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## **Education Markets and Schools' Mechanisms of Exclusion: The Case of Chile<sup>1</sup>**

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**Abstract:** Education market advocates frequently argue that socioeconomically disadvantaged students could be the main beneficiaries of privatization and market policies. However, the international evidence has shown how privatization and pro-market policies have a negative impact in terms of equity, which particularly affect socioeconomically disadvantaged

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populations, increase school segregation and stratification, and foster educational inequalities. The main objective of this paper is to analyze how the responses developed by educational providers in marketized environments especially impact poor populations and can act as mechanisms of exclusion. In this context, Chile is an optimal case study due to the extreme version of privatization and market policies it adopted four decades ago. Based on the case study of two municipalities in Chile, which represent two local education markets, the presented evidence combines in-depth interviews with school principals and families. The paper analyses how schools' responses in the context of a competitive environment produce, among other effects, processes of exclusion affecting students from low socioeconomic backgrounds, foster school segregation and increase educational inequalities. Finally, the paper elaborates on the limits of education markets and privatization policies, as well as market regulation reforms, in providing better educational opportunities to socioeconomically disadvantaged students.

**Keywords:** privatization; educational equity; Chile

### **Mercados educativos y dispositivos de exclusión de las escuelas: El caso de Chile**

**Resumen:** Los defensores del mercado educativo con frecuencia argumentan que los estudiantes socialmente más desfavorecidos podrían ser los principales beneficiarios de las políticas de privatización y de mercado. Sin embargo, la evidencia internacional ha demostrado cómo las políticas de privatización y pro-mercado tienen un impacto negativo en términos de equidad, el cual afecta especialmente a la población socioeconómicamente más desfavorecida, aumenta la segregación y la estratificación escolar, y fomentan las desigualdades educativas. El principal objetivo de este artículo es analizar cómo las respuestas desarrolladas por los proveedores educativos en entornos de mercado afectan especialmente a las poblaciones pobres y pueden actuar como mecanismos de exclusión. En este contexto, Chile es un óptimo caso de estudio debido a la versión extrema de privatización y políticas de mercado que adoptó hace cuatro décadas. Basado en los estudios de caso de dos municipios de Chile, que representan dos mercados educativos locales, la evidencia presentada combina entrevistas en profundidad con directores de escuelas y familias. El artículo analiza cómo las respuestas de las escuelas en un entorno competitivo producen, entre otros efectos, procesos de exclusión que afectan a estudiantes de bajo nivel socioeconómico, fomentan la segregación escolar y aumentan las desigualdades educativas. Finalmente, el documento reflexiona en torno a los límites de los mercados educativos y las políticas de privatización, así como las reformas de la regulación del mercado, para brindar mejores oportunidades educativas a los estudiantes socialmente más desfavorecidos.

**Palabras-clave:** privatización; equidad educativa; Chile

### **Mercados educativos e dispositivos de exclusão das escolas: O caso do Chile**

**Resumo:** Os defensores do mercado educacional frequentemente argumentam que os estudantes socialmente desfavorecidos podem ser os principais beneficiários das políticas de privatização e de mercado. No entanto, a evidência internacional tem mostrado como as políticas de privatização e pró-mercado têm um impacto negativo sobre o capital próprio, que afeta especialmente as populações socioeconomicamente desfavorecidas, aumentando a segregação e estratificação escolar, e promover as desigualdades educacionais. O principal objetivo deste artigo é analisar como as respostas desenvolvidas pelos provedores de educação nos ambientes de mercado afetam especialmente as populações pobres e podem atuar como mecanismos de exclusão. Nesse contexto, o Chile é um excelente estudo de caso

devido à versão extrema das políticas de privatização e de mercado que adotou há quatro décadas. Com base em estudos de caso de dois municípios no Chile, que representam dois mercados educacionais locais, as evidências apresentadas combinam entrevistas em profundidade com diretores de escolas e de famílias. O artigo analisa como respostas de escolas em um ambiente competitivo produzir, entre outros efeitos, processos de exclusão que afetam os estudantes de baixo nível socioeconômico, a segregação escolar incentivar e aumentar as desigualdades educacionais. Finalmente, o documento reflete sobre os limites dos mercados educacionais e das políticas de privatização, bem como as reformas de regulação do mercado, para proporcionar melhores oportunidades educacionais aos estudantes socialmente desfavorecidos.

**Palavras-chave:** privatização; equidade educacional; Chile

## Introduction

In the last three decades, many countries have experienced an increase in the involvement of private providers in basic education, as well as an important expansion of pro-market education policies (Rizvi, 2016). The data available show that private enrollment in primary and secondary education has grown dramatically over the last three decades, particularly in low- and middle-income countries (Verger, Fontdevila, & Zancajo, 2016a). At the same time, many national education systems have adopted pro-market policies in education, essentially promoting school choice and competition between schools (Musset, 2012; Waslander, Pater, & Weide, 2010). Despite other possible benefits regarding effectiveness and efficiency, education privatization and market policies advocates have frequently argued that poor students could be the main beneficiaries from the adoption of these reforms. In many cases, the equity argument is part of the discourses defending the involvement of private actors in education and the adoption of market mechanisms.

For education privatization and market advocates, traditional state education systems limit the capacity of poor students to access high-quality schools since their school choice options are restricted and schools do not have appropriate incentives to improve their educational quality, due to the lack competition between them. In this context, increasing the capacity of choice for students and families, promoting competition between schools and facilitating the capacity of private institutions to deliver educational services are presented as feasible policy solutions for improving the educational opportunities of socioeconomically disadvantaged students (Patrinos, Barrera-Osorio, & Guáqueta, 2009). However, the empirical evidence has shown that education privatization and market policies have a negative impact on equity and particularly affect poor students (Waslander et al., 2010). Market policies and the involvement of private actors in education provision seem to be related to socioeconomic school segregation and stratification phenomena (Alegre & Ferrer, 2010; Elacqua, 2012; Fiske & Ladd, 2001; OECD, 2012a; Reay, 2004; Valenzuela, Bellei, & de los Ríos, 2014). Therefore, there is an apparent paradox between the ontology of privatization and pro-market policies regarding equity and their effects, according to the available evidence. The context in which these policies are implemented and the way in which educational actors enact market mechanisms can shed some light on this paradox.

Beyond the impact evaluations that identify the negative effects in terms of equity, particularly for socioeconomically disadvantaged students, the research needs to explore why and how marketization and privatization policies produce processes of segregation, exclusion or marginalization. Much of the research on the dynamics of education markets has focused on the demand side. In this sense, research concerning different contexts and on different policy designs

has shown that families and students do not enact market policies, mainly in the form of school choice, in the same way. Different studies have demonstrated how school choice processes are highly influenced by social class (Ball, 2003; Gewirtz, Ball, & Bowe, 1995). For example, middle- and upper-class families tend to manage high levels information, while lower-class families are faced with more economic restrictions and geographical and cultural barriers. As a result, the patterns of school choice are socially segmented, which partly explains the different results of privatization and market policies among advantaged and disadvantaged social groups. That said, how the incentives that schools face and the behaviors that they develop to respond to the competitive environment contribute to the exclusion of poor students has been relatively under-analyzed in the academic literature (Waslander et al., 2010). Beyond school student selection practices developed in some market contexts, responses in other dimensions, such as school diversification or external communication, have been identified as possible means to exclude most disadvantaged students. On the other hand, compared to the research carried out for the demand-side of the market, schools' rationalities, motivations, logics of action and mechanisms are still under-researched areas, particularly in relation to their capacity to generate educational exclusion.

This paper contributes to the analysis of how, through which mechanisms and under what motivations and rationalities, schools exposed to marketized environments can contribute to an increase in educational inequalities. This is essential in order to be able to accurately assess the capacity of regulation and compensatory policies to reduce the socioeconomic stratification among schools. This objective entails the identification of the main responses developed by schools in the process of education market enactment and the analysis of how these responses might exclude the most socioeconomically disadvantaged students. Based on the vast evidence on the Chilean education system, which demonstrates the negative impact of the education market on inequalities, this article seeks to open the 'black box' by identifying which supply-side mechanisms can explain these negative effects. The Chilean case is particularly interesting since in 2015 the government passed a legal reform, under the name Inclusion Law<sup>2</sup> which, among other issues, prohibits the most relevant and explicit practices producing social exclusion such as cost-sharing and students selection. Although it is still early to assess the impact of this legal reform, it is important to note that during the political debate, this law faced important resistance from right-wing political parties but also from private subsidized schools and families (Bellei, 2016). This resistance demonstrates the extent to which exclusion practices are rooted in the dynamics of the Chilean education system on both the supply and demand sides, and makes Chile a standout case to analyze the role of the supply-side when it comes to exclusion mechanisms.

The article is structured as follows. The first section reviews the main assumptions and the theory of change in privatization and market policies with a particular focus on the expected effects on equity and poor students. Second, some of the main characteristics of the Chilean case are presented, as well as evidence of school segregation and educational inequalities. Third, the research methodology and the data collection process are briefly explained. Fourth, the main findings of the research are summarized, highlighting how different schools' responses to the education market can act as mechanisms of exclusion and increase school segregation and educational inequalities. Finally, the main conclusions of the research are presented and the capacity of privatization and market policies to provide educational opportunities to poor students is discussed in light of the results obtained in the Chilean case.

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<sup>2</sup> Ley de Inclusión Escolar (20.845) in Spanish.

## **Education Markets and Equity: Between Theory and Evidence**

Education privatization and market-oriented reforms are adopted under different circumstances and rationalities. The supposed superiority of the private sector, the 'public education in crisis' narrative, the need for school supply diversification and economic efficiency arguments are commonly used to promote and justify the adoption of privatization and market reforms (Verger et al., 2016a). However, market reforms in education have also frequently been adopted and justified as a way to improve the educational opportunities of the poor and minority groups (e.g., immigrants, black students or linguistic and religious minorities; Lubienski, 2005; Lubienski, Weitzel, & Lubienski, 2009). In some contexts, the main pressures for the adoption of school choice and privatization policies even come from the most socioeconomically disadvantaged populations or minorities, who see, in market solutions and private schools, a means to expand their educational opportunities or meet their specific educational needs (Harris, Herrington, & Albee, 2007; Walford, 2013). However, critics of pro-market reforms have warned that these policies may not improve the situation of poor students, but rather amplify the existing level of inequalities (Apple, 2001; Belfield & Levin, 2009; Ladd, 2002).

Although privatization and market mechanisms are not new ideas in education, they have been disseminated across the globe in the last two decades, particularly by International Organizations, non-state international actors and national development aid agencies. As Rizvi (2016) points out, globalization has contributed to the rapid expansion of these policies worldwide and particularly in middle- and low-income countries. Usually these policies are presented as a feasible solution for southern countries trying to expand access or to improve the quality of primary and secondary education. In some cases, this is an attempt to achieve the objectives of the past Education for All (EFA) framework, or of the current education Sustainable Development Goals (SDGs; Srivastava, 2010). In this case, the capacity of these policies not just to provide access and improve quality but also to increase equity, particularly regarding the incorporation of traditionally marginalized populations to the education system, is a frequent argument used by International Organizations. For example, the 2020 World Bank Education Strategy establishes equity improvement as one of the main objectives and at the same time considers partnerships with the private sector as one desirable policy option to achieve this objective (Verger & Bonal, 2011; World Bank, 2011). Beyond the involvement of the private sector, pro-market policies in education, such as school choice and competition, have been also broadly disseminated on a global level by IOs and other international actors. Nowadays, it is possible to affirm that market solutions are part of the global education agenda (Ball, 2012; Ball & Youdell, 2008). However, the global expansion of privatization and market mechanisms in education has been related to the increase of inequalities in southern countries and in particular to the exclusion and marginalization of most socioeconomically disadvantaged populations. For example, Macpherson, Robertson, and Walford (2014) analyze different case studies of education privatization in southern countries showing, among other concerns, that in many cases the advance of this phenomenon does not necessarily increase the opportunities of most socioeconomically disadvantaged students but has in fact generated processes of exclusion and marginalization of these populations. Similar results regarding equity are shown by Ndimande and Lubienski (2017), in this case particularly focusing on the effects of the adoption of market mechanisms in education and combing case studies from northern and southern countries. Ndimande and Lubienski (2017) consider that market mechanisms and privatization do not necessarily improve the educational opportunities of marginalized children in the countries analyzed and also can perpetuate and increase educational inequalities.

Although equity-based arguments are frequently used by privatization advocates, it is not easy to identify a clear theory of change in terms of how these policies could improve the educational opportunities of socioeconomically disadvantaged students. In fact, privatization and market initiatives are typically justified as a way to overcome the supposed failures of state intervention or ‘democratic control’ in education, rather than by emphasizing the inherent benefits of these interventions. This line of argument is also applied to the case of equity. For example, Tooley (1996) defends the equality capacity of education pro-market solutions as alternatives to the inequalities created by state intervention, which, for the author, are “an inevitable consequence of the middle-classes ‘muscling in’ on welfare, using the state to provide for their needs, at the expense of the poor” (Tooley, 1996, p. 63). In the same sense, the seminal pro-market education proposal, *Politics, Markets, and America’s Schools* (Chubb & Moe, 1990), is also based on the need to overcome the supposed intrinsic pathologies of state education systems, especially their incapacity to provide educational opportunities to socioeconomically disadvantaged students, who are normally concentrated in underperforming schools (Neal, 2002).

Although there is no specific equity focus on the proposals of education “market theory” (Lubienski, 2006a), the review of the main assumptions behind the adoption of privatization and market policies in education permits us to identify how the proponents of these policies forecast that poor populations could benefit from the application of its principles. In this regard, there are two main sets of arguments: one related to the demand side and the other to the supply side. Regarding the demand side, for education market proponents, increasing families’ choice options, through school choice policies and vouchers schemes, is a way to provide them with real capacity to exercise “exit” (Hirschman, 1970), i.e., leaving underperforming or low-quality schools, and accessing schools previously restricted to them, because of economic barriers or the presence of more restrictive catchment areas (Hoxby, 2003). In this respect, Moe (2008) affirms that the increase in school choice capacity particularly benefits the poor, who, unlike middle- and upper-class families, do not have other options to increase the educational opportunities available to their children.

In practice, this means that parents with money can escape the trap by changing their residence or going private, but poor parents cannot. Thus, a major advantage of choice is that it expands the opportunities of parents who are in greatest need and who currently have little or no control over their children’s educations. (Moe, 2008, p. 565)

As the above quote suggests, the main objective regarding equity among market proponents is not to establish compensatory measures or provide additional options to students from low socioeconomic backgrounds, but to ‘level the playing field’ by reducing the barriers facing these students trying to access better schools (Musset, 2012). In fact, for Moe (2002), providing equal opportunities for poor and non-poor students through initiatives such as vouchers and school choice “will tilt the playing field in favor of the disadvantaged and aggressively promote the cause of social equity” (Moe, 2002, p. 180). Within this framework, it is assumed that families and students, regardless of their socioeconomic status (SES), will manage the necessary information for choosing better-quality schools and act in line with instrumental rationality, based on educational quality, when it comes to choosing a school for their children. Those who are skeptical about these assumptions argue that families do not have access to the same information (Elacqua & Fábrega, 2006); that families from different social backgrounds do not have the same skills to interpret and analyze this information (Ambler, 1994; Gewirtz et al., 1995); that school choice is not always guided by instrumental rationality (Ben-Porath, 2009; Bonal, Verger, & Zancajo, 2017); or that families’ school preferences are socially influenced (Ball, 2003; Schneide, Teske, & Marschall, 2000).

Another set of arguments used by pro-market advocates to defend the equity benefits of education markets refers to the supply side of the market. It is claimed that the adoption of policies, such as school choice and per capita funding schemes (i.e., vouchers), will force schools to operate according to the rules of competition (Belfield & Levin, 2002). It is precisely this competitive environment that will provide the necessary incentives to schools to deliver a quality education for all, or conversely force them to exit the market due to a lack of demand and financial resources. This environment of competition should provide schools with “strong incentives to move toward the kinds of ‘effective-school’ organizations” (Chubb & Moe, 1990, p. 190). In other words, in an education system coordinated by state intervention and not by market, low-quality schools are only able to operate because of a lack of competitive incentives. However, competition, based mainly on per capita funding, provides schools with the necessary motivation to improve the quality of their education; otherwise, being unable to attract students, they are forced to exit the market.

However, different scholars have pointed out that schools do not necessarily respond to market incentives as education market theory expects. Two main approaches have been useful in understanding why schools in a competitive environment do not develop the expected responses and therefore fail to improve the educational opportunities of socioeconomically disadvantaged students or even increase educational inequalities. First, there is the fact that schools in competitive environments do not necessarily perceive competition in the same way and therefore do not develop the expected responses, for example, in terms of improving the quality of education. In this context, it is important to distinguish between structural competition and perceived competition. While structural competition refers to the existence of alternative options in the market, perceived competition entails the extent to which and how schools perceive these alternative options as direct competitors (Jabbar, 2015; Kasman & Loeb, 2013). Frequently, the adoption of market mechanisms does not necessarily translate into a high perception of competition (Zimmer & Buddin, 2009). In fact, in market environments schools’ perceived competition is often lower than structural competition, with some schools even able to develop responses to avoid competition (Leviacic, 2004). Consequently, the adoption of market policies seems to be an insufficient condition for providing the necessary incentives to schools in order to significantly alter their pedagogical and management practices.

The second approach, which tries to explain why schools do not always respond to market policies as the theory expects, is based on the economic theory of monopolistic competition (Lubienski, 2006b). Monopolistic competition (Chamberlin, 1933; Robinson, 1933) refers to a situation where providers are not able to compete using price and therefore need to differentiate their products through other features. In the case of education, and particularly basic education, the capacity to offer a substantially different product to that of other providers in the educational market is relatively limited. In most education systems, regardless of the presence of market policies, the curriculum of basic education is strongly regulated by the state, which means the capacity of schools to develop substantive changes in curricular terms is limited. In the context of the education market where: a) the exchanged good is relatively homogeneous, b) the margin of action with respect to price is limited, and c) there is a large number of suppliers, frequently resulting in attempts by schools to differentiate themselves through attributes of symbolic nature. These are not necessarily transferred to the daily activity of schools and marketing practices are especially important when emphasizing these symbolic aspects, which do not necessarily have an impact in terms of the quality of education (Lubienski, 2006b).

Despite the fact that the demand side of the market (students and families) and particularly socioeconomically disadvantaged populations do not necessarily respond as market advocates expect, the incentives that schools offer do not necessarily translate into gains in terms of equity. As

Lubienski (2006a) states, “market forces may in fact provide disincentives for schools to focus on the equity considerations of diverse learning styles and difficult-to-educate students” (p. 25). In this sense, socioeconomically disadvantaged students are especially affected by what van Zanten (2009) refers to as first- and second-order competition. While first-order competition involves incentives that schools offer to attract a large number of students, second-order competition takes place when schools try to attract the most academically able students, since they cost less to educate.

### **The Case of Chile: Privatization, Marketization and Inequalities**

Historically, Chile has been well known as one of the most market-oriented education systems in the world (Bellei & Vanni, 2015). Since the reforms adopted during the 1980s, in the context of the military dictatorship led by Augusto Pinochet, the Chilean education system has been characterized by the presence of a universal voucher scheme, total freedom of school choice and high levels of school competition (Cox, 2003; Gauri, 1998; Mizala, 2007). The most direct and visible effects of the reforms adopted during the 1980s have been the emergence of private subsidized schools and an increase in enrollment in private institutions. Private enrollment has risen dramatically, from 15.1% in 1981 to 61.2% in 2017 (Centro de Estudios Mineduc, 2017; Verger, Bonal, & Zancajo, 2016b). Nowadays, around 90% of students in primary and secondary education are enrolled in schools funded through the voucher system (Paredes & Ugarte, 2011). On the other hand, private schools are allowed to operate on a for-profit basis and, since the mid-1990s, private subsidized schools have been allowed to charge families mandatory fees (Elacqua, Montt, & Santos, 2013)<sup>3</sup>. The Chilean education system has also developed a strong information system, which is mainly based on the national performance assessment (SIMCE). This information system accomplishes two main roles: it provides information to families regarding school choice processes and it informs accountability devices (Bravo, 2011; Falabella, 2015). Finally, another important feature of the Chilean case is that market rules in education have remained relatively stable for more than 30 years, which means that both demand (i.e., families and students) and supply (i.e., schools) sides are familiar with and able to operate in a market environment.

From a global perspective, the Chilean case plays a relevant role because it represents the most extreme version of an education market or an ‘authentic’ market (Tooley, 1996). Since the adoption of the market education reform in the 1980s, Chile has been traditionally considered by market advocates as an example to follow of a country adopting a universal voucher scheme and promoting school competition. However, since 2006, with the massive student and civil society mobilizations against the high level of educational inequalities, Chile has become a case that exemplifies the unintended consequences of privatization and pro-market policies in education, especially in terms of equity.

After more than three decades of market policies in education, there is a relative academic consensus that the reforms adopted to promote the involvement of private providers in the provision of education, competition between schools and significant levels of school choice have produced little or null effects in terms of academic performance or educational quality (see Bellei [2007] for a review of the existing studies). Nevertheless, some authors point out that the

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<sup>3</sup> Recently, the Chilean government approved an important educational reform that prohibits student selection, eliminates school fees in publicly funded schools and does not allow schools to operate on a for-profit basis (Bellei, 2016). Regarding the contents of this research, the fieldwork and the collection data were developed before the approval of the reform.



compensatory policies developed during the 1990s<sup>4</sup> have improved the results of schools with the lowest academic performance (e.g., rural schools and public schools situated in poor contexts; Bellei, 2003; Cox, 2003). However, the Chilean education system is characterized by high levels of school segregation and educational inequalities. In fact, international comparisons show that Chile has the lowest level of school social inclusion<sup>5</sup> and one of the highest levels of school segregation among OECD countries (OECD, 2016; Valenzuela, 2008). This progressive process of school socioeconomic stratification can be mainly explained as a consequence of a process of concentrating most socioeconomically disadvantaged students in public schools, which followed the middle-class flight to private schools in recent decades (Elacqua, 2012; Villalobos & Valenzuela, 2012).

Beyond the ethical or social justice concerns about the unequal distribution of students, school segregation has also fostered a “socioeconomic stratification of achievement” (Mizala & Torche, 2012), increasing the differences in academic performance between private and public schools and between different SES groups of students (Mizala & Romaguera, 2000). That said, how the school segregation of socioeconomically disadvantaged students works in Chile is a complex phenomenon. While students with a low SES are mainly enrolled in public schools, their level of segregation is greater in the private subsidized sector (Elacqua, 2012). On the other hand, this relationship between privatization and market reforms and inequalities goes beyond the academic performance of students. Torche (2005) examines how educational opportunities, related to the possible attainment of a specific educational level, have evolved in recent decades, which demonstrates how inequalities have increased among the age cohorts directly affected by the privatization reforms adopted during the 1980s. While there is no direct impact evaluation of the 1980s reforms on equity issues, such as school segregation and stratification, the available evidence seems to point to a negative relationship between privatization reforms and inequalities (OECD, 2004). The relationship between market policies and school segregation transcends the national scale, for example, Valenzuela et al. (2014) observe that higher levels of privatization and marketization at the local level are related to higher levels of school segregation at the municipal level. As Bellei, Contreras, Cananles, & Orellana (2018) explain, market policies are not necessarily the origin of school segregation in Chile, but enough evidence exists to confirm that they have amplified the unequal socioeconomic distribution of students in schools.

Research on the mechanisms that explain school segregation in the Chilean education system identifies both demand- and supply-side dynamics. Regarding the demand side of the market, studies show that school choice processes are significantly affected by social class and economic barriers. Student selection practices, school fees and even geographical barriers are important restrictions, which mainly affect poor families when it comes to choosing a school for their children (Alves et al., 2015; Raczynski, Salinas, de la Fuente, Hernández, & Pascual, 2010; Rodríguez et al., 2016). On the other hand, research has also identified how upper- and middle-class families have access to different sources of information from low SES families (Elacqua & Fábrega, 2006). There are also important differences in terms of school choice preferences and choice criteria between middle and low SES families (Elacqua, Schneider, & Buckley, 2006).

On the other hand, school competition has also been identified as driver of school segregation in the Chilean context for two main reasons. First, the adoption of a universal voucher

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<sup>4</sup> Since the restoration of democracy (1990), the Chilean government has put in place different compensatory programs to improve the resources and the learning conditions of the worst schools. See Cox (2003) for a comprehensive review of these programs.

<sup>5</sup> The PISA index of social inclusion measures the level of socioeconomic heterogeneity in schools, with low values indicating fewer levels of social heterogeneity (OECD, 2013).

system and school choice have produced an important transfer of students from public to private subsidized schools, mainly from middle-income families, increasing the concentration of poor students in the public sector (Carnoy, 1998). Second, some schools have responded to competition incentives by selecting the best students and increasing the level of stratification between public and private schools (Contreras, Bustos, & Sepúlveda, 2010; Hsieh & Urquiola, 2006). For Bellei (2007), the main hypothesis by which to explain this behavior is that, within the market framework, “schools can improve their market position without improving the quality of their educational service” (Bellei, 2007p. 28). This hypothesis is based on the fact that schools can improve their academic performance without increasing the quality of the education service by recruiting the most academically able students. At the same time, the school population can act as an attraction to potential demand, since some parents do not necessarily base their choice on academic quality but on other attributes of a symbolic nature.

Finally, it is important to take into account which role segregation plays in the Chilean education system from a more cultural point of view that, at least partially, can explain the extensive use of these practices among schools. In this sense, Falabella, Seppänen, & Raczynski (2015) point out how in Chile students’ selection practices enjoy higher levels of tolerance than in other countries. For the authors, this higher level of tolerance is rooted in a strong meritocratic belief in which selection practices are seen as a way to reward those children who deserve to be enrolled in higher status schools. The other factor, of a more material nature, highlighted by the authors to explain this tolerance is the need for social distinction in a highly socioeconomically stratified education system. The social composition of the school is a key factor for parents to guarantee the future educational and social success of their children. Hence, students’ selection is understood as a necessary practice to ensure that children with similar socioeconomic status are enrolled in the same school. Precisely, this greater tolerance for social injustice explains why in Chile families and schools are socially allowed to develop practices and strategies that foster and reinforce school social stratification. It is necessary to take into account this cultural dimension of school segregation when it comes to analyzing the mechanisms and logics of action developed by schools to produce social exclusion.

In Chile, there is a large body of literature analyzing the impact of school choice and competition on areas such as effectiveness and equity. However, research on actors’ logics of action and mechanisms that explain these impacts is still relatively scarce. Moreover, the differences in preferences and patterns of school choice between low SES students and other social groups, which have been well documented (Bonal et al., 2017; Canales, Bellei, & Orellana, 2016; Carrasco, Falabella, & Mendóza, 2015), as well as how schools respond to competition, are essential factors in understanding the mechanisms of social exclusion that particularly affect the poorest students. In fact, the available evidence indicates that, in Chile, as in other contexts, pro-market policies drastically influence the practices developed by schools (Carrasco & Fromm, 2016; Verger et al., 2016b).

## **Data and Methods**

The findings presented in this article are based on case studies developed in two municipalities of Chile. Both are urban municipalities with between 300,000 and 350,000 inhabitants. Due to the importance of the local dimension when analyzing the dynamics of education markets (Gewirtz et al., 1995; Lubienski, 2007; Woods, Bagley, & Glatter, 1998), both municipalities were selected as they represent relatively closed local education markets (LEMs). Despite school choice boundaries not existing in Chile, data from the CASEN-2013 Chilean household survey showed that the number of primary education students enrolled in schools in both municipalities who actually live

in the municipality is high in both cases (94.8% in Municipality A and 86.9% in Municipality B). At the same time, the percentage of the population living in both municipalities but attending school in a different municipality is relatively low (7% in Municipality A and 9.3% in Municipality B). In both cases, the diversity of education providers in terms of ownership was relatively high in both municipalities. In Municipality A, the percentage of schools and enrollment by type of school is relatively similar to the national average, with 36.3% of students enrolled in public schools, 57.7% in private subsidized schools and 6% in private independent schools. In the case of Municipality B, the level of enrollment in public schools is relatively low (18.7%) in comparison with the national average (40.4%), which translates into an increase in the proportion of the private subsidized sector (74.1%).

The fieldwork was developed in different phases between May 2014 and November 2015. A representative sample of schools was selected in each municipality based on three main attributes: typology (public, private subsidized, private independent), level of school fee, performance in the national assessment (see Appendix, table A-1, for the main characteristics included in the sample). Finally, 17 schools were selected in Municipality A, while the sample of schools in Municipality B consisted of 14 schools. In-depth interviews with school principals (lasting around 1.5 hours) and short interviews with families (between 20 and 30 minutes) were carried out. Table 1 summarizes the number of interviews with principals and parents by school typology in each municipality. Qualitative data have been complemented with a statistical analysis of the SIMCE parents survey<sup>6</sup> of all the schools included in the sample.

Table 1

*Principals' and parents' interviews by school typology and municipality*

Municipality	Interviews	Typology of school			Total
		Public	Private subsidized	Private	
Municipality A	Principals	6	9	2	17
	Parents	16	37	17	70
Municipality B	Principals	3	9	2	14
	Parents	5	27	7	39

The analysis of the collected qualitative data consisted of transcribing and coding the interviews with school principals and parents on different categories of school responses (e.g., contextual factors, pedagogical diversification, selection practices, academic performance, external communication). Due to the focus of this article being on school responses, the main source of information during the process of analysis was the interviews with school principals, while parents' interviews were used to triangulate the analysis. Since schools are the main unit of analysis, they were classified according to the SES of their students. However, the socioeconomic classification of schools also considered the local context. For each school, the average SES of students was estimated, and schools were classified into five categories (low, lower-middle, middle, upper-middle

<sup>6</sup> The national quality assessment (abbreviated as SIMCE in Spanish) is an external performance test administered annually among different grades. In this research, the fourth-grade assessment was analyzed, which also included a survey of parents about their socioeconomic characteristics, as well as the relationship with the school.

and upper) depending on the distance, in terms of standard deviations, to the local students' SES average.

### **Schools' Responses to the Education Market and Exclusion**

As in other contexts (Fiske & Ladd, 2001; Jabbar, 2015; Woods et al., 1998), the analysis of the two case studies shows that schools develop responses in six main dimensions: market scanning, establishment of school fees, school diversification, student selection, marketing, and academic performance improvement (mainly through teaching to the test practices). The focus of this section is to analyze how some of these responses can produce processes by which socioeconomically disadvantaged students are excluded. School fees and schools' student selection practices are among the main forms of exclusion identified by previous literature. However, the analysis carried out in the current study highlights that schools' means of excluding socioeconomically disadvantaged students are diverse and not always related to explicit and direct mechanisms. Frequently, semiotics plays an important role in preventing low SES students from enrolling at a particular school. In this respect, schools' behaviors in terms of diversification or marketing can become important mechanisms of exclusion.

From the school responses collected during the course of this research, it is possible to identify two main categories of mechanisms through which schools are able to influence and determine their school population, so as to exclude specific profiles of students or families and attracting others. On the one hand, there are hard mechanisms of exclusion, which refer to conditions of access imposed by schools and directly affect the capacity of low SES students to enroll. In the Chilean education system, hard mechanisms of exclusion involve the level of mandatory school fees charged to families and the explicit processes of student selection, such as entrance examinations. On the other hand, soft mechanisms are more related to semiotics (e.g., symbols, values, codes) and also prevent low SES students from applying to a particular school. In contrast, soft mechanisms involve the values and codes disseminated through school diversification or external communication. Through soft mechanisms of exclusion, schools seek to appeal to middle- and upper-class family codes, values and preferences. Since low SES families and middle- and upper-class families report very different choice preferences, a focus on meeting the preferences of the most socioeconomically advantaged families can exclude poor families in an indirect way. However, soft mechanisms of exclusion are not necessarily the result of conscious strategies developed by the schools, but rather the result of their logics of action in a market environment (Ball & Maroy, 2009; van Zanten, 2009). This section analyses in depth, how both hard and soft mechanisms of social exclusion operate and under what rationalities schools develop them.

#### **School Fees: Segmenting the Market**

One of the main hard mechanisms producing social exclusion in the context of the Chilean education market is the capacity of schools to impose mandatory school fees on families (Elacqua et al., 2013). In fact, Chile is a singular case since public and private subsidized schools received the same amount of public funding but schools are allowed to charge fees to families (Boeskens, 2016). In primary education, only private subsidized schools are allowed to charge fees, which is combined with a progressive reduction in public funding if the fees are more than the 50% of the total amount of the public funds received (Kutscher, 2014). Although public secondary schools are legally allowed to charge families mandatory fees, only a few of them do so. Different studies have shown how fees reinforce schools' social stratification dynamics, since poor families cannot afford the high level of fees of some schools (Raczynski et al., 2010). The possibility to charge mandatory school fees was approved in Chile in the mid-1990s, based on the argument that it would give families the capacity to

financially contribute to the education of their children and increase the level of financial resources available to the education system (Beyer, 2015). However, there exists a certain level of contradiction between the use of vouchers, as a way to facilitate access for all students to private schools, and the use of school fees, which act as a restriction, particularly for low-income families (Epple, Romano, & Urquiola, 2015).

In the case of the private subsidized schools analyzed, seven out of nine schools in Municipality A and six out of nine in Municipality B charged their students mandatory fees. As expected, data for the two analyzed LEMs show that there is a significant relationship between the level of school fees and the average SES of the school population. Table 2 presents the distribution of schools by the average SES of their students and the level of school fees. It is possible to observe in the graphic that, as the average SES of the school population increases, the higher the percentage of schools charge fees, as well as the higher the amount of these fees.

Table 2

*School fees level by school students' SES average (%).*

		School fees (Chilean pesos)					Total
		Free	1.000 to 10.000	10.001 to 25.000	25.001 to 50.000	50.001 to 100.000	
<b>Municipality A</b>	<b>School SES average</b>						
	<b>Low</b>	100	0	0	0	0	100
	<b>Medium-low</b>	69.1	9.1	20	1.8	0	100
	<b>Medium</b>	4.2	0	25	54.2	16.6	100
	<b>Medium-high</b>	0	0	11.1	44.5	44.4	100
	<b>High</b>	0	0	0	28.6	71.4	100
<b>Municipality B</b>	<b>Low</b>	83.3	16.7	0	0	0	100
	<b>Medium-low</b>	32.6	6.5	41.3	17.4	2.2	100
	<b>Medium</b>	0	0	9.4	62.5	28.1	100
	<b>Medium-high</b>	0	0	0	10	70	100
	<b>High</b>	0	0	0	0	0	100

Source: Own elaboration based on Mineduc statistics. Although it fluctuates frequently, the rate of exchange between US dollars and Chilean pesos (CLP) is approximately \$1 USD=\$724.5 CLP. Regarding the intervals of school fees presented in the table, this means: 1000-10,000 CLP=1.38-13.8 USD; 10,001-25,000 CLP=1.38-34.5 USD; 25,001-50,000 CLP=34.5-69 USD; 50,001-100,000 CLP=69-138 USD; More than 100,000 CLP= More than 138 USD.

Although school principals do not directly recognize the use of school fees as a way to exclude students<sup>7</sup>, they are aware of how it determines the socioeconomic profile of families that the school is able to attract and how it influences the socioeconomic background of their school population. For example, when school principals are asked about whom are their most direct competitors in the LEM, in the first place, they frequently refer to schools with the same level of school fees and sometimes how this is related to the academic profile of their school populations. In this sense, school fees are the main driver of education market segmentation on both the supply and

<sup>7</sup> Unfortunately, the majority of school principals interviewed confirmed that the level of school fees was set several years ago before they were in charge at the school.

the demand sides. It is openly assumed by principals and families that schools' fees levels are related to their students' socioeconomic background. Interviews with families revealed that school fees are the main attribute that is considered when establishing their set of choices. Although some families were interested in schools that charged fees, they quickly discounted them because "they were too expensive, and I can't afford them" (Mother, private subsidized, Medium-low SES, Municipality B). This relationship between school fees, market segmentation and their targeted population is frequently reported by school principals. The next quote from a school principal shows how schools are aware of the capacity of school fees to define the potential population of families and students, as well as position their schools in the LEM.

I believe that the population [that the school attracts] is of an average level because, in spite of being a private independent school, there are other private independent schools that are much more expensive. So, it is at a level that is a little higher than the private subsidized schools because the subsidized private sector can charge up to 75,000 pesos, more or less, and here we charge 120-130,000. But there are others that are worth 250,000. It's another level of income. (Principal, private independent school, Medium-high SES, Municipality A)

Although, as explained above, there is no explicitly recognized strategy regarding school fees, when school principals, who have recently established mandatory fees, were asked about the criterion to establish them, they referred to their ability to retain families and attract new demand. For example, one of the analyzed private subsidized schools, which enrolls low- and lower-middle-class families, recently established cost sharing (previously it was free). This measure is justified by the school principal as a way to attract additional financial resources and improve their capacity to compete with other nearby schools that historically have charged fees to families. When asked about the criterion to establish the fee level, the school principal only referred to the capacity to retain the current profile of families.

Interviewer: What criteria did you use to establish the monthly payment?

Principal: What can be paid. It can be waived in part, which means you can have an additional resource without meaning to strain families and let them go because they cannot pay. (Principal, private subsidized school, Medium SES, Municipality A)

In 2008, the Chilean government approved a compensatory policy, which tried, among other aims, to reduce the effect of school fees as a barrier imposed on the most socioeconomically disadvantaged students. The Preferential School Subsidy<sup>8</sup> (PSS) was a voluntary program for private subsidized schools by providing additional public funding for each socioeconomically disadvantaged student who enrolled. In turn, counterpart schools were not able to charge fees to these students, as well as being required to meet some accountability criteria. The available evidence on the impact of this policy on school segregation shows that it had no significant effect<sup>9</sup> (Raczynski, Muñoz, Weinstein, & Pascual, 2013; Valenzuela, Villaroel, & Villalobos, 2013). As Elacqua & Santos (2013) demonstrate, the increase in resources as a result of enrolling low SES students is not enough of an

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<sup>8</sup> Known in Spanish as Subvención Escolar Preferencial (abbreviated to SEP).

<sup>9</sup> However, the evidence also shows that this policy has been, on average, successful in increasing the academic performance of schools that enroll the most disadvantaged students and reducing the gap between public and private subsidized schools (Centro de Estudios Mineduc, 2012; Mizala & Torche, 2013).

incentive for schools and does not outweigh the advantages of enrolling the most socioeconomically advantaged school population. In some cases, principals from schools attended by low SES students (mainly public, but also some private subsidized schools) even consider that PSS could have fostered the dynamics of school segregation. According to these principals, some private subsidized schools participating in the PSS program have tried to attract low SES students with good academic records, increasing the concentration of poor and less academically able students in public schools. This phenomenon is explained by the next principal as part of his personal experience since the PSS program was established.

The private subsidized schools, which guide themselves by the issue of priority students, look for children with good [academic] performance and try to motivate them so that they will enroll in their schools, particularly those that have good performance (Principal, public school, Low SES, Municipality B)

In this sense, school fees are not just an economic barrier for poor students to access some schools, but also a means by which schools influence their school population, in turn segmenting the LEM.

### **Students Selection: Producing Exclusion and Auto-exclusion**

The second hard mechanism of exclusion identified is the use of students' selection processes. Although student selection, based on academic performance or socioeconomic background, has been formally prohibited in schools receiving public funding (public and private subsidized) since 2009<sup>10</sup>, it has been a common practice in Chile in recent decades. Research focused on this issue has revealed how selection practices are used by a significant percentage of schools, particularly private subsidized schools (Carrasco, Bogolasky, Flores, Gutiérrez, & San Martín, 2014; Contreras et al., 2010). In line with the existing evidence, this current study has also identified that student selection practices in the analyzed schools are among the most important mechanisms of exclusion. However, the collected evidence confirms that student selection is a complex practice in terms of use, nature, objectives and the degree to which it is carried out.

Although some of the school principals interviewed recognized that the use of explicit processes of selection was relatively common (19 of 39 schools recognizes the use of student selection practices), the SIMCE parent survey allows us to complement the information obtained via interviews of school principals and to quantify the extent of these practices. Graphic 1 shows the percentage of schools analyzed in each municipality, in which at least 50% of parents confirm that their children have been required to sit entrance examinations or that student behavior in the classroom has been observed according to the average SES of schools. As the data contained in the graphic show, there is a positive relationship between the use of these explicit procedures of selection and the SES of the school population. While the majority of upper SES schools use these practices (85.7% in Municipality A and 100% in Municipality B), schools with the lowest SES average do not use any of these procedures.

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<sup>10</sup> In 2009, the General Education Law (abbreviated to LGE in Spanish) prohibits the use of selection based on the current or potential academic performance of students, as well as their socioeconomic background, in primary education.

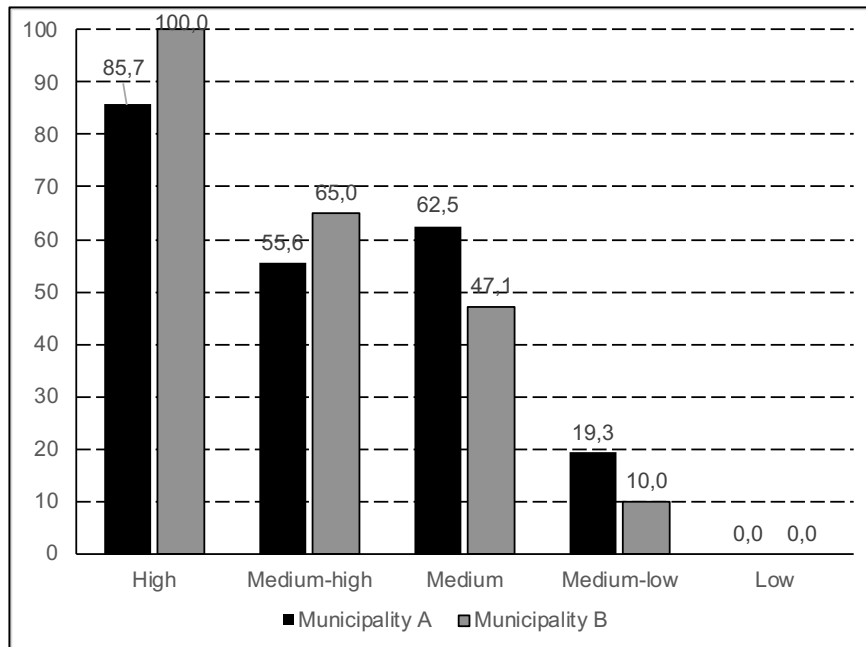


Figure 1. Schools using explicit selection methods by school students' SES average (%)  
Source: Own elaboration based on SIMCE parents' questionnaire.

Despite the intensive use of explicit selection processes among upper and middle SES schools, the evidence collected shows that the ways in which schools develop these practices are diverse and do not necessarily entail the use of entrance examinations or observation sessions. School principals reported a broad variety of methods utilized to carry out student selection, as well as to promote auto-exclusion among socioeconomically disadvantaged students. It is important to consider that, since student selection practices were formally prohibited in 2009, the use of these procedures has been a controversial issue in the Chilean education system. As a result, some of the principals interviewed recognized the increasing use of practices oriented towards “auto-selection” or “auto-exclusion”. The objective of these practices is that some specific families exclude themselves during the process of application, thus avoiding the need for explicit practices of selection. Of course, the use of these procedures of auto-selection does not necessarily imply that these schools fail to apply explicit processes of selection later on, but rather that their incidence is reduced as a consequence. Three main procedures of auto-selection have been identified among some of the schools analyzed. First, some schools charge a fee as a requirement to be part of the process of application. Although this practice was not directly acknowledged by any of the principals interviewed, in the interviews with families explicit references were made to this application fee as a requirement to access schooling and some of the school websites also refer to it. Second, families are required to actively participate during the process of application. Some principals confirmed that they use extended processes of application, which entail school meetings, family workshops and other social activities for several months of the year before children start the school. The main objective of the extended process of application is to ensure that the family demonstrates real commitment to the school, as well as setting up the possibility for parents to withdraw their children from the process. Third, informative sessions are delivered in order to make clear that the school does not have the will or capacity to enroll children from low socioeconomic backgrounds or with special needs. The next quote from a school principal in Municipality A summarizes how information sessions seek to promote some level of auto-exclusion among certain families at the application stage.



So, what we do is to bring all the parents together at some point in the year, something that we have done already, and we tell them: "Look, this is who we are, are you sure you want your child to come here? We do not have this, we do not have this, and we do not have this other" [...]. We tell them, but the worst of it is to see if anyone leaves. (Principal, Medium SES, private subsidized school, Municipality A)

In fact, this same school located some posters at the entrance of the building with explicit messages warning families of potential new students that the school charges fees ("we have cost sharing"), does not participate in the national program for socioeconomically disadvantaged students (Preferential School Subsidy) ("the school is not part of the PSS program") or even that it cannot support children with special needs ("we do not have professionals to attend to special education needs"). All of these messages are oriented towards preventing socioeconomically disadvantaged families and students from applying to the school, thereby avoiding the use of other forms of selection, such as interviews with families or entrance examinations.

To understand the broad dissemination of these selection practices among the schools located in both LEMs, it is important to take into account how much parents tolerate and even request them. For parents, selection practices are a way to ensure some level of social closure. School principals are aware of how families value selection requirements when it comes to choosing school and sometimes they use parents' attitude towards school selection as a justification for implementing student selection practices in their schools. On the other hand, interviews with families have shown how a certain level of social homogeneity is an important criterion of choice. As one mother argued, non-selective schools, mainly public schools, "are attended by people that maybe we don't want, it's not like discriminating against them, but we didn't want that for our daughter" (Mother, Private subsidized school, Medium SES, Municipality A). In this sense, for some middle- and high-income families, school segregation and social stratification among schools is not just a feature of the Chilean education system but something desired in a relatively open way.

Of note is the use of selection practices among schools already enrolling low SES and poorly performing students. In this case, selection practices are applied in an arbitrary manner with some of the students who come to the school to be enrolled. The use of selection in these schools is justified by school principals as a means to reduce the concentration of the most disadvantaged students in these schools, as the next quote summarizes:

Now, what I am doing is trying to do a bit... is to slightly filter the students, which means that, when new students arrive, we at least intuit what kinds of marks they have because we are already full of vulnerable students and low performance. So, what we also have to do is to enroll some students with a good performance record who are not in that condition [of vulnerability], in order to level up, because we were leveling down. (Principal, private subsidized school, Low SES, Municipality B)

In some way, these schools try to develop a de facto policy of desegregation due to the absence of an active public policy to reduce the high level of segregation in the Chilean educational system. They choose to adopt selection practices that allow them to reduce the concentration of socioeconomically disadvantaged students or those with very low academic performance. These practices have also been observed in some municipal schools that try to position themselves better in the market, despite the high level of vulnerability among the students they serve and their limited resources.

The perception and discourse of the majority of public schools' principals regarding students' selection compared to principals of private subsidized schools is also a point of interest. For them, their schools are asked to accomplish contradictory objectives as, on the one hand, they have to compete in the market with the other schools and, on the other, they need to have an inclusive orientation and enroll all profiles of students, including those expelled<sup>11</sup> - mainly from private subsidized schools. These contradictory objectives, together with their lack of capacity to develop students' selection practices, are experienced by public schools' principals as a competitive disadvantage. The next quote from a municipal school principal summarizes this perception:

Since we should not select students, we are at a disadvantage position because here we receive all the children who arrive. In the nearby subsidized schools, they select students and if the student repeats a course, he leaves the school. We cannot do that, here we have children who have repeated 2, 3 times the same course because they have learning difficulties, because they are alone, because their parents are in jail. So, we have here very different realities, as well as children who are really great. So, what can we do? You have to try to work for different levels, for different realities, and that is hard. [...] And of course, we never can put ourselves at the level of a private subsidized school. (Principal, public school, Low SES, Municipality B)

### **Diversification of School Policies and Practices: Excluding and Attracting the Poor**

The promotion of the diversification of school policies and practices is one of the objectives associated with the adoption of market policies (Levin, 1991). In this case, school diversification refers to the capacity of schools to differentiate what they offer based on curricular, pedagogical, religious or value approaches among other possible attributes. Education market theory expects that schools seek to develop pedagogical policies and practices, based on the preferences of families and students, with the objective of attracting them. However, among other aims, diversification is frequently used as a way to attract specific profiles of students, as well as exclude others. Since school diversification is often not necessarily related to the pedagogical dimension, symbolic attributes are often used to distinguish between schools amongst highly competitive LEMs. In fact, it is frequently the case that these symbolic attributes do not necessarily involve substantive changes in the daily practices of schools but are more related to the social codes valued by the targeted population of the schools (Lubienski, 2003). As in other contexts, the evidence available in the case of Chile demonstrates that market policies have not been successful in significantly increasing the levels of pedagogical diversification (Gauri, 1998; Ministerio de Educación, 2012; Villalobos & Salazar, 2014). However, the analysis carried out over the course of the current study has allowed us to identify other typologies of diversification, which combine pedagogical and non-pedagogical dimensions, as well as substantive and symbolic attributes. For the schools analyzed in both LEMs, the typologies identified were: social distinction, academic performance, alternative pedagogy, security, school climate, individual attention or special needs. Although an in-depth discussion of these typologies of diversification is beyond the scope of this paper, this section describes how diversification can become a soft mechanism of exclusion and how some of the typologies identified foster processes of exclusion. The relationship between diversification and social exclusion is not

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<sup>11</sup> Student expulsion is not analysed in this paper, mainly because of the lack of evidence to weight the importance of this phenomenon, due to the very controversial nature of the issue in Chile. It is worth mentioning that traditionally it has been a relatively common practice in the Chilean education system and frequently reported by public schools' principals.

unidirectional. While, for some schools, their diversification strategy is a means to attract families from the middle and upper classes, thereby excluding low-class families, for other schools, diversification is used to reinforce their market niches based on enrollment among poor populations, which increases the prevalence of socioeconomic segregation.

The most direct way in which exclusion takes place through school diversification involves schools that tailor their policies and practices as a way to offer a certain level of social distinction to families (4 out of 39 schools analyzed). This means that the main attribute used by these schools to attract families is their social composition, which is always in the form of middle- and upper-class students. In a way, the main attraction of these schools is social exclusivity, alongside a certain level of social closure as the main selling point in order to increase demand for their school. The majority of families interviewed connected with these schools refer to the social composition of the school as the first and main choice criterion. These families value the fact that their children have the opportunity to be in contact with other students from a similar or higher SES background during their schooling. Principals from these schools recognized the importance that the school social composition plays in attracting families. The next quote from a school principal, who was asked about the main point of attraction, summarizes how social distinction works as a diversification strategy and how families openly value the capacity of these schools to provide a socially homogenous environment:

[Families] come here because the father was a student here, or his friends at the university were students of the school, or their co-workers, who like what they like, how they work, are former students of the school, or because they have co-workers who have their children here and they have already told them about it. So, now, what do they tell us? What do they like about the school? They want these types of parents that I tell you about. (Principal, private independent school, High SES, Municipality A)

Another more indirect way to produce exclusion through diversification is appealing to the preferences and values of middle- and upper-class families. For example, an educational project based on alternative pedagogy (2 out of 39 schools analyzed) is attractive to some middle-class families, as well as acting as a way of excluding low SES families. Alternative pedagogy has been classified as any school that mainly uses non-directive teaching methods (e.g., Montessori or Waldorf). The interviews with families showed that some middle- and upper-class families look for and value these types of pedagogical approaches in order to avoid traditional pedagogies and methods of teaching, which, for them, are associated with the majority of Chilean schools. In contrast, lower-middle and low-class families value more discipline or security and therefore disregard schools based on alternative pedagogical approaches, since they perceive them to be less aligned with their choice preferences. Principals are aware of how their pedagogical approach has the capacity to attract a specific profile of students and, as a consequence, exclude others. In fact, the next quote from a principal of one of these schools summarizes how he has established a relationship between the alternative pedagogy approach of the school and the socioeconomic profile of families that the school is able to attract.

[The profile of families with students at this school] is that of progressive young professionals. I say progressive because they don't belong to the conservative tradition. They are also a product of capitalist modernity in Chile because they are part of a rising middle class, which has been promoted by neoliberal policies and also have a critical view on this reality [...] I think that they come here because of the search for a different project, which is more innovative in these areas, mainly

because of the authoritarianism that is highly present in Chilean schools.  
(Principal, private subsidized school, High SES, Municipality B)

Principals of schools according to this typology of diversification openly recognize that their school tries to reinforce the diversification project through the use of symbols and ideological or political references, which are valued by the targeted profile of families. In fact, interviews with families whose children attend these schools show that they often refer to symbolic attributes related to more open teaching methods, such as the absence of uniforms or the lack of a dress code, but that they are not able to provide a specific discourse about the pedagogical approach of the respective school. School principals are aware of the importance of these symbolic attributes in creating processes of self-selection and self-exclusion.

[...] that discourse is constructed so that a dad says: “Here, I am fine”. But someone who does not share this approach excludes himself because the educational project in action is saying to him this is not for me.” (Principal, private subsidized school, High SES, Municipality B)

On the other side of the education market, it is possible to identify some schools that have developed a niche in the market for low SES families, as one of the school principals recognized: “We attend to the vulnerable students and we are very happy with doing it” (principal, public school, Municipality A). These schools are aware that the main attributes valued by socioeconomically disadvantaged families are highly influenced by the context in which they live. These schools do not focus their diversification approach on pedagogical issues but on aspects related to the school climate, security or discipline. For this typology of schools, symbolic factors also play an important role in defining their diversification strategy.

Basically, here, what prevails is security, that is, people here, in fact, come here and say: “We are going to put it in this school because it is a safe school.” This already gives us an insight into what people are looking for, because it is safe. They live in an environment of insecurity, then they feel that the school is a safe place for their children, in this environment, in this school. [...] It’s a safe school, so suddenly some parents feel that it’s safer for them to be here at school, rather than at home. (Principal, private subsidized school, Medium-low SES, Municipality B)

The fact that these schools develop diversification responses oriented towards attracting the most disadvantaged students is the expected result from a highly socioeconomically segmented LEM, present in both the municipalities analyzed. However, despite this being considered a part of the rationale of the schools, this specific approach fosters the dynamics of school social segregation.

### **Marketing: Reinforcing Exclusion**

Finally, marketing practices developed by schools can also act as soft mechanisms of exclusion. In this context, marketing is understood as activities and initiatives developed by the school to communicate with potential applicants but also with families already enrolled in the school (Oplatka & Hemsley-Brown, 2004). Educational marketing, particularly in basic education, overcomes the traditional activities of advertising and entails a “wide and dynamic range of external relationships” (Foskett, 2002). Marketing, or the way in which schools communicate with the external environment, can play a crucial role in attracting specific families and students, as well as excluding others. Studies focused on marketing activities developed by schools, mainly in the U.S.

context, show that marketing is not just a way to attract new families and students, but also a mechanism used to limit access to low SES students or other minorities (Jabbar, 2016; Lubienski & Lee, 2016; Wilson & Carlsen, 2016). School marketing is a means by which to produce school “glossification” (Gewirtz et al., 1995), which entails the generation and dissemination of a specific school image. Of course, school marketing is intensely related to the diversification responses developed by schools (Zancajo, 2018). Frequently, marketing becomes the main method by which schools communicate with their more closed external environment and therefore an effective tool to attract specific profiles of families.

The evidence collected for the two LEMs analyzed shows that the intense use of marketing and promotional activities (e.g., flyers, posters, newspaper ads) is more common among schools with shortfalls in terms of demand, that is, schools that mainly enroll low SES students. These schools develop an extended marketing strategy in order to make themselves visible in a highly competitive education market and attract new demand, without a specific targeted population. Although there is a relationship between the use of marketing responses and the socioeconomic level of the school population, schools enrolling middle- and upper-class students also develop activities of marketing which have two key objectives: on the one hand, reinforcing the school image based on their diversification strategy; on the other hand, orienting their marketing activities to attract a specific target group of students by reinforcing their market niches. For example, some of the schools analyzed have established partnerships with preschools as way to attract their desired target population. These schools identify preschool educational institutions with a middle- and high-class population and try to establish a partnership with them in order to promote their school in these environments via flyers or presentations to parents of children in the preschools. Other common behavior related to marketing activities in these schools is to only advertise schools in areas of the municipality where middle- and upper-class families are concentrated.

In terms of school marketing, websites are acquiring an important role in schools' marketing. In the case of Municipality A, 8 out of 17 schools have a webpage, while, in Municipality B, 8 out of 14 schools have one. The existence of a webpage is more common in schools enrolling middle and high SES students. Interviews with families show that mainly middle- and upper-class families use school websites when putting together their initial choice set, alongside asking relatives and friends for information or visiting the school. In fact, school principals report that the content of their websites is sometimes used to produce self-selection or self-exclusion. Of course, this phenomenon is related to the diversification typology, but acts as an initial filter for families, as the next quote from a school principal makes clear.

Interviewer: Do you feel that some families check the website and, based on the information they find there, come to the school?

Principal: Parents should ask themselves: “Is this for me or not?” (Principal, private subsidized school, Medium-high SES, Municipality B)

## **Discussion**

As the article has shown in the case of the Chilean education market, processes and mechanisms that foster exclusion and school segregation take place in very different ways. In terms of the main focus of this article, the supply side, it has been possible to identify hard mechanisms of exclusion (i.e., school fees and student selection), as well as soft mechanisms, which produce exclusion in a more indirect way. While hard mechanisms of exclusion are relatively easy to detect, soft mechanisms, managed through marketing and the diversification of school policies and practices, act in a subtler manner, reinforcing the capacity of schools to attract specific profiles of

students and excluding others, mainly based on their socioeconomic background. In an education market context, semiotics plays an important role in the responses developed by schools to the incentives of competition. To a certain extent, it is not necessary to develop explicit processes of exclusion, but to appeal to the values and preferences of middle- and high-class families in order to attract them, while excluding other social groups that do not identify themselves with these cultural codes. Soft mechanisms of exclusion are not always the result of a conscious and explicit rationality or even strategy of schools; rather, they are an essential orientation of their logic of action when enacting market policies. As a consequence, it is difficult to discern to what extent processes of exclusion developed by some schools are the result of opportunistic behaviors or the inevitable consequence of their response to the incentives of a competitive environment.

The debate on the effects of privatization and pro-market policies has traditionally been controversial and highly ideological. Over the last three decades these policies have expanded across the world, still a relevant academic and political discussion is still taking place on how market-oriented policies impact on different dimensions, such as effectiveness, efficiency and equity. However, nowadays, there is a relative international consensus on the fact that, under some circumstances and policy designs, privatization and market policies could have a negative impact on equity<sup>12</sup>. Especially in the case of southern countries, the research has shown how these negative consequences particularly affect socioeconomically disadvantaged populations or ethnic minorities, fostering processes of school segregation and marginalization. In recent years this consensus has transcended the academic sphere and relevant international organizations have expressed concerns about the possible unintended consequences of these policies, particularly in terms of equity and for socioeconomically disadvantaged students. For example, the OECD has warned that voucher schemes and school competition can increase the socioeconomic stratification of schools and educational inequalities (OECD, 2012a, 2014). The 2017/18 edition of the UNESCO Global Education Monitoring Report points out that more regulation is needed to avoid opportunistic behavior on the part of private providers and negative effects of this on equity (UNESCO, 2017). Even the World Bank, traditionally an advocate of market-based solutions, recognizes in its *2018 World Development Report* that, in some cases, the rapid expansion of private provision can “undermine the political constituency for effective public schooling in the longer term” (World Bank, 2018, p. 177). Therefore, the World Bank recommends the development of effective regulatory frameworks to avoid discrimination and ensure that all providers pursue the public interest.

Independent of the controversy surrounding market solutions, a debate about regulation has emerged in response to processes of exclusion and negative impacts on equity. This relatively recent trend shows a significant change in the narrative and discourses of international organizations around the role of private providers and market mechanisms in education. After several decades of global expansion of these policies, nowadays concerns about the effects these policies have on equity have grown. In part, this recent trend can be explained as international evidence has shown how, up to a point, national education systems must improve equity as a way of making gains in terms of educational quality and performance (OECD, 2012b). Evidence on privatization and market policies not only show how these policies are not able to improve equity, but also how in some countries the

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<sup>12</sup> For example, in 2014 the United Nations Special Rapporteur on the right to education released a report warning about the negative consequences on social justice and equity of the increasing expansion of educational private provision worldwide. According to the report, these negative effects are mainly explained by “abusive practices” developed by some private providers (UN Special Rapporteur on the Right to Education, 2014).

involvement of private providers and the adoption of market mechanisms have led to the exclusion and marginalization of socially disadvantaged students.

However, given the evidence presented in this paper, as well as in other research, there are reasonable doubts about the capacity of new regulative frameworks or accountability devices to avoid the unintended consequences of pro-market and privatization policies. In contexts where market mechanisms, such as school choice and competition, still play a central role, it may be questioned whether it is possible to reduce the negative equity effects without significantly altering these mechanisms. In some cases, international organizations are advocating for higher levels of regulation or the establishment of accountability measures to avoid or reduce opportunistic behaviors with negative effects on equity. Yet, as this paper has shown: mechanisms of exclusion are complex; they can act in a subtle way (soft mechanisms of exclusion); it is not always possible to regulate them; and in some cases actors can even develop, more informally, other forms of exclusion. Here, the evidence available seems to show that market mechanisms of coordination, choice and competition, ensure that educational actors face a structure of incentives that can contradict the objectives of educational inclusion.

The debate around the capacity of markets and other forms of PPPs to foster educational equity and inclusion transcends the particular case of Chile. In the context of the new Sustainable Development Goals (SDGs; UN, 2015), in which the promotion of equitable education systems has acquired a central role, the capacity of pro-market policies to achieve educational equity objectives is open to question. Although different International Organizations have promoted the establishment of partnerships between the public and the private sectors or the adoption of choice and competition as a way to achieve the SDGs, the evidence has repeatedly shown how these interventions cannot only perpetuate existing inequalities but also increase them. Recently, organizations such as the World Bank or UNESCO (UNESCO, 2017; World Bank, 2018) have pointed out the need for new regulations or the establishment of accountability devices to ensure that private providers' practices or market mechanisms do not produce negative effects in terms of equity. However, the effectiveness of these proposals to deal with the negative effects on equity is still uncertain.

The effectiveness of education market regulations or compensatory policies to avoid negative effects regarding equity would depend on their capacity to grasp and deal with the demand- and supply-side mechanisms that produce exclusion and school segregation. In this sense, research on school choice policies has provided a large amount of necessary evidence to help understand the different patterns and rationalities developed by families when choosing a school. What is more, the academic literature has revealed how different social groups enact school choice policies in various forms depending on their socioeconomic background, and how this affects the equity (Ball, 2003; Canales et al., 2016; Schneider et al., 2000). That said, how educational providers are able to create processes of exclusion is still relatively under-analyzed. The evidence presented in this article shows that supply-side mechanisms of social exclusion are diverse and complex. Despite the hard mechanisms of exclusion, such as student selection and school fees, other mechanisms of a softer nature can also produce and reinforce the processes of exclusion. In particular, semiotics, in this case related to diversification and school marketing, can be effective in attracting specific profiles of families and students, as well as sometimes excluding socioeconomically disadvantaged students. Education market regulations, which are oriented towards compensating for the dynamics of school segregation and exclusion, need to consider how both demand and supply sides enact market policies beyond the expected responses according to education market theory.

Chile is nowadays a paradigmatic case for exploring the possibilities and effects of market regulation in a highly unequal education market. In 2015, the Chilean government passed a new education reform (the Inclusion Act), which mainly prohibits student selection practices, school fees

in publicly funded schools and for-profit schools in primary and secondary education (Bellei, 2016), with the objective of improving educational opportunities and reducing school segregation. Although this new regulation will be progressively implemented over the coming years, during which time its effects need to be evaluated, this represents a significant opportunity, on a national scale, to analyze the strengths and shortcomings of regulation in promoting equity and educational opportunities for all students in an education market framework. On the other hand, despite the policy design of this reform, knowing how educational actors (mainly schools and families) enact the new legal framework will be essential in determining the extent of its effects. However, the extent to which it is possible to foster educational inclusion and to reduce the level of social stratification in a market environment remains unclear. In an education market context, to influence the behavior of actors, competitive incentives can be more powerful than regulations or focused policies that try to promote inclusion. In a competitive environment, regulation aimed at encouraging inclusive practices through per capita funding, school choice and dissemination of test results can fail to alter the traditional exclusion practices developed by actors. Thus, the educational reform adopted in Chile since 2015 is not only informative regarding the capacity of the law to improve educational inclusion, but also about the feasibility of improving it when the education market's main features, choice and competition, have not been significantly altered. Finally, the Chilean experience could also provide evidence of the capacity of the reform, and particularly the policy and public discussion around inclusion, to alter the existing cultural and social tolerance towards social exclusion and school segregation.

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## Appendix

Table A-1

*Main characteristics of schools included in the sample*

							SIMCE average performance (4 <sup>th</sup> grade)		
Code and school type	Religious orientation	PSS <sup>a</sup>	Cost-sharing	Fee (Chilean pesos)	SES average <sup>b</sup>	Language	Mathematics	Natural sciences	
Municipality A	Public school 1	Secular	Yes	NA	Free	Medium-low	217	243	229
	Public school 2	Secular	Yes	NA	Free	Medium-low	212	203	213
	Public school 3	Secular	Yes	NA	Free	Low	213	219	228
	Public school 4	Secular	Yes	NA	Free	Medium-low	238	236	234
	Public school 5	Secular	Yes	NA	Free	Medium-low	247	237	236
	Public school 6	Secular	Yes	NA	Free	Medium-low	252	246	246
	Private subsidized school 7	Catholic	Yes	No	Free	Medium-low	280	258	261
	Private subsidized school 8	Secular	Yes	No	Free	Medium-low	248	252	229
	Private subsidized school 9	Secular	Yes	Yes	25.001 – 50.000	Medium-high	262	255	270
	Private subsidized school 10	Evangelical	No	Yes	25.001 – 50.000	Medium	287	255	261
	Private subsidized school 11	Catholic	No	Yes	25.001 – 50.000	Medium	260	272	273
	Private subsidized school 12	Catholic	Yes	Yes	25.001 – 50.000	Medium	289	292	291
	Private subsidized school 13	Catholic	No	Yes	10.001 – 25.000	Medium	301	294	278
	Private subsidized school 14	Evangelical	Yes	Yes	50.001 – 100.000	Medium	204	181	212
	Private subsidized school 15	Secular	No	Yes	50.001 – 100.000	High	290	283	283
	Private school 16	Secular	No	NA	50.001 – 100.000	Medium-high	267	240	244
	Private school 17	Secular	No	NA	More than 100.000	High	304	298	307

Table A-1 cont.

*Main characteristics of schools included in the sample*

	Code and school type	Religious orientation	PSS <sup>a</sup>	Cost-sharing	Fee (Chilean pesos)	SES average <sup>b</sup>	SIMCE average performance (4 <sup>th</sup> grade)		
							Language	Mathematics	Natural sciences
Municipality B	Public school 18	Secular	Yes	NA	Free	Low	252	247	244
	Public school 19	Secular	Yes	NA	Free	Low	243	228	238
	Public school 20	Secular	Yes	NA	Free	Low	251	232	222
	Private subsidized school 21	Secular	Yes	No	Free	Low	238	218	221
	Private subsidized school 22	Evangelical	Yes	No	Free	Medium-low	244	219	232
	Private subsidized school 23	Secular	Yes	No	Free	Medium-low	224	216	217
	Private subsidized school 24	Catholic	Yes	Yes	25.001 – 50.000	Medium	277	255	259
	Private subsidized school 25	Secular	No	Yes	25.001 – 50.000	Medium	261	234	254
	Private subsidized school 26	Catholic	No	Yes	50.001 – 100.000	Medium-high	309	291	292
	Private subsidized school 27	Catholic	No	Yes	50.001 – 100.000	Medium	300	285	283
	Private subsidized school 28	Secular	No	Yes	50.001 – 100.000	Medium-high	267	263	264
	Private subsidized school 29	Secular	No	Yes	50.001 – 100.000	Medium-high	286	294	304
	Private school 30	Catholic	No	NA	More than 100.000	High	282	266	278
Private school 31	Secular	No	NA	More than 100.000	High	318	325	323	

<sup>a</sup> Preferential School Subsidy (PSS) is a programme, voluntary for private subsidized schools, which allocates extra funds for each low-income student enrolled in the school. The participation of the school in this program can be understood as a proxy of its school population socioeconomic status.

<sup>b</sup> SES of the school was calculated as the average of students' SES, which has been estimated based on the following variables: level of family income, father's education, mother's education, and number of books at home.

NA: Not Applicable (public schools were not allowed to charge fees and private schools were not part of the cost-sharing scheme).



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