior with central priorities.[13] The provincial layer plays a particularly important role because China's vast regional diversity makes uniform implementation impossible. Provinces adapt national policies to local economic conditions, demographic pressures, and administrative capacities. Municipal and county governments then handle the granular work—school construction, teacher deployment, quality monitoring, and everyday supervision. These layers act as intermediaries, ensuring that central priorities are implemented while also filtering upward information about local needs and constraints. The result is a governance system which is perceived as both hierarchical and adaptive.

At the institutional level, governance extends beyond administrative hierarchy into organizational embedding. Schools and universities operate within dense accountability systems structured around examinations, evaluation criteria, and ideological requirements.[14] In many cases, internal governance is further shaped by embedded political structures, including CCP organizations within educational institutions,[15] ensuring alignment with broader state objectives. Autonomy therefore exists, but as conditional and constrained agency within a structured environment of incentives and oversight.

Taken together, this configuration reflects a shift from direct command to systemic alignment. Behavior is not governed primarily through continuous state guidance and intervention, but through the design of institutional environments in which desired outcomes become the rational and expected course of action. Following Foucault's (1977), unidirectional influence of government mandates aimed at shaping the character and the behavior of students, the education system

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[12] In China's model of political economy the CCP through the Central Committee and the Politburo has full control of all government operations, including the education system. A glimpse of the vast range of ex-ante and ex-post controls that the Party exercises may be obtained from various documents of the Central Committee of the Chinese Communist Party (2016-2021).

[13] The literature on these organizational aspects of China's education system is huge. Readers interested in more details may consult, for example, Naughton (2018) and Ang (2016).

[14] See OECD (2020).

[15] See Chinese Communist Party, (2021).

allows neither institutional nor intellectuals revolts. It functions as a core mechanism of systemic discipline, organizing behavior, structuring expectations, and reproducing alignment across administrative and social levels. Whatever autonomy is granted to schools, universities, and other educational institutions, it is circumscribed by the authority of the CCP team based in house.

In the light of the above, it is now time to return to the three issues that we left in abeyance in the last paragraph of the introduction.

The issue of efficiency and sustainability

For the sake of the analysis, we assume that China's education system operates like a Multi-regional Corporation headquartered in Peking. If it were, the central management could assess instantly the balance sheet in every province, hold accountable regional managements which failed, and take corrective measures. This evaluation could be carried out because the standard of assessment would be costs and benefits measured in money terms. But in the present case performance would have to be assessed by multiple, mostly political, criteria which are hardly measurable. The question then arises: How do they allocate resources? In the United States where private education markets are robust, States might allocate public resources to education using market determined prices and thus preserve efficiency on behalf of taxpayers. But in China private education is relatively limited, it is hardly competitive, and indications are that it is shrinking. So, there is a *calculation problem*.[16] As a result, efficiency is impossible to gouge and the same is true for sustainability.

The issue of Russell-Hayek conundrum.

We saw above that in China education is used primarily as an instrument of social cohesion, whereas individuality is cultivated within limits defined by the state and in a special way. The education system is designed to produce a unified national identity, a shared moral vocabulary, and a high degree of social discipline. These goals are pursued through a standardized curriculum, strong emphasis on national history and civic education, and a pedagogical culture that values order, ef-

[16] Using the reasoning proposed by Mises (1920) and Hayek (1940), it can be shown that in China the education sector exhibits features of a *calculation problem* since at the various administrative levels the state must allocate resources with no access to the dispersed knowledge that markets normally provide. This existing educational structure may be even more wasteful than the Marxist-Leninist-Maoist central planning. For, if regional education authorities at any level are authorized to allocate resources, in the absence of competitive market prices the inputs, irrespective of monitoring and punishments for corruption, the cost of operations will be elevated.

fort, and responsibility. In this respect, China aligns with the "cohesion-first" side of the Russell–Hayek conundrum: the state treats education as a mechanism for shaping a coherent social body.

At the same time, China does not reject individuality outright. Instead, it channels it into forms that support national development. Students are encouraged to excel, innovate, and compete, but these forms of individuality are instrumental rather than expressive. They are meant to enhance academic performance, technological capacity, and economic modernization. But individuality that manifests as personal autonomy, dissent, or unconventional intellectual exploration is less supported, if not discouraged, because it is seen as potentially destabilizing (Remember Qin?). This creates a dual structure: high-performing, ambitious individuals are celebrated, but only insofar as their ambitions align with collective goals. The result is a system that produces strong social cohesion, trust, and high levels of academic achievement, but at the cost of narrowing the space for the kind of open-ended individuality that Hayek and Mokyr more recently associated with independent thinking as the *engine of long-term technological and cultural progress*.[17]

Therefore, although so far China has demonstrated that it is possible to combine technological progress and social cohesion, the risk of deceleration, due to the structuring of individuality in a way that remains subordinate to the overarching project of "Socialism with Chinese characteristics", is ever present and growing.

What a Deng Xiaoping reform might look like

Encyclopedia Britannica summarizes the political, economic and cultural impact of Deng Xiaoping on China as follows:

> *Deng emerged as China's paramount leader in the late 1970s and initiated sweeping reforms that abandoned many orthodox communist doctrines in favor of* ***market-oriented policies****, foreign investment, and decentralized economic management. These reforms produced* ***rapid economic growth****, rising living standards, and deeper integration with the world economy. Deng also expanded personal and cultural freedoms compared to the Mao era, while maintaining strict political control under the Communist Party. His leadership is widely credited with transforming China from an isolated, impoverished state into a major global economic power.*

Consequently, if China in the coming decades discovers that their current model of political economy

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[17] The social cost of this public choice in terms of sluggishness in the rate of technological innovation has started already to show up in the empirical studies that investigate the determinants of the technological gap between the United States and China. For an example, see Papanicos (2025).

does not give them an edge in their quest for leadership in the world, they w gap between ill need a Deng Xiaoping type of reform. This reform will aim at reversing the subordination of individuality to social cohesion. Without abandoning the one-party governance, and particularly that of the CCP, such a reform may be possible within a regime that follows Plato (1963) ideas for Kallipolis.[18]

5. Summary of findings and conclusion

The three cases illustrate distinct approaches. Sparta internalized obedience through total education. Qin externalized obedience through law and structure. Modern China employs a hybrid system combining both. This progression reflects a shift from direct control of individuals to layered governance systems. The *Russell–Hayek conundrum* remains unresolved. Sparta demonstrates the limits of total educational control; Qin demonstrates the limits of purely structural control; modern China represents an evolving hybrid. Education emerges as a **core component of governance architecture**, shaping not only behavior but the long-term trajectory of societies. The balance between cohesion and individuality remains the defining challenge. China demonstrates that a modern state can achieve high social cohesion through education, but doing so tends to limit the forms of individuality that Russell-Hayek-Mokyr have found as essential for autonomous intellectual evolution. The system produces disciplined, high-performing individuals, but not necessarily the kind of independent thinkers these intellectual leaders hoped education could cultivate.

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[18] Numerous contributions before and after the book by Bartsch (2023) was published have accumulated into a voluminous literature that focuses on the theme "Plato goes to China", whether in evidential or coincidental terms. The evidence suggests that China's contemporary model of political economy differs fundamentally from the model that Plato (1963) proposed for *Kallipolis* in that the state in China controls almost 70% of all assets, which presently amount to 200% of GDP.

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