

School vouchers and the privileges of choice

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Published by Education International - July 2017

ISBN 978-92-95109-34-6 (PDF)

No Paperback

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Table of Contents

Introduction	3
The core argument for school vouchers	6
Diverse voucher systems, diverse contexts	9
School vouchers, the evidence and ideological claims	15
Social justice and the conundrum of school choice	19
The action and reactions of teacher unions to school vouchers	25
References	27



Introduction

Since the 1980s, the debate on school vouchers has been prominent along with the more general efforts to institute market forces, school choice, and privatisation in education sectors in many countries. Across the globe, school vouchers come in many forms, but essentially, a school voucher constitutes a certificate of public funding of a specific amount that parents of students are being offered to use in any school - usually private - of the parents' choosing that accepts such vouchers (Carnoy, 2017, p.2). In this way, vouchers usually allow parents to use public funds to secure their children's education at public schools as well as private schools (Ladd, 2002).

School vouchers form a key element in promoting privatisation and instituting 'quasi-markets' in education (Ball and Youdell, 2008, p.18). They hence serve as levers to undermine public provision of education - in more or less dramatic fashion and over shorter or longer time. In this way, school vouchers contribute to deepen school segregation and entrench existing inequalities in schools and societies. Conjured as a simplistic mirage by economists (most influentially by US economist Milton Friedman) sanctified by 'choice' and 'free market' advocates, school vouchers is an ideological tool to broaden the opportunities for the privileged to exploit their privileged positions here and now and maintain and pass them on to their offspring. From the perspective of educators and anybody committed to equal opportunities, democratic accountability, and teacher professionalism, vouchers are a step in the wrong direction.

Today, school vouchers remain a much debated and controversial policy instrument. Most recently, the Trump administration's strong commitment to vouchers in the US has reignited the debate (Turner, 2017; Welner, 2017), reflecting the particularities of that context. However, the debate on vouchers is by no means restricted to the US. It must be emphasised from the outset that the specific features of voucher systems vary widely in terms of geographical scope, public-private mix, and eligible target groups of parents and students. Furthermore, vouchers are subject to innovation and 'mutations', for example by the emergence of tax credit 'neo-vouchers' across numerous US states since the late 1990s (Carnoy, 2017; Center on Education Policy, 2011; Welner, 2017).

The objective of this Discussion Paper is to spark reflection and discussion among EI member affiliates by problematising school vouchers as a viable policy instrument. In doing this, the entry point for the Paper is that the core argument for school vouchers needs to be revisited in order to expose its serious shortcomings, and the essentially ideological nature of its premise-conclusion structure. Moreover, the Paper shows that no easy answers or universal 'solutions' exist in the vouchers debate. Rather, the debate and policies on vouchers calls for context-specific (re)actions from teacher unions, considering their very different educational, political and socio-economic contexts. In this respect,

the Paper argues that embedding the vouchers debate in the often dominant 'raising standards' debate is by no means sufficient and in fact might be misleading, because it serves to deflect and derail the debate from the more fundamental debate on the public/private mix in educational provision, democratic accountability and social justice.

Three points help to summarise the nature of this Discussion Paper.

First, the issue of school vouchers is closely related to those of school choice and privatisation in education sectors. These issues have been discussed in previous Education International reports and papers - in which the main evidence and effects of school vouchers were also discussed in some depth (see e.g. Ball and Youdell, 2008). The Discussion Paper builds on such existing literature reviews to raise a more general debate and make a case against school vouchers, drawing on the evidence as well as Wolfgang Streeck's (2014) concepts of market justice and social justice.

Second, the Paper does thus not pretend to be exhaustive in terms of relevant themes or geographical contexts associated with school vouchers. In fact, we know very little about the impact of vouchers in most of those geographical contexts where they have been introduced. Whilst an international outlook is pursued, the Discussion Paper is skewed towards Chile, Sweden, and the US – privileged contexts in terms of the level of attention given to them in terms of research. The fact that research evidence, and the mere documentation of voucher systems in other countries is much sparser, highlights the need for common work and exchange between EI affiliate members.

Third, whilst education, teaching and learning, and the institutional arrangements they refer to, are shot through by values and politics, the debate on school vouchers is exceptionally politicised and polarised. There is an interesting paradox at work here which needs to be spelt out. On the one hand, vouchers are part of efforts to *depoliticise* the work and professionalism of educators by instituting the market form in education, rendering teaching and learning subject to 'objective' performance results and consumer choice. On the other hand, the *debate* continues to be characterised by many politically charged contributions. In particular, think tanks and consultancies with various political and ideological preferences have been very invested in promoting or dismissing school vouchers as a viable policy instrument (Lubienski, 2016). This makes for confusing reading when trying to make sense of the material on school vouchers. However, it should be highlighted that in the more critical academic literature that takes a broader perspective on the impact and 'effects' of vouchers in school systems and societies, there is consensus that school vouchers - across the very diverse contexts where they have been introduced and been made subject to research - have harmful effects in terms of school segregation, inequality and teacher professionalism. The Discussion Paper will refer to this scholarly evidence in more detail in Sections 4 and 5.

The Discussion Paper proceeds with first outlining the core ideological arguments for vouchers, followed by Section 3 with an overview indicating the diversity of voucher plans globally. Subsequently, Section 4 discusses the research evidence and the ideological claims underpinning the argument for vouchers. Section 5 broadens the perspective by

putting the vouchers debate in the context of school choice and implications for social justice. Finally, Section 6 concludes with some observations about possible responses from teacher unions to the issue of school vouchers.



The Core Argument for School Vouchers

One of the most influential outputs on school vouchers was put forward by US economist Milton Friedman in an essay from 1955. In many ways, the ideas that he put forward in this essay might be understood as the archetypical expression of school vouchers as a policy instrument. Friedman wrote in a US context, but he characteristically believed that his market-oriented liberal ideas were universally applicable. This section presents his argument for school vouchers, and subsequent sections will expose its essentially ideological nature and serious shortcomings when applied in real life education systems.

Friedman's essay today – more than 60 years later – to an astonishing degree reads like a summary of the bulk of education reform undertaken globally since the 1980s; national and local government financing and setting out the broad objectives of “the education industry” (Friedman’s term), with operation decentralised to schools, consumer choice, private provision, competition, and teacher compensation exposed to the unleashing of market forces. For Friedman, school vouchers were a central instrument to create markets in education sectors:

“Governments could require a minimum level of education which they could finance by giving parents vouchers redeemable for a specified maximum sum per child per year if spent on “approved” educational services. Parents would then be free to spend this sum and any additional sum on purchasing educational services from an “approved” institution of their own choice. The educational services could be rendered by private enterprises operated for profit, or by non-profit institutions of various kinds. The role of the government would be limited to assuring that the schools met certain minimum standards such as the inclusion of a minimum common content in their programs, much as it now inspects restaurants to assure that they maintain minimum sanitary standards.” (Friedman, 1955)

With the interjection of competition, a variety of schools and flexibility would be promoted, resulting in more educational opportunities for children. Teachers are mentioned once in the essay - when Friedman points out that a major benefit of a voucher system “*would be to make the salaries of school teachers responsive to market forces*” and the associated “*changes in conditions of demand or supply*” (Friedman, 1955).

For Friedman (1955), school vouchers were hence closely associated with parental choice and the privatisation of educational provision. Due to the assumed effects of the ‘invisible hand of the market’, school vouchers are claimed to raise student learning outcomes and

promote economic growth, societal progress, equal opportunities, and ultimately freedom and liberty. In this respect, the basic challenge for Friedman was to separate the financing from the running of schools as a means to break the government's alleged 'monopoly'. Friedman was aware of the multiple ways that the principles could be put into operation, including the 'mixed' arrangement where governments would continue to administer some schools, with parents being given the opportunity to send their children to privately-run and government-approved schools.

40 years later and in line with Friedman's ideas, Edwin West – a proponent of school vouchers - in a World Bank publication summarised four common objectives of voucher systems:

1. Consumer choice; with parents as the real consumers of education.
2. Personal advancement; people want to shape their own destinies, and school choice stimulates interest, participation, enthusiasm, and dedication.
3. Promotion of competition; challenging the monopoly of public schools by making them compete with each other and with private schools, thereby reducing costs and increasing quality and innovation.
4. Equal opportunity; follows logically from the first three principles and is expressed in the objective of increasing access to private schools. Equal opportunity is embodied particularly in selective or targeted voucher schemes that give low-income families greater access to private schools (West, 1997, pp.84-85).

In practice, Martin Carnoy (1998) pointed out that school vouchers tend to operate through giving public grants to public and private schools participating in the scheme, based on the number of pupils enrolled. He also noted - cf. Friedman (1955) and West (1997) – that the common political appeal of school vouchers tends to be associated with the promise of choice for consumers and investors, whereas economically, competition among private and public schools is claimed to reduce costs without sacrificing quality.

There is a seductive simplicity to this core argument for school vouchers and choice, and as we know today, it has had huge trenchancy across the globe since the late 1970s. Today, these ideas continue to be much propagated internationally by think tanks, business entrepreneurs and policy-makers keen to put in place variations of school choice and voucher plans (see Lubienski, 2016; Tooley, 2014; see Jha and Buckingham, 2015, for a proposal on charter and for-profit schools in Australia, and Ashenden, 2015, for a critique; see Glenn, 2003, and Nguta, 2015, for a proposal on vouchers on South Africa, and Ndimande, 2016, for a critique of school choice policies in the country).

Section 4 will return to the fact that when applied in the complexities of real life, the argument for school vouchers falls apart, and the nature of its premise-conclusion structure is exposed for what it is: An ideological proposition that fails to deliver what it promises - despite being endlessly repeated by those advocating privatisation in education. Before doing this, Section 3 below focuses on where school voucher systems have been put into operation, thereby indicating the diversity of features in actual voucher



systems as well as the socio-economic contexts in which they have been introduced. Recognising this very diversity highlights the simplistic naivety of Friedman's (1955) universal claims.

Diverse Voucher Systems, Diverse Contexts

In outlining where school vouchers have been put into operation, we need to clarify what constitutes a voucher system. In the literature, various definitions have been employed, ranging from more narrow - focusing on the definition of 'classic' or 'conventional' vouchers - to more expansive, encompassing targeted individual scholarships, 'in-direct' voucher payments to schools, and school self-management policies (see Figure 1). Under all circumstances, voucher systems in practice take many different forms and might be more or less indirect - or 'hidden' - in promoting school choice and privatisation of educational provision (cf. Ball and Youdell, 2008).

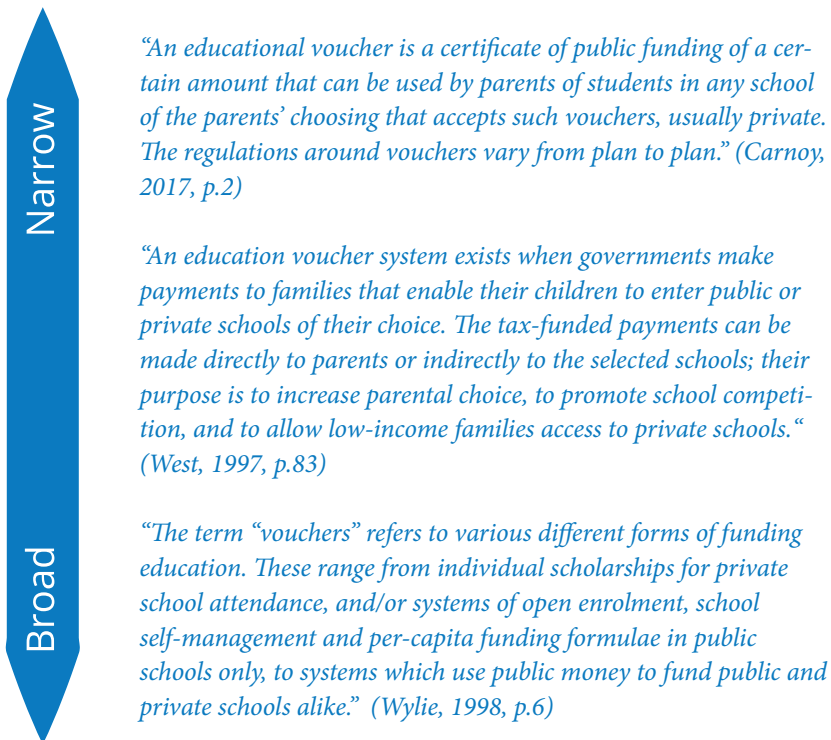


Figure 1. A continuum from narrow to broad definitions of school vouchers

The research evidence often points to Chile, Sweden, and parts of the US as hotspots for vouchers globally. The features of these voucher systems differ substantially. The voucher systems in Chile and Sweden stand out globally in terms of their 'pure' application of Friedman's proposal for instituting market forms in education, with opportunities for school providers to make profits.

In Chile, school vouchers were first introduced by Augusto Pinochet's military dictatorship in the beginning of the 1980s, as part of a 'degovernmentalization' free-market policy cluster, heavily inspired by Milton Friedman's principles. The voucher scheme enabled competition between fully subsidised, deregulated private schools (Catholic, Protestant, and non-religious) competing for pupils with deregulated municipality-run public schools - as well as non-voucher private schools. One key element in the plan was privatising teacher contracts, thereby effectively eliminating teachers unions, collective bargaining, and teachers' previous status as civil service employees. From the 1990s, changes were made in the voucher plan, but its main features remain in place today. We should note that though the Chilean voucher plan is often suggested to be nation-wide, the concentration of private schools is much higher in metropolitan neighbourhoods. The more rural parts of the country are hence much less affected by the voucher plan (Carnoy, 1998; Hsieh and Urquiola, 2006; McEwan, 2002; McEwan and Carnoy, 2000; Valenzuela et al. 2014).

In the very different context of Sweden, yet drawing on similar arguments of the virtues of choice and competition, vouchers were introduced in the beginning of the 1990s, when all students were given free choice between publicly and privately run schools. The voucher plan was key to the dramatic changes taking place during the 1990s as the Swedish school system turned from being one of the most centralised educational systems in the OECD into one of the most decentralised. Moreover, the efforts to stimulate private sector provision constituted a major break with the previously existing arrangements where privately run schools were very rare (Lundahl, 2002, 2016; Lundahl et al. 2013).

In comparison, the voucher initiatives in the US have been considerably less sweeping than those in Chile and Sweden. Importantly, the primary target group for school vouchers in the US has tended to be children from low-income families (thus providing an example corresponding with the broader definition of voucher plans, see Figure 1). Whilst less sweeping in nature, school voucher plans continue to be instituted in various US states, and the current Trump Administration appears committed to hasten this development (Welner, 2017).

In the US, the first private school voucher programme was introduced in 1990 – the Milwaukee Parental Choice Program in the state of Wisconsin. Initially around 1000 pupils (1 percent) of Milwaukee Public Schools students received vouchers (worth the per-pupil equalised state aid to Public Schools) enabling them to attend private, non-sectarian schools within the city. The programme was expanded later in the 1990s to also include religious schools – an issue which has later been repeatedly discussed in courts across the US because of the potential infringement of constitutional law (Center for Education Policy, 2011; Ladd, 2002; Molnar, 2001). Currently, there are voucher systems in place in

16 US states, targeting around 175,000 students (3.3 percent of the US private school population).

Construed as tax credit scholarship programmes, so-called 'neo-vouchers' have come to be more widespread in the US as a particularly convoluted and 'hidden' way of promoting privatisation in education provision. With neo-vouchers, the state's role changes from paying for vouchers to issuing tax credits to the users. In some US states, neo-vouchers are open to a wider range of parents than is the case with conventional school vouchers. They were first introduced in Arizona in 1997 and currently exist in 17 states, targeting around 250,000 students. Betsy DeVos, the current US Education Secretary, is a strong proponent of school vouchers, and it is expected that federal-level initiatives will soon be taken to promote neo-vouchers for use in private schools across the US, for example through tax reforms (Carey, 2017; Welner, 2017).

In addition to the oft-cited examples of voucher systems in Chile, Sweden, and the US, we should note that other school systems display voucher-like features, corresponding with the broader definitions in Figure 1. Argentina is an example of an indirect school voucher system. During the 1940s and 1950s legislation was passed to subsidise teacher and principal salaries in private schools – up to 80 percent in tuition-fee charging schools, and full coverage in private schools not charging tuition. Unfortunately, the subsidies system – based on a sliding scale including criteria such as the size of tuition fees, socioeconomic background of students, and educational 'needs' in the community - has not always been applied in a consistent manner (McEwan, 2002). McEwan (2002) notes in his comparison of Chilean and Argentinian policies that Chile's policy of per-student subsidy allows private schools greater latitude and autonomy in resource allocation for personnel and other investments (McEwan, 2002). However, in line with the general shift towards a more market-based logic in the Argentinean school system, the central Province of San Luis launched the Experimental Schools Project ('Las Escuelas Experimentales' or 'Autogestionadas') which drew heavily on the US Charter Schools model, with per-student subsidies accompanying greater autonomy to school providers (Feldfeber, 2003; Pelayes, 2011).

Moreover, Wylie (1998, p.66) pointed out that 'full voucher systems' have been in place in Belgium, the Netherlands, and France, for numerous decades or even centuries, *"to accommodate strong religious, cultural, or language differences, and to avoid costly social divisiveness"*. They thus pre-date Friedman's proposal and were adopted for quite different objectives than those in Chile and Sweden. For example, in the Netherlands, national voucher plan subsidising private religious schools was the outcome of a political compromise between Catholics and Protestants in the first decades of the 20th century (Carnoy, 1998; Wylie, 1998). These 'full voucher systems' are of the indirect type - with substantial public grants to private schools based on enrolment. Though relatively more recent in origin (from the mid-1970s), the publicly subsidised 'integrated schools' (mainly Catholic) in New Zealand also qualifies as an indirect 'full voucher system' (Wylie, 1998). Furthermore, the school system in Denmark might also be included in this category. The distinctive 'freeschool movement' ('friskolebevægelsen' in Danish) was based on ideas

of democratisation of schooling and training provision in the 19th century, and direct state subsidies to private schools has for decades covered about 75-85 per cent of costs, complemented by tuition fees paid by parents. In her piece on school segregation and 'white flight' in Denmark, Rangvid (2010) thus characterises the Danish comprehensive school system as a 'universal vouchers' system, pointing out that choosing private schools are within reach for *most* families.

Finally, considering the broader definitions of school vouchers, the trailblazing Academies movement in England over the past 15 years also constitute an indirect school vouchers system (Junemann and Ball, 2013). Introduced in 2002, Academies (from 2011 complemented by Free Schools, loosely modelled on the Swedish voucher plan) are independent schools, contracted out to a wide range of sponsors (entrepreneurs, business, charities, faith groups), removed from local authority control and funded directly by central state government. In addition, the main features of Charter Schools in the US correspond with an indirect vouchers system, though the institutional arrangements for finance, accountability measures, autonomy, collective bargaining, etc. vary considerably in the 43 states with Charter School laws (Education Commission of the States, 2017; NCES, 2017).

In the discussion of characteristic features of school vouchers, and their impact, it might be a slippery slope to adopt the most expansive definition of what constitutes a school vouchers system, thereby conflating vouchers with a range of policy instruments (decentralisation, open enrolment, per capita funding, etc; see Figure 1). These might well form part of a voucher plan, but it could also be the case that they are not. In the mid-1990s, West (1997) was able to produce 20 examples of voucher systems existing in Bangladesh, Belize, Canada (five provinces), Chile, Colombia, Guatemala, Japan, Lesotho, Netherlands, New Zealand, Poland, Puerto Rico, Sweden, UK, and US (Milwaukee and Cleveland). Whilst this list is an interesting inventory, the features of these plans appear to vary as much as they have in common. Considering that they are also situated in very different social contexts, it is difficult to make sense of them collectively as sharing the features of 'voucher systems'. Moreover, it is crucial to note that the research evidence (cf. the next Section) shows that when it comes to the impact of vouchers, school choice and equal access, the devil tends to be found in the 'detail' of institutional arrangements, and how the voucher plan actually works in specific social and political contexts.

Summarising the above discussion on the diversity of voucher plans and the social contexts into which they have been introduced, four basic points should be spelt out:

First, school vouchers have been introduced in a range of very different school systems – and they have been the subject of debate in far more contexts. A basic condition for vouchers being a meaningful policy instrument is that it is possible to create a 'quasi-market' with real choice for parents and students. In rural locations with low population densities, school vouchers thus appear irrelevant as a policy instrument. Fundamentally, the promotion of school vouchers is closely related to the emphatic turn globally towards liberalisation, deregulation and decentralisation of public services from the late 1970s. This involved a shift from hierarchical state 'government' towards more 'polycentric'

network governance (Junemann and Ball, 2013). Vouchers thus have implications for the distribution of labour related to education governance (*who* does *what* and *how*?) and for the scope of democratic participation. In this respect – and in with Friedman’s (1955) ideas – the market form institutes a ‘bi-dimensional pattern of educational control’ (Moutsios, 2000) in the state-school nexus, with local education authorities likely to find themselves sidelined and have their functions reduced or cut. This shift towards ‘network governance’ has serious implications for teacher unions in terms of possible strategies, consultation and bargaining arrangements, and work on the ground with local authorities.

Second, some voucher systems are ‘full’ or ‘universal’, with all students being eligible for vouchers at a particular level of education. Other voucher systems target specific groups, usually students from low-income backgrounds (Ladd, 2002).

Third, in the discussion of the virtues and detrimental effects of market mechanisms, it is worth recalling Lubienski and Yoon’s (2017, p.3) cautious remarks:

“While researchers, philosophers, and policymakers may debate many of these issues, one increasingly obvious response is that the answers to these questions can vary considerably across contexts, depending on policy specifics, market structures, institutional landscapes, demographic variations, and so forth. Thus, while market-mechanisms such as consumer choice might appear to function efficiently in some respects (but not others) in cram schools in East Asia, there may be noticeable areas of market failure as the private, for-profit sector purports to meet the needs of under-served students in the tertiary sector in the US. Markets can create opportunities that might otherwise be unavailable in the low-fee sector in India or Africa, but the same forces can shape the exclusion of students in New Zealand, Australia, or Chile. Some contexts present more developed markets, or more regulated markets, while others reflect more unsettled conditions, or a more laissez-faire approach to market management. ... Some markets operate in contexts characterized by high levels of long-standing social inequality, while other societies that have long valued social equality may use markets to enhance innovation in education, or to try to meet the particular needs of new citizens.”

In a similar manner, Hsieh and Urquiola (2006, p.1499) on the basis of their empirical research in Chile argue that *“it should be clear that the underlying institutions and the precise details of the program implemented are critically important in thinking about the potential impacts of school choice.”*

In other words, contexts and proportions matter. For example, there would appear to be a world of difference between the (nearly) ‘universal voucher system’ in Denmark and the fundamental shake-up of the Swedish system which allows for profit-making, and where private equity firms have become major players in the market. And again a huge leap to experimental voucher programmes in India which take place in a quite different socio-



material context with a completely different trajectory of public education.

Fourth, it should be kept in mind that our knowledge of vouchers is limited *and* skewed; much of the literature on school choice overall has focused on a narrow range of outcomes (standardised assessment scores in major subject domains, typically reading and math) in a relatively narrow range of market types – principally in the US, Sweden and Chile. We know very little about voucher systems in other geographical areas and their impact on learning and school environments (Lubienski and Yoon, 2017, pp.3-4). However, what we *do* know from the existing evidence is that the grand claims of voucher advocates are not warranted.

School Vouchers, the Evidence and Ideological Claims

This Section shows that voucher plans, as levers for privatisation in educational provision, are underpinned by claims that are essentially ideological. We can thus discuss the implications of school vouchers on two mutually implicated levels: i) as a policy instrument introduced in diverse contexts, based on the existing – limited – evidence; and ii) as an ideological programme which fails to deliver what it promises. Centred on the research evidence on vouchers, the Section argues that on both these levels, school voucher plans run counter to aspirations to ensure quality in public sector educational provision, equal opportunities, social justice, and teacher professionalism.

Given the different social and material contexts, into which school vouchers have been instituted, it is hardly surprising that the evidence on the impact of school vouchers is mixed. Yet, two points stand out in the evidence,

1. There is no clear evidence concerning positive links between the introduction of school voucher systems and student learning outcomes. In fact, studies have also found negative effects (Carey, 2017; Carnoy, 2017; Center on Education Policy, 2011; Hsieh and Urquiola, 2006; Ladd, 2002; Levin, 1998; Lubienski, 2016; Lundahl et al. 2013; McEwan, 2002; McEwan and Carnoy, 2000; Welner, 2017; Wylie, 1998).
2. In promoting school choice and privatisation, school voucher plans have a negative impact in terms of educational inequality, school segregation, increased sorting and selective ‘cream-skimming’ of students, narrowing of the curriculum and teaching to the test (Ball and Youdell, 2008; Carnoy, 2017; Cobbold, 2017; Fiel, 2015; Hsieh and Urquiola, 2006; Levin, 1998, 2017; Lundahl et al. 2013; Valenzuela et al. 2014; Wylie, 1998).

Both these points undermine the claims that tend to be put forward by voucher advocates. In his succinct summary of the international evidence on school vouchers, Carnoy (2017, p.2) points out the disconnection between what the research tells us about vouchers and the continued and ideologically-driven push for vouchers:

“The lack of evidence that vouchers significantly improve student achievement (test scores), coupled with the evidence of a modest, at best, impact on educational attainment (graduation rates), suggests that an ideological preference for education markets over equity and public accountability is what is driving the push to expand voucher programs. Ideology is not a compelling enough reason to switch to vouchers, given the risks. These risks include increased school segregation; the loss of

a common, secular educational experience; and the possibility that the flow of inexperienced young teachers filling the lower-paying jobs in private schools will dry up once the security and benefits offered to more experienced teachers in public schools disappear.”

Since school vouchers are part of broader efforts to institute private sector participation in school provision, we can identify major overlaps with the evidence on the impact of privatisation on education sectors:

“In terms of the impact of privatisations on school performance and efficiency and student achievement some of the available research offers some evidential support for beneficial effects but there is also a great deal of evidence showing no effects or negative consequences. The status of this ‘evidence’ is often hotly contested. What is clear is that there is no firm basis in research that give support to arguments which suggest that privatised schooling is superior in terms of performance to regulated state provision of schooling. On the other hand, there is plenty of evidence from diverse national settings which indicates that privatisations, like choice and vouchers, lead to increased social segregation and that performative and outcomes-based policies distort pedagogy and lead to ‘teaching-to-the test’ approaches in classrooms and result in increases in students’ levels of stress.” (Ball and Youdell, 2008, p.105)

In reflecting on this evidence, and shifting our attention further towards the ideological nature of the claims underpinning voucher plans, we should note that Friedman in his 1955 essay emphasised choice and privatisation in education sectors, rather than cost-efficiency (Carnoy, 1998). For Friedman, vouchers are essentially a means to privatise education; whilst he assumed that privately managed schools can deliver educational services at a lower cost and that student learning outcomes improve, the impetus for school vouchers for him appears to have been the classical liberal project of diminishing the role of national and local government in educational provision. As Friedman (1955) put it, such “denationalization” (his term) would ensure that government serves “its proper function of improving the operation of the invisible hand without substituting the dead hand of bureaucracy.”

In other words, rather than adjusting the education industry for technocratic efficiency-maximisation, Friedman’s project was one of providing the conditions for individual freedom, competition and choice. Vouchers are in this respect proposed as an indispensable tool for reducing the role of government and introducing the market form and consumer choice in education.

Due to the ideological nature of the argument underpinning school vouchers, it is in fact hard to distinguish whether the privatisation of educational provision constitute a means or an end in itself. This is an important point to think about today, as the debate on school vouchers often *appears* very technical and depoliticised, focusing on whether vouchers

have a positive or negative impact on (a narrow range of) student learning outcomes - though it is often based on the opportunistic and politically biased use of research data (often from the US). Whilst the issue of 'raising standards' cannot be ignored, I would argue that it should not be overemphasised in building the case against school vouchers, as it deflects and de-centres the debate from the fundamental issue of the public/private mix in educational provision, democratic accountability and social justice. In other words, an excessive focus on 'raising standards' de-politicises the debate on what are essentially political questions. Furthermore, the 'raising standards' debate might be seen as misleading for two reasons:

1. Market forces in education are meant to promote diversity in provision, which in principle renders standardised assessment of student learning outcomes less relevant. The debate on vouchers and choice also encompass specific 'welfare' issues that might be impossible to quantify or not very relevant to compare across schools and systems (see Hsieh and Urquiola, 2006; Muralidharan and Sundararaman, 2015).
2. The more interesting and powerful evidence on school vouchers and choice concern their wider impact on the 'ethos' of schools, teaching and learning environments, segregation and equal opportunities. Particularly in its 'pure' applications in the Chilean and Swedish school systems, the detrimental impact of the market form in education is well-established (Hsieh and Urquiola, 2006; Lundahl et al. 2013; Valenzuela et al. 2014; see also Section 5 of this paper).

To summarise, the existing evidence shows that the argument for school vouchers is essentially based on ideological claims which do not correspond with the world as it *actually* works, but rather seeks to propagate a liberal market-centred view of how it *ought* to be - and to create a world according to that picture. The promises of the school vouchers do not hold up in practice; there is no substantial support to support the claims of school voucher advocates. On the contrary, voucher plans are more often associated with broader negative system-level effects, the precise nature of which reflects local and national circumstances - as Carnoy (1998, p.335) noted, the effect of a voucher plan on public education depends on the position public education holds in a society.

What should be emphasised is that school vouchers - once they are introduced - change the social dynamics of education sectors; the creation of market mechanisms in education has effects *across* the whole system (Lundahl et al. 2013), and these effects are 'deep' in the sense that they go far beyond any potential differences in student learning outcomes. Section 5 will go into further details with these 'deep' and harmful effects. The point to be made here is that a fixation on measuring and comparing outcomes might distract from the more profound effects of privatisation of public goods. This issue is all the more important considering that once policies are introduced, by sweeping reform or incrementally, they are very rarely reversed, and the effects cannot be undone.

How might teacher unions position themselves in the light of the evidence on school vouchers? The next section seeks to clarify some of the issues at stake by putting



the vouchers debate in a broader perspective, considering school segregation, the undermining of equal opportunities, and the endorsement of school choice by parents, the alleged consumers of education.

Social Justice and The Conundrum of School Choice

The problematisation of school vouchers as a lever for privatisation of educational provision raises more general questions concerning the place of education in society and changing notions of democracy and consultation with teacher unions. In this respect, the debate on school vouchers cannot be separated from that of privatisation - and the case against school vouchers should hence draw on that against privatisation, focusing on those contexts, where privatisation is harnessed for expanding school choice (cf. quotation above from Ball and Youdell, 2008, p.105).

Like other policy instruments, school vouchers are a sign of the times, forming one component in a cluster of policies that are mutually implicated and sustain each other. Public policy is certainly never fully coherent and unidirectional – some interventions might pull things in other directions. In this respect, it is remarkable that school vouchers have been adopted in such diverse ‘welfare regimes’ as Chile, Sweden, the US, etc. - and especially that the Swedish school system appears more ‘marketised’ than the US counterpart seen as a whole. Baggesen Klitgaard (2008) pointed out that the institutional arrangements for decision-making (with more veto-points in the US model) might help explaining this fact – and perhaps an acknowledgement in the US that elements that would further exacerbate existing levels of inequity should be avoided.

At the same time, Lundahl and colleagues (2013) note that the school curriculum in Sweden remains centred on democratic values, inclusion, human rights, and equal educational opportunities. Yet, the system-wide effects of marketisation that they report are similar with those reported in Chile and the US: School segregation, widening inequality, devaluation of teachers’ professional judgement due to the requirement of satisfying parents and students, the wasteful marketing efforts associated with performativity, benchmarking and maintaining appearances, grade inflation and emphasis on more ‘measurable’ teaching content. In short, a hollowing out of quality education as a public good as well as what is normally associated with teacher professionalism.

Moreover, Lundahl and colleagues (2013) raise the pertinent issue of effects *across* the school system; in Sweden, much of the political and public debate about educational matters has been heavily focused on the “free-schools” and their profit-making, although marketisation affects *all* schools - whether public and independent – and their staff and students in numerous ways. In particular, Johanna Jaara Åstrand (2016), Chair of the Swedish Teachers Union, points out that a focus in school policy on profit levels distracts from discussing more fundamental issues, such as the actual quality of education, the working environment - and the current school financing regulations and distribution of

resources which provide the very basis for profit-making.

For teacher unions, one obvious route in the argument against vouchers is to confront head-on the ideological claims of voucher proponents as wholly unsubstantiated – as shown in Section 4. We might take this line of argument further by asking - in a social justice perspective - *who* actually benefits from voucher plans.

Milton Friedman (1955, see also West, 1997) asserted that his proposal for school vouchers "*center attention on the person rather than the institution*" – that is, to the benefit of parents and students rather than schools and government bureaucracy. School vouchers thus represent a call for individualised consumer-democracy, where parents and students are ostensibly 'set free' to vote with their feet. The watchword is 'freedom' or 'liberty'; with an individualist concept of 'freedom' standing for 'free from government', 'free to choose', 'free from others' (cf. school segregation), and - in the more radical varieties such as in Chile and Sweden - 'free to make business'.

On the basis of what we know from the research evidence, Friedman's juxtaposition of the individual and institution (i.e. government) is misleading. Proponents of school vouchers tend to neglect the fact that with the creation of quasi-markets in education, private providers and business entrepreneurs become part of a new institutional regime – operating according to a more market-based logic and with its own distinct shortcomings in terms of 'producer capture'. In Sweden, the school quasi-market has become increasingly important for the business sector; free-school companies have been relatively profitable, with low investment costs and risk levels, and several of the larger companies have expanded abroad. These features render edu-business attractive for private equity companies - some of them foreign - aiming to generate profits for shareholders in the short term (Lundahl, 2016; Lundahl et al. 2013). Has the shift towards voucher plans, and the associated rise of a new institutional regime benefited individual students and their parents? The evidence is clear here: No. It is on this basis, that Wiborg (2014) points out that the "*big winners from Sweden's for-profit 'free' schools are companies, not pupils*".

Likewise, Welner (2017) notes that neither conventional vouchers nor neo-vouchers are likely to help students. Indeed, the convoluted tax credit mechanism enabling neo-vouchers in the US involves subtle changes in decision-making regarding which non-profit school providers to fund, less equity, and an incremental undermining of public education. More precisely, the tax credit mechanism of neo-vouchers effectively transfers decision-making authority from lower-income parents to higher-income taxpayers – in the cases where the latter are eligible for vouchers - because wealthier families tend to be the ones who owe substantial state taxes, and they are more likely to choose non-public schools (Welner, 2008). This is exacerbated by a baffling loophole in six US states that give a full tax credit for voucher donations. In those states, wealthy taxpayers can get back the full value of their voucher *plus* a federal tax deduction for the donation (as a charitable contribution) – and they thus receive tax benefits exceeding the value of their donations (Welner, 2017).

It is a curious paradox in this respect that Friedman (1955) saw taxes as central to his

argument for school vouchers; he argued that parents choosing to send their children to private schools should not be required to pay twice for education - in the form of general taxes and once directly to a non-subsidised school. With tax credit neo-vouchers, we have come full circle in terms of how the already privileged can entrench their advantages through complex tax arrangements designed to further privilege them.

In the face of these very real complexities of education governance – with *politics* and *power* at its heart - Friedman's (1955) ideological claim that vouchers would set individual students and parents free from bureaucratic regulations and provide equal opportunities appears rather naïve. Rather, the institutionalisation of the market form in education tends to render governance more complicated and less transparent, not least for students and parents - and it contributes to deepen existing inequalities.

The empty promises of the school vouchers argument lead us to the conundrum of school choice, and how to achieve a balance in offering parents and students some scope of school choice while avoiding the harmful effects of a 'quasi-market' in education. The discussion of how to regulate school choice raises some tough questions for teacher unions; teachers should work hard for the benefit of all children, and they are on the side of all parents, including in their desire to ensure the best possible choice of school for their children. At the same time, it is clear that some parents and students are better positioned in terms of choice, and that 'quasi-markets' in education deepen the gap between those who can actually choose and those who cannot.

As a radical form of providing choice, school vouchers are inevitably connected with this discussion, related to the dynamics – and arguably - tradeoffs between commodification and social justice. Wolfgang Streeck (2010, pp.36-37) notes that societal contestation and conflict go beyond struggles over the distribution of the outcomes of joint production: "... *they are also about which spheres of life should legitimately be subject to commodification, and which should remain protected from the expansion of market relations*".

In the same respect, Streeck (2010) points out that efficiency-theoretical accounts of capitalism in our era of aggressive tax planning and financial sector and bank bailouts are not very convincing. Considering this argument in relation to education policy, the bottom line is that during the period where school vouchers, and school choice more generally, have been promoted, inequality has deepened in the most affected systems, such as those in Chile, Sweden and the US. The claim that vouchers and the provision of choice would ensure a more 'level playing field' for all students therefore rings rather hollow; rather than being part of the solution, it seems more likely that they are part of the inequality problem confronting the world today after 30 years in the making (OECD, 2008, 2011, 2015).

In trying to make sense of the 'deeper' impact of school vouchers and educational quasi-markets, we might see the debate and use of these policy instruments as related to the encroachment of 'market justice' on 'social justice'. Based on his meticulous analysis of the main political economies of democratic capitalism since World War II, Streeck conceives these two concepts as competing principles of distribution (Streeck, 2014, see Table

1). I would argue that they are helpful in capturing the ‘deeper’ implications of school vouchers, choice and privatisation. Two issues might be singled out in this respect: *Trust* and *parents’ endorsement of choice*.

	Market justice	Social justice
Defining features	<i>“distribution of the output of production according to the market evaluation of individual performance, expressed in relative prices; the yardstick for remuneration according to market justice is marginal productivity, the market value of the last unit of output under competitive conditions”</i>	<i>“determined by cultural norms and is based on status rather than contract; collective ideas of fairness, correctness and reciprocity, concedes demands for a minimum livelihood irrespective of economic performance or productivity, and recognises civil and human rights to such things as health, social security, participation in the life of the community, employment protection and trade union organization”</i>
Assumption	<i>Markets are sufficiently perfect; the outcomes can be considered just and efficient</i>	<i>Justice is socially constructed and subject to cultural and political discourse and historical change</i>
Notion of justice	<i>Justice is decided by the market and expressed in prices</i>	<i>Justice is decided in a political process, subject to power and influence, and is expressed in formal and informal institutions</i>
Rationality	<i>Formal rationality of the market</i>	<i>Material, substantive rationality</i>

Table 1. Market justice and social justice (Streeck, 2014, pp.58-59)

Concerning *trust*, market forms in education involve that justice is decided by the market, understood as being sufficiently perfect to produce just outcomes. Streeck (2014, p.61) argues that the main prerequisite for the functioning of a capitalist economy is the trust of capital – that is, employers – in the political conditions for adequate returns of their investments. It follows that the more commodified the education sector, the more asymmetrical it becomes in terms of power relations between capital and labour, because the demands and needs of the latter are deemed disruptive to the functioning of (ostensibly) efficient markets. In other words, according to the formal rationality of the market, there must be narrow limits to the correction of market justice by democratically empowered social justice – including the scope of action for teacher unions.

In this perspective, school voucher plans are likely to entail the undermining of social

justice by market justice – either through sweeping reform or incrementally. On this basis, we might ask whether the requirements of capital to have trust in market-friendly and essentially depoliticised political conditions are incongruent with the demands of teachers in terms of recognition of – and indeed trust in – their professionalism.

With regard to choice, Coote (1998) elegantly captured the limitations of the liberal individualist fixation in her argument that ‘empowerment’ through consumer choice is “*an individualistic concept which does good service in preparing public opinion for rolling back and marketizing the state, but fails to address the complex interdependence of citizens, both within and between families and communities*” (Coote, 1998, p.185).

Again, Streeck’s (2014) concepts are helpful in capturing the dynamics and potential tradeoff between market justice and social justice. Though each family choosing a school for their child might experience, feel and endorse some scope for choice, the fact is that the outcome of the aggregated choices tends to favour the more privileged at the expense of the less privileged (Fiel, 2015; Hsieh and Urquiola, 2006; Ladd, 2002; Levin, 1998; Lundahl et al. 2013; Valenzuela et al. 2014). In this respect, Fiel (2015) provides the interesting argument – supported by empirical research from the US – that school segregation increases with the level of decentralisation, constituting a mode of ‘monopolistic closure’, with racial/ethnic groups monopolising particular schools in their competition for school-based status and resources.

On the other hand, there is an important case to be made for school choice, in a democratic and ethical perspective, as something *good in itself*. And it has popular appeal (cf. the reference to Carnoy, 1998, in Section 2). For example, 59 percent of US citizens in a recent Gallup poll agreed with US President Trump’s proposal to provide federal funding for school-choice programmes allowing students to attend any private or public school (Gallup, 2017; see also Davies and Aurini, 2011, on parents’ endorsement of school choice in Canada). Moreover, it complicates the debate on school vouchers, and school choice more generally, that it is difficult to justify denying more choice to disadvantaged students and parents because at least *some* of them are likely to benefit from policies giving them access to schools that would otherwise be outside their reach (Ladd, 2002).

In disentangling the conundrum of school choice, it might be worth reminding ourselves that choice is a major tenet of *both* a market economy and a democratic society (Levin, 1991, p.137); choice indicates the freedom of a people, with the provision of more choice signalling a better society, and, conversely, the lack of choice is associated with unresponsive, overly centralised and perhaps authoritarian regimes. However, at the same time, Levin (1998, p.374) – focusing on the US – points out that “*the private benefits of vouchers are likely to be positive relative to the present system in terms of satisfying narrow consumer preferences, but ... the social consequences will be worse because of greater inequality and the further deterioration of a common educational experience as social goals of schooling are sacrificed to consumer sovereignty*”.

In fact, Levin here manages to put Coote’s argument on the limitations of consumer choice in public policy in the context of education, as well as capture the implications of



market justice encroaching on social justice in education sectors.

In summary, we might say that 'universal' voucher plans reflect the features and rationality of market justice, whilst means-tested targeted voucher programmes for disadvantaged families correspond with social justice – with the latter constituting an attempt to intervene in the existing education system for the objective of social justice. Yet, it must be emphasised that whilst the harnessing of such means-tested voucher programmes might provide a 'safety valve', they will never on their own address the fundamental challenges of inequality, school and housing segregation (Ladd, 2002). In other words, *"it is not so much the case that desegregation is a solution to the educational problems of the poor, but rather that segregation would hinder the solutions to those problems"* (Valenzuela et al. 2014, p.218).

The Action and Reactions of Teacher Unions to School Vouchers

This Discussion Paper has exposed the claims of school vouchers as what they are: Ideological claims which fail to deliver what they promise. Intertwined with efforts to promote privatisation and the market form in education, teacher unions should be concerned about initiatives that seek to promote school voucher plans wherever this takes place (see Sections 4 and 5).

At the same time, the Discussion Paper has highlighted the diversity of voucher plans, and pointed out that their institutional and social contexts must be considered in assessing likely impacts and formulating responses to them (see Section 3).

Finally, Section 5 discussed the dynamics and potential tradeoffs between 'market justice' and 'social justice' in terms of school choice, a discussion which raises some tough questions concerning how a more enlightened debate on the implications of school choice policies could be achieved. In this respect, Carnoy (2017, p.2) provides some pointers for where the debate could be taken:

"... giving every parent and student a great "choice" of educational offerings is better accomplished by supporting and strengthening neighborhood public schools with a menu of proven policies, from early childhood education to after-school and summer programs to improved teacher pre-service training to improved student health and nutrition programs. All of these yield much higher returns than the minor, if any, gains that have been estimated for voucher students."

On this basis, we can conclude that teacher unions are faced with the tasks of documenting voucher plans in existence, as well as *formulating responses* to such voucher plans. Both require the consideration of the particular political and social context, including the relevant population's *confidence* and *trust* in the public education system, and how this relates to trends of privatisation. Drawing on the insights of Carnoy (1998, 2017), Coote (1998), Levin (1991, 1998), and above all Streeck (2010, 2014), Box 1 attempts to summarise the questions, teacher unions might ask themselves and other education stakeholders in documenting, assessing and formulating responses to voucher plans.

- *What are the specific features of the voucher plan in question?*
- *Which social groups stand to gain and which stand to lose from school vouchers?*
- *Are school vouchers introduced in a context where there is strong public trust and political support for the public education system?*
- *Is privatisation (and profit-making) strongly promoted politically with sweeping allegations that the public system has failed?*
- *Where should the limits for school choice go?*
- *To what extent should market justice and the associated 'right to choose' override social justice?*
- *What can teacher unions do to show the downsides of consumer choice?*
- *How can teacher unions inspire a more informed debate about the broader impact of market-making in education – thereby going beyond educating parents and their children for individualised consumer-democracy?*

Box 1. Documenting, assessing and responding to voucher plans

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School vouchers and the privileges of choice

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July 2017



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Published by Education International - July 2017
ISBN 978-92-95109-34-6 (PDF)
No Paperback