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Quasi-Markets and Innovation in Education

Abstract

Policymakers around the globe have looked to quasi-market mechanisms such as choice and competition to promote greater levels of innovations in the way children are educated. Innovation is seen as an important route to improve the efficiency and effectiveness of schools, as well as to provide new and better opportunities for disadvantaged children and communities. This review of research synthesizes evidence on educational innovation in such school systems where policies promote at least one of three factors: (1) greater levels of consumer choice of schools, (2) greater levels of school-level autonomy, and/or (3) greater levels of competition between schools. We conclude that quasi-market mechanisms are succeeding in a number of areas, but a closer examination of patterns suggests significant distinctions in how innovations can be generated at different levels of educational organizations, and points to the importance of the institutional conditions in which incentives may be more effective.

Keywords: innovation, quasi-markets, competition, autonomy, school choice

„Quasi-Märkte“ und Innovationen im Bildungsbereich

Zusammenfassung

Politiker auf der ganzen Welt haben „Quasi-Markt“-Mechanismen wie freie Schulwahl und Wettbewerb eingeführt, um im Bildungsbereich mehr Innovationen zu erreichen. Innovationen werden als wichtig erachtet, um die Effizienz und Effektivität von Schulen zu steigern und benachteiligten Kindern und Regionen neue und bessere Chancen zu eröffnen. Dieser Beitrag gibt einen Überblick über Forschungsergebnisse zu Bildungsinnovationen in Schulsystemen, die mindestens einen der drei folgenden Faktoren erfüllen: (1) größere Entscheidungsfreiheit der „Verbraucher“ bei der Schulwahl, (2) mehr Autonomie auf der Ebene der Einzelschule und (3) mehr Wettbewerb zwischen Schulen. Es kann gezeigt werden, dass Quasi-Markt-Mechanismen in vielen Bereichen wirkungsvoll sind. Ein genauerer Blick auf die Wirkungsmuster zeigt jedoch bedeuten-

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de Unterschiede hinsichtlich der Entstehungsbedingungen von Innovationen auf den einzelnen Ebenen von Bildungsorganisationen; er macht die institutionellen Bedingungen deutlich, unter denen solche Anreize tatsächlich Wirkung zeigen können.

Schlüsselwörter: Innovation, Quasi-Märkte, Wettbewerb, Schulautonomie, freie Schuwahl

1. Quasi-Market Mechanisms in Education

Reformers around the globe have noted the need for innovations in the way children are currently educated. Particularly in view of the more competitive global economy and the technological demands of the increasingly integrated information society, school systems developed in response to industrial or even agricultural socioeconomic models appear to be insufficient for preparing all students with opportunities to succeed. And the recognition of the need for innovation is widespread. Concerned about the deadening uniformity imposed by monopolistic education bureaucracies, policymakers in many different countries endorse “quasi-market” mechanisms of consumer choice and competition between autonomous providers as the key factors that emulate the efficiency, effectiveness and entrepreneurial tendencies of the private sector (cp. Bartlett 1993; Walford 1996; Whitty 1997; Wolff et al. 2005). In understanding the role of quasi-markets in education, it is useful to note that there are in fact a number of compelling arguments for families to select between competing schools in deciding where to send their children. According to this line of thought, since centralized bureaucracies exercise control over local schools, there is little opportunity for teachers or school administrators to innovate. Similarly, since top-down administration relies on rules and regulations, rather than experimentation and rewards, in this logic there are few if any incentives for trying new innovative ideas outside of bureaucratically permitted approaches.

Inasmuch as this is the primary factor inhibiting innovation in education, the solution then centers on breaking up the state’s monopolistic control over publicly funded schools, or otherwise compelling the state schools to complete and adopt organizational orientations and behaviors not aligned with their monopoly status. While some systems have gravitated more toward private or privatized models of education, other policymakers have sought to use market-style mechanisms within the state sector and between state entities and non-state actors, as has been done for other public services (cp. Whitty/Power 2000b). Such policy schemes draw on market mechanisms such as consumer choice and competition for clients, yet typically maintain a substantial role for the state in areas such as funding, compelling consumption of school services, and curriculum, assessment, or regulation of employees and institutions. Therefore, despite efforts by some to move schooling into more of a purer, laissez-faire market

model, market mechanisms in education in many cases is best thought of as a “second-best” or “quasi-market” (cp. Lubienski 2006).

This analysis focuses on this issue of innovation in primary- and secondary-level school systems that use quasi-market mechanisms. The survey synthesizes evidence on educational innovation in such school systems where policies promote at least one of three factors: (1) greater levels of consumer choice of schools, (2) greater levels of school-level autonomy, and/or (3) greater levels of competition between schools. These systems utilize a number of models, including publicly funded and privately administered schools, schools run by corporations, newly autonomous established schools, and schools created to be free of bureaucratic constraints specifically in order to develop innovative practices.

This review of the evidence indicates that quasi-market mechanisms are succeeding in a number of areas. But a closer examination of patterns suggests significant distinctions in how innovations can be generated at different levels of educational organizations, and points to the importance of the institutional conditions in which incentives may be more effective. It highlights areas requiring further investigation in order to better understand the full potential of quasi-market mechanisms for spurring innovations to improve education.

1.1 The Global Movement towards Quasi-Markets for Education

In order to foster quasi-markets in education, a number of nations have adopted policies or reforms that adhere in varying degrees to the prescriptions for decentralized autonomy, deregulation, and competitive incentivization for education systems. These policies are expected to promote innovation in education: within classrooms, in governance and management, in content, in information and delivery systems. The examples of nations moving to, or using, various approaches to quasi-market in education in the last three decades are numerous; for the sake of brevity, we discuss only a few examples below that represent larger patterns.

In recent decades, policymakers in the United Kingdom implemented policies of decentralized autonomy (despite concurrent policies of centralization in assessment and curriculum) and choice within the publicly funded sector that effectively created what a leading proponent of these reforms calls a “virtual voucher” system (cp. Walford/Miller 1991, p. 6)². In Germany’s federal system, policymakers have promoted deregulation (cp. Oettle 1997) and school-level autonomy in various German Länder (cp. Reuter 2004; St. John-Brooks 1995; Tooley 2002). Japan also provides partial subsidies

² Sexton, quoted in: Whitty/Power (2000a; 2000b, p. 3). For more detailed descriptions of the emergence of education reform policies in the UK, see Gewirtz/Ball/Bowe (1995), Rogers (1992), Walford (1994), and Whitty/Edwards/Gewirtz (1993).

for private high schools, and both public and private schools charge fees; choice is being introduced in many areas in the state sector, but it is already firmly a feature of the private *juku* or cram schools (cp. Dierkes 2008; West 1997).

In many ways, Australia and New Zealand have led the policy movement by embarking on more concerted efforts to adopt comprehensive quasi-market systems. Since the early 1970s, Australia has incrementally expanded differentiated public subsidies for private schools, and has thus substantially expanded the private sector's share of the education market; more recently, quasi-market elements have become greater policy priorities to nurture innovative schools (cp. Angus 2003; Forsey 2008; Glenn 2003; Hirsch 1995; Hirsch/OECD 1994; Kober 2000a, 2000b). On the other hand, New Zealand quasi-markets were formed largely in the state sector as part of a wider market-oriented approach to social services, starting in the early 1980s by successive Labour and National governments (cp. Mikuta 1999).

Other nations have even longer experience with government subsidies for private or independent schools. The Netherlands have provided financing for both public and private school sectors for almost a century; currently, private schools, which are typically church-affiliated but funded on equal footing with public schools, enroll almost seven in ten students. Dutch schools – public or private – have control over pedagogical matters, and the right for individuals or groups to enter the school quasi-market is constitutionally guaranteed (cp. Amelvoort/Scheerens 1997; Dijkstra/Dronkers/Karsten 2004; Hirsch/OECD 1994; Mouw 2003; Vermeulen 2004; West 1997). Similarly, Belgium dealt with the challenges of pluralism (although with a more established tradition of decentralization) through a strong commitment to educational freedom in the form of subsidies to non-state schools; two of three Flemish students attend such schools (cp. De Groof 2004; Glenn 2003). Ireland, on the other hand, with a single dominant denomination that essentially ran state schooling, responded to calls for decentralization in the mid to late 1990s by establishing mechanisms for various *patrons* to authorize new schools, and implemented regional and site-based school authorities; the idea of parental choice of schools is widely accepted (cp. Fox/Buchanan 2008; Lennon/White 1997).

In the 1980s, Chile moved to a voucher system as part of the Pinochet government's broader move toward markets. Notably, these measures followed from perception that an overly centralized system constrains classroom innovation and, therefore, achievement (cp. Parry 1997b). Chilean education reformers – influenced by Public-Choice theorists (see Mueller 1989) – then focused on user-based public funding and decentralizing governance (cp. Carnoy/McEwan 2003; Gauri 1998; McEwan/Carnoy 2000; Parry 1997a). A decade later, Sweden embraced public-sector choice and vouchers for private schools in the early 1990s as part of a broader move away from the welfare

state,³ with both independent and public schools enjoying substantial control over budgets and curriculum decisions in many administrative municipalities, and school management companies expanding their presence (cp. Daun/Siminou 2005, p. 31; see also van Amelsvoort/Scheerens 1997; Daun 2003; Hirsch/OECD 1994; Rising 2008; St. John-Brooks 1995; West 1997).

Of course, these countries represent a substantial range in terms of the degree to which they leverage quasi-market mechanisms for the organization, production and distribution of educational services. Building on the work of earlier researchers at the World Bank and the Center on Education Policy (cp. Kober 2000a; West 1997), we can make some generalizations on overall patterns of state support and oversight of the independent school sector. The following table offers such an overview in terms of level of funding as well as state oversight in areas subject to regulation such as curriculum, teaching, and administration.

Table: State Subsidies and Regulation of Non-State Schools in Selected Countries

	<i>Funding</i>	<i>Regulation</i>
Australia	High	Low
Austria	High	High
Belgium	High	High
Canada	Moderate	Moderate to High
Chile	High	Low
England / Wales	Low	Low
France	High	High
Germany	High	High
India	Low	Low
Ireland	High	Moderate
Japan	Moderate	High
Korea	Moderate	High
Netherlands	High	High
New Zealand	Moderate	Low
Norway	High	High
South Africa	Moderate	Low
Spain	High	High
Sweden	High	Moderate
United States	Negligible to Moderate	Negligible to Low

Source: Kober (2000a), West (1997), and authors' own research

In this representation, it appears that there is often, but not always, a correlation between the level of state support and regulation of the independent sector. Yet there is much diversity within these general patterns. Some countries such as India and China

3 This was associated with the Moderate (conservative) Party government, but this reform effort was in fact initiated by the previous Social Democrat government.

now rely extensively on the fee-based private sector to provide choice or extend educational services, while others such as New Zealand provide comprehensive choice primarily within the public sector. Some policymakers in Europe and Asia directly fund the private school sector, albeit to varying degrees, while voucher programs in places like the United States and Chile tie funding more directly to the consumer – the student – rather than to the provider.

There have been innovations emerging from quasi-markets. Without monopoly control over local educational resources, school leaders have had to assume more of a business mentality in considering the services they offer relative to other providers or competitors in the area – leading to a more diverse range of programmatic options in many localities. There are myriad examples of innovative practices in education quasi-markets. Researchers report a new emphasis on image management and marketing in schools in New Zealand and England/Wales, for instance (cp. Fiske/Ladd 2000; Gewirtz 2002; Lauder et al. 1999; Oplatka/Hemsley-Brown/Foskett 2002; Whitty/Power/Halpin 1998; Woods/Bagley/Glatler 1998). Whole sectors of new, low fee-based schools have started in Brazil, China, and India, where for-profit schools run their own research and development units for curricular innovation. Educators in Belgium indicate that they must be more innovative, effective, and responsive to consumers or they will lose students to the school's competitors (cp. Stossel 2006). Charter schools in the United States and Canada have been successful at bringing new, different, and often more relevant curricular programs to marginalized communities, and finding new ways of engaging parents. But simply listing innovations emerging from education quasi-markets tells us little about how quasi-markets actually foster innovation, or what types of innovations are more likely to be encouraged, or inhibited.

2. Innovation, Quasi-Markets and Education

2.1 Understanding Innovation

In order to assess the relationship between market mechanisms and innovation, it is important to have a sense of what constitutes “innovation” – a question sometimes lost in the rhetoric and assumptions about how mechanisms should work. But there are actually differing perspectives on how to perceive and understand innovation. For economists, innovations are changes that lead to improvements, as evident in areas such as productivity, communication, or service.⁴ Innovation is also generally considered to be part of a process of invention and scaling up to be commercializability, although the scale can be substantial, as with the development of a new vaccine,

4 Of course, not all innovations necessarily lead to improvements. For example, research and development efforts might not all reach the market, but “R&D” (research and development) is still squarely within the realm of innovation.

or smaller, as with improvements to cell phone service (cp. Lubienski 2003). Scholars studying innovation have added important insights on the distinction between “sustaining” and “disruptive” innovations – the former being improvements on products and services within a field, while the latter represent changes that take a product or service into a new dimension or create a new market, as in cell phones or iPods (cp. Christensen/Horn/Johnson 2008).

Following the Organisation for Economic Co-operation and Development (OECD) definition in the *Oslo Manual for Measuring Innovation* (2008), there are two general categories of innovation with regard to schooling, encompassing four different types. First, what can be called educational innovations include both product innovations and process innovations. These typically occur at the classroom level, involving teaching and learning. In education, *product innovations* involve a new or substantially different service offered to students, such as a curriculum package or other programmatic option. *Process innovations* in education focus on production and delivery techniques, such as on-line learning. Process innovations may be less evident to parents, but are important because they can produce gains in efficiency, as with an improved pedagogical approach (cp. Lubienski 2003).

A second category of innovations in the school sector involves what has been referred to as administrative innovations, which include both marketing and other organizational innovations (cp. Lubienski 2003). These innovations have less direct relevance for the classroom, but instead involve substantive changes in the structures or organizational behavior of schools. In education, many *marketing innovations* useful to firms in other sectors, such as pricing strategies, are unavailable to schools in publicly financed education.⁵ Marketing innovations are those that affect the position of a school within a school market, such as new advertising or semiotic strategies, or admissions policies (cp. Lubienski 2007). Other *organizational innovations* in education occur in the areas of management, administration, governance, or other institutional practices, and can include things such as contracting, employment, or lines of authority.

2.2 Evidence of Innovation in Education Markets

A handful of studies have reported relatively few educational innovations emerging from various quasi-markets (e.g. Bodovski/Farkas 2007; Center on Education Policy 2000; Dierkes 2008; Fiske/Ladd 2003; Hirsch/OECD 1994; Lubienski 2003). However, an overall assessment in this regard depends largely on how innovations are perceived. Although the record is mixed and somewhat uneven, there are indeed abun-

5 Although schools can impose implicit or explicit costs to attract preferred clientele (cp. Lubienski/Weitzel/Gulosino 2009).

dant examples of some types of innovations in several education quasi-markets. Here, using the OECD categories of innovation we offer examples of different types of innovation in education quasi-markets. This list is by no means meant to be exhaustive or even comprehensive, but simply illustrates the patterns in innovation in education.

Organizational Innovations

Because quasi-markets typically involve innovations in policy to promote innovations in other areas, there are myriad examples of organizational innovations in education quasi-markets. For example, New Zealand policymakers sought to promote organizational innovations by granting substantially more autonomy to schools. Similarly, the charter school movement in North America has been recognized as an outstanding innovation in government (cp. Center for Education Reform 2000). The same could be said for policies that move school systems toward more quasi-market models in places such as England and Wales and Australia, and the introduction of voucher plans in Sweden and Chile. In turn, these policy changes have shaped a number of innovations within educational organizations, in how schools are organized and administered. For instance, in comparative analyses of school revenues, processes, and achievement in public and subsidized (voucher) private schools in Chile, Parry (1997a, 1997b) documented notable instances of entrepreneurial behavior from administrators in the voucher-subsidized secular schools, with innovations in hiring and teacher salary arrangements.

Marketing Innovations

While organizational innovation is associated with quasi-market reforms as the vehicle that moves these policies forward, the area where competitive incentives generated by these reforms appear to have sparked the most innovation is in terms of marketing. Observers in a number of nations have pointed to the rise of a range of promotional activities (sometimes juxtaposing these to a perceived paucity of other kinds of innovation).⁶ For instance, research from several countries highlights the use of uniforms in schools to shape a public image of the school (cp. Gewirtz/Ball/Bowe 1995; Meadmore/Symes 1997; Whitty/Power/Halpin 1998); attention to other physical features of a school are also increasingly important (cp. Fiske/Ladd 2000; Mikuta 1999; Whitty/Halpin/Power 1998; Wilgoren 2001). Lauder et al. (1999) interviewed principals regarding the ways that reforms have impacted their schools, particularly in terms of marketing and its effects on operations. Parry (1997a) found Chilean schools were marketing themselves often by adopting English-sounding names. Schools in Sweden have been giving away free laptops and iPods to attract prospective students (cp. Rising 2008). Both research and journalistic reports indicate that schools in a number of contexts have also created more commercial-style brochures to promote themselves, and are using the Web as well (cp. Cohen 2002; Copeland 1994; Kates

6 On these juxtapositions, see, for example, Fiske/Ladd (2000), Hirsch (1994), and Lubienski (2003).

2001; Mathews 2009). “Marketing” can also refer to more general efforts to position an organization within a market through efforts such as price competition, product placement or packaging. Thus, according to the OECD framework, marketing innovations in education can include “a new way of pricing the education service or a new admission strategy.” Even without price strategy options, many subsidized schools in places such as France and the US have the ability to impose additional direct or informal costs on consumers through innovations such as admission interviews, required parental contracts, location and privatized transportation (cp. Glenn 2003).

Process Innovations

We can point to some evidence of process innovations in education quasi-markets. In a study of national voucher plans, Carnoy (1998) identified organizational innovations in the area of cost-cutting measures such as increased class-size, which could also be considered process innovations. Technology also offers a number of examples of process innovations. For example, computer-assisted learning, online learning and distance learning all represent potentially significant changes in delivery systems for schooling – although there is some dispute on the degree to which some of these technologies have really penetrated educational processes to represent substantive improvements in teaching and learning (cp. Cuban 1986, 2001). The literature attempts to distinguish the value-added effects of school processes from other influences on achievement, but the record is mixed on the extent to which competition one would expect in quasi-markets actually produces more effective processes, and thus greater gains in academic achievement (cp. Langouet/Leger 1991, cited in: Glenn 2003; Meuret 2004; Angus 2003; Dijkstra/Dronkers/Karsten 2001, 2004; Dronkers 2004; Rutkowski/Rutkowski 2009; Fuchs/Woessman 2007; Vandenberghe/Robin 2004).

Product Innovations

Firms in competitive environments have the strategic option to either focus innovation efforts on improved processes or improved products. Process innovation could lead to a better product, or might also result in more efficient productive processes that could lower the price of a product or provide additional resources for “R&D,” or “research and development.” Typically (but not necessarily), process and product innovations can be distinct for goods, but the two kinds of innovation may be indistinguishable for services, where the product is itself a process. To a significant extent, education reflects this dynamic. Fiske and Ladd (2000) note in New Zealand the trend toward themes for school missions, including athletics, vocations (construction, performing arts, early-childhood education, hospitality and tourism), a school for teenage parents, and one school based on Howard Gardner’s theories of multiple intelligences. The Tomorrow’s Schools reforms have led to relatively little supply-side diversity, and it is fair to say that “while the reforms permit innovation, they do not promote it in a systematic manner” (p. 249). Also, exhaustive studies in the British quasi-market find little evidence of academic innovations, despite this being an explicit policy objective for quasi-markets (cp. Glatter/Woods/Bagley 1997; Halpin/

Power/Fitz 1997; Power/Fitz/Halpin 1994; Power/Halpin/Fitz 1994; Woods/Bagley/Glatler 1998).

Referring to the OECD's framework for innovations, charter schools in the US and Canada (Alberta) fit the same patterns as other such autonomous, subsidized schools in other quasi-market contexts. Charter schools are, by most accounts, producing substantive marketing and organizational innovations, although the other function assumed in their design, creating innovations, has produced mixed results. Charter schools have developed and advanced an array of innovations (cp. Anderson/Marsh 1998; Gifford/Phillips/Ogle 2000; Glassman 1998; Vanourek et al. 1997; Plank/Sykes 1997). However, it is not clear the extent to which these reported changes were caused by charter competition, although it is important to note that these changes tend to land mostly in the areas of marketing and organizational responses.

A close analysis of charter school reports finds fewer product and process innovations, particularly at the technical core: in the classroom. As with other educational quasi-markets, charter schools appear to be less adept at generating completely new options, but instead seem well situated by virtue of their autonomy and incentives to promote the diffusion of options to new contexts. Rofes (1996) reported charter school innovations that were also evident in the wider public school sector, but the charter schools are bringing these practices to communities that previously lacked them, or are focusing such practices on specific populations. Charter schools also provide such a vehicle for other innovations such as small class size (cp. Kane 1998), multiage grouping and integrated curricula (cp. General Accounting Office 1995), and character and citizenship training (cp. Rosenblum Brigham Associates 1998).⁷ Thus, charter schools appear to be making their greatest contribution in terms of disseminating alternative practices and thereby increasing the range of options from which parents in a given community may choose. It appears that charter schools are markedly more successful in disseminating than generating innovations in classroom practice (cp. Lubienski 2003, 2008). It might be more accurate to conceive of these schools not so much as "R&D centers" or "laboratories" of new educational practices, but as showrooms or greenhouses.

7 The Rosenblum Brigham Associates (1998) report contends that charter schools are re-combining pre-existing practices, rather than developing new practices: "specific practices are not the key innovation implemented in charter schools, but rather the integration of practices around a central vision, and the balance of autonomy and accountability that allows the schools to match practices (including hiring) to the vision." Perhaps the most comprehensive list of innovative practices in charter schools comes from the Center for Market Based Education's report on Arizona charter schools, with examples drawn from case studies (cp. Gifford et al. 2000).

3. Policy Implications

Overall, there is little evidence that process and product innovations emerging from the competitive incentives of quasi-markets appear at a greater rate, or deeper within the organizational structure, than do innovations emerging from other sources. In fact, there are myriad examples of substantial and beneficial innovations flowing from the public sector, including the creation of quasi-markets themselves. For instance, Parry (1997b) sees few new pedagogical or classroom practices resulting from the competitive effects generated by the Chilean voucher program; instead her survey of school programs demonstrates that “public schools were more likely to have innovative programs” (p. 249). On the other hand, sectarian and proprietary schools offered more traditional curricula and pedagogical approaches (see also Carnoy/McEwan 2003). In the US, public schools have introduced a number of innovations outside of competitive pressures from quasi-markets, including recent efforts such as a hybrid school that offers secondary and tertiary credit (cp. Hernandez 2009) amongst others. Findings such as these raise questions about the singular potential of quasi-markets to promote innovation.

3.1 Consumer Markets and Education Markets

Many assumptions regarding diverse and innovative options are often premised on perceptions of innovations in markets for consumer goods – toothpaste, cars, or luxury items, for instance (cp. Gintis, in: Glass 1994; McGriff 1996). In arguing for markets in education, Coulson (1999, p. 217) of the libertarian Cato Institute claims we now have a “huge range of transportation choices” thanks to the market. Coulson’s solution to education stagnation is a free market as is evident with consumer goods. This position echoes Milton Friedman’s (1995) insistence that innovation flows from free market forces, since that is the case with consumer goods: “As in all cases, the innovations in the ‘luxury’ product will soon spread to the basic product.” Nevertheless, this allusion to luxury goods ignores crucial differences between idealized markets for consumer goods and real quasi-markets for education services. Inasmuch as the predominant “innovation” of selection is based substantially on sorting students by socioeconomic status (SES), it is one innovation in a “luxury product” that cannot, by its nature, filter down to lower-SES communities and schools. Furthermore, the consumer market metaphor perverts the theoretical dynamics of competition as it might manifest itself in the emergence of innovative, experimental, and diverse options for consumers (cp. Ball/Gewirtz 1997; Gewirtz/Ball/Bowe 1995; Lubienski 2007). Hence, in a physically constrained setting such as a school building, revenues available for experimentation and development are necessarily limited by the set per-capita funding level.

3.2 Position, Emulation and Duplication in Competitive Education Markets

The consumer-choice premise of competitive schooling assumes market-like conditions, but these conditions in fact can both encourage and limit innovation. While reformers assume that markets for consumer goods create a diversity of options, an examination of the political economy of consumer markets indicates that these assumptions ignore some standardizing effects of competition. Depending on the circumstances, a competitive market can also have constraining effects on experimentation, and foster duplication instead of diversity. In a system of consumer choice, the logic of markets dictates that providers should stake out positions of advantage in order to command the patronage of the largest possible group of consumers. However, success breeds emulation. If something is found to “work” in terms of attracting consumers, competitors will try to duplicate that success by duplicating whatever brought on that success – particularly if such a strategy is easier than engaging in one’s own costly “R&D”. As noted earlier, this emulation is readily apparent from the research on the re-emerging traditionalism in the competitive school environment in England and Wales (cp. Fitz/Halpin/Power 1993; Glatter/Woods/Bagley 1997; Power/Fitz/Halpin 1994; Power/Halpin/Fitz 1994; Woods/Bagley/Glatter 1998). This points to the inherent tension facing schools with the freedom to innovate, but the requirement to be accountable for results as judged on a uni-dimensional standard of academic achievement and consumer approval. Innovation presupposes freedom to experiment (and fail).

Part of the reason why quasi-markets do not foster as much innovation as expected may be the assumption that consumer demand shapes provider response. Indeed, in some markets, producers or providers can select their consumers. In education, this means that schools may sometimes choose students by embracing exclusive or narrow missions, or through locational decisions (cp. Lubienski/Gulosino/Weitzel 2009). This has been the case in New Zealand and Britain, as schools set out criteria for prospective students to meet in order to better pursue the school’s mission or philosophy (cp. Edwards/Whitty 1997; Fitz/Halpin/Power 1997; Walford/Pring 1996; Whitty/Power 1997). This is an issue at the system level in so far as equity is an overall goal, but competitive incentives are directed at individual school-level.

Conclusion

Market mechanisms of consumer choice and competition between autonomous providers are integral to quasi-market education reforms for several reasons, including liberating parents in their “right to choose,” promoting institutional efficiency, and raising academic achievement. Yet these goals assume a diverse range of options

from which parents may choose in order to infuse meaningful substance into those choices. In view of state education systems thought to be inherently standardized by their “captured” status as public sector bureaucratic monopolies, quasi-market reformers argue that choice and competition will create conditions and incentives for autonomous schools to develop new classroom innovations that give parents real options while promoting more effective teaching and learning. Based on the cases reviewed here, it appears that such reforms can promote innovations at certain levels of the school organization, although they are somewhat limited in encouraging classroom-level innovations.

There are a few ways to interpret the evidence. First, quasi-market reforms appear to be more successful in creating innovations in marketing and management than in generating new classroom practices, although they seem particularly adept at disseminating alternative practices. But while they contribute to a diversity of options in many local communities, this diversification sometimes appears in many cases to be based on social characteristics of student intake and, thus, hierarchical ordering of institutions, rather than a horizontal range of equally valued, but substantively different, curricular and pedagogical approaches. The fact that public sector policy interventions led to innovations in classroom practice in Chile and England/Wales, and to the development of charter schools in North America, represents an interesting insight. This review suggests the importance of public policy interventions, in addition to market mechanisms of choice and competition, for inducing different types of innovations. Secondly, it appears that some quasi-market reforms advanced from an overly simplistic view of market mechanisms for schools, and in how schools would respond to competitive incentives. This perspective is particularly problematic when applied to an area as complex and contested as education. There, unclear and conflicting goals for schools obscure the reasons for innovation. Issues in several areas suggest the need to re-think the potential for market models to generate classroom-level innovations in teaching and learning.

If educational innovation truly is the goal of market-oriented education, reformers may do well to consider the conditions in which competition and choice lead to innovations and diversity in provision and product. That is, it is not so much a question of whether or not quasi-markets lead to innovation in education, but how to foster desired types of innovation in education. This analysis is intended to offer insights into policies on school quasi-markets. It seeks to inform debates by exploring one of the primary assumptions underlying reform efforts. The experiences of numerous nations provide important evidence on the role of quasi-market mechanisms in education, and offer a compelling reason to consider the logic of reformers in examining expectations of product and process innovation and diversification for autonomous schools.

Based on evidence reviewed in this analysis, it appears that there is no direct causal relationship between leveraging quasi-market mechanisms of choice and competition in education and inducing educational innovation in the classroom. In fact, the very causal direction is in question in view of the fact that government intervention, rather than market forces, has often led to pedagogical and curricular innovation. Accounting for these tendencies not only helps us understand the record of autonomous schools in promoting classroom innovation, but helps us evaluate the potential for other quasi-markets to cultivate new approaches to teaching and learning, or for standardizing provision and product.

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