

**Schooling Markets: The Circulation, Creation, and Contestation of Charter School
Markets in the United States**

by

Dan Cohen

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Abstract

Despite being central feature of economic and social life, markets remain largely understudied within geography. Recently however, a geography of markets has emerged as scholars have begun to excavate the spatial dimensions of markets and their role in shaping the wider economy and everyday life. This dissertation contributes to this literature's development through the study of charter school policies, which have been used to create markets for publicly-funded schooling in the United States. As argued throughout the dissertation, the study of these schooling markets, which have been the site of fierce political struggles, can help contribute to our understanding of the role markets play in wider sociospatial processes.

Grounded in empirical fieldwork and utilizing a geographically-attuned approach to markets inspired by Polanyi and Gramsci, this dissertation approaches the study of charter school markets through case studies examining their functioning in two American states, Michigan and Oregon. It does so through asking the following questions: (1) How are market-making projects in American schooling being constructed, circulated and contested? (2) How have ideologies specific to schooling and education shaped the functioning of charter school markets? and (3) How are market-making 'projects' in education articulated with other sociospatial dynamics?

In answering these questions, I argue that, contra to their most common depictions, charter school markets cannot be understood through a narrow focus on the decisions made by actors within them. Instead, the exchange that takes place *within* these markets is structured by the institutions constructed *around* them, including struggles over their form and the wider power structures these struggles occur within. This understanding of markets has ramifications beyond schooling and offers new insights into how geographers can understand the role of markets within wider sociospatial relations.

Lay Summary

Over the past twenty-five years American education has been remade through a market-based model of education reform: charter schools. Since Minnesota passed the first charter school law in 1991, these schools have grown rapidly and now enroll 5.4% of American children. Premised on the idea that the ostensibly neutral hand of the market will improve schooling, the popularity of charter schools raises an important question: if charter school policies create markets, what type of markets are they?

This dissertation explores the political struggles over charter school markets in two American states, Michigan and Oregon, as a means of understanding how the functioning of charter school markets has been shaped by these struggles. The results of this study are then used to advance discussions on how markets function in general — making the argument that markets are often shaped by political struggles over market institutions and their spatial boundaries.

Preface

This dissertation is an original intellectual product of the author, Dan Cohen. The fieldwork reported herein was approved by the Research Ethics Board of the University of British Columbia (certificate #H14-01756).

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List of Abbreviations

ALEC	American Legislative Exchange Council
BID	Business Improvement District
CCCS	Centre for Contemporary Cultural Studies
CDA	Critical Discourse Analysis
CER	Center for Education Reform
CFDS	Coalition for the Future of Detroit Schoolchildren
DEC	Detroit Education Commission
DLC	Democratic Leadership Council
DPS	Detroit Public Schools
EAA	Education Achievement Authority
ESD	Excellent Schools Detroit
FOIA	Freedom of Information Act
GLEP	Great Lakes Education Project
KIPP	Knowledge is Power Program
NAACP	National Association for the Advancement of Colored People
NACSA	National Association of Charter School Authorizers
NCLB	No Child Left Behind
OEA	Oregon Education Association
ORCA	Oregon Connections Academy
ORVA	Oregon Virtual Academy
ORVED	Oregon Virtual Education
RTTP	Race to the Top Program
SSEM	Social studies of economization/marketization

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Chapter 1: Introduction

In a world saturated by money exchange, and everywhere mediated by money, the ‘market’ experience is *the* most immediate, daily and universal experience of the economic system for everyone. It is therefore not surprising that we take the market for granted, do not question what makes it possible, what it is founded or premised on (Hall, 1986: p. 38).

In the thirty years since Stuart Hall argued that markets are a universal reality of everyday life, their importance has only intensified. While Hall referred to markets as the sites where we experience the economic system, over the past several decades markets and market logics have expanded into a variety of social realms that had long been kept outside of market relations. Even within the formal economic realm, advances in technology have allowed for the disruption of stable markets and the creation of new ones to the extent that a person can access a market on their smartphone in order to outsource the assembly of a bookshelf. In other words, the market system that Hall refers to has expanded from a universal experience of the *economic* system to a universal experience that touches social relations considerably beyond the formal economy.

Despite their ubiquity however, Hall’s assertion that the foundations of markets remain unquestioned continues to be a salient critique. Indeed, it is only recently that markets have become an explicit object of study in economic geography. Instead, the subdiscipline has eschewed the study of markets in favour of a general focus on the realms of production and (to a lesser extent) circulation (Berndt and Boeckler, 2009; Sheppard, 2011). It is in addressing this thirty-year-old call that this dissertation makes its principal contribution. Rather than assuming that market structures are predictable or that they function entirely based on the balance between

supply and demand, the research presented below probes the political struggles¹ that constitute markets and shape their evolution. Importantly, this means that rather than understanding markets as spaces removed from their social contexts, I have instead focused on how markets are intimately enmeshed within social and spatial relations. This, of necessity, makes the study of markets a geographic inquiry, with markets shaped by, and in turn shaping, the spatial relations and orders within which they exist.

It is also crucial to note that this dissertation does not reflect the study of an abstract ‘market’ but of multiple, actually-existing markets that are situated in specific places and that deliver a tangible service. Namely, this dissertation is about the emergence of markets for publicly-funded schooling through the circulation, creation, and contestation of charter school policies since the early 1990s. As will be described in detail in Chapter 3, charter school policies are explicitly designed to create markets. They do so by allowing non-government, and often for-profit, actors to run schools but, crucially, only providing them with funding on a per-student basis. This creates a market for schooling because, unlike traditional public schools, charter schools are not assigned students but must actively recruit students in order to gain funding, placing both charter schools and students in a market relation. Charter schools must therefore maximize their intake of students in order to make the money they need to continue to run;

¹ I understand and use the term struggle throughout this dissertation to denote political contestations over which actors and/or what ideas will have influence over institutions such markets. This conception is influenced by the Gramscian conception of politics as open-ended sites of struggle (the war of position). As Hall (1988: p. 169, emphasis added) writes “Politics for [Gramsci] is not a dependent sphere. It is where forces and relations, in the economy, in society, in culture, have to be actively worked on to produce particular forms of power, forms of domination. This is the production of politics - politics as a production. This conception of politics is fundamentally contingent, fundamentally open-ended. There is no law of history which can predict what must inevitably be the outcome of a political *struggle*.”

similarly, students are positioned to view schooling as an individual choice where they must maximize their educational achievement through picking the correct school.

Unlike with the study of abstract markets then, the fact that charter school markets are markets for *schooling* matters. This is because schooling, and other goods and services, are far from passive containers for the smooth roll-out of market relations; instead, markets are articulated with the social structures and governing ideologies of the sectors producing the commodities to be exchanged in a marketplace. Indeed, education scholars have documented how schooling's important role in legitimizing the uneven distribution of resources under capitalism has often allowed it to have a relatively autonomous logic from the needs of capital (Apple, 1988). This is something that market-making projects in education must account for in order to be successful. Schooling therefore constitutes a contested terrain for the roll out of markets and this makes the social and political struggles that underpin the functioning of markets available for study in ways they may not be in more conventional markets.

This introductory chapter outlines the context within which this dissertation on charter school markets must be understood. The chapter therefore includes both an introduction to the cases that form the empirical basis of this dissertation as well as the research approach and methodologies used to understand these empirics. To accomplish this task the chapter is thus broken up into the following sections: (1) a brief outline of charter school markets and why they matter, (2) a description of the research questions approached through this study, (3) an explanation of the research approach and methodologies used in this dissertation, and, (4) an outline of the sections and chapters that follow and the key arguments found within. The purpose of this introductory chapter is therefore to foreground the contributions of this dissertation to

contemporary debates in economic geography and the sociology of education as well as to present the research methods that underpin the study presented.

1.1 Charter schools and the marketization of American education

Charter school policies, a market-based education reform, have been one of the most impressively mobile policies of the past several decades. From the date of the initial charter school law in Minnesota in 1991 to the end of 1998, thirty-five states adopted these laws and they have now been enacted in all but seven American states. The number of students attending charter schools has also grown at a rapid pace — between 2000-2001 and 2014-2015 enrolment in charter schools grew from 0.95% (448,343 students) of total enrolment nation-wide to 5.44% (2,721,786) (*Public Elementary/Secondary School Universe Survey, 2015*), a growth of over 500% in under 15 years.

The rapid spread of charter school policies is significant not only due to its speed, but because charter schools mark a radical departure from longstanding traditions of schooling in the United States. This is because charter school systems differ from existing models of delivering publicly-funded schooling by imposing competitive market pressures on schools. As briefly described above, the creation of these pressures has been accomplished through allowing non-government (and often for-profit) groups to run schools but tying their funding to their ability to attract individual students. Undertaking such a drastic change of an important public service has required a shift in how democratic rights in schooling are perceived. As Apple (2001) has argued, the promotion of charter schools and other market-based schooling reforms has been predicated on replacing the principle of democratic control over elected school boards with a view of democratic schooling as expressed through individual choice within a marketplace.

Despite this discursive work to establish markets as the epitome of democracy, charter school policies do maintain some level of government control over the delivery of schooling. Charter schools must apply to a government body, termed an authorizer, before they can open. They must also go through a periodic renewal process where that authorizer can choose to revoke their charter if they fail to achieve certain performance goals. As will be described in this dissertation, such restrictions on charter school operators are the result of political battles whereby groups opposed to market-based schooling have been able to assert a level of control over charter school markets. The specifics of how charter school markets function are therefore highly uneven and depend upon on the political context within which they exist. Because of this, the particularities of charter school laws vary from state-to-state, especially given that schooling is largely governed at the state level in the United States despite a recent growth in the federal role over schooling. Such differences include variations in the types of agencies empowered to authorize new charter schools, the reporting requirements placed on charter schools, state policies towards charter school closures, and in the amount of funding charter schools receive.

Charter schools are part of larger group of market-based education reforms, often grouped under the ‘school choice’ label, and therefore must be understood as part of a wider trend towards market rule over schooling and other social services. While the institutional forms of these market-based reforms in education vary, the ideology behind them is largely grounded in the neoliberal belief that public services can be provided more efficiently through market systems than through direct government delivery. This ideology was most famously presented in America by Milton Friedman (2002[1962]), who argued that schooling should be delivered by providing money to students and letting them choose the school they wished to attend (commonly referred to as voucher programs). Following in this heritage was the influential work

of Chubb and Moe (1988) who marshalled statistics that purportedly illustrated that private schools were more effective than public schools, arguing that the ‘exit option’, whereby students could exit schools they did not like, placed a competitive pressure on private schools that made them more efficient. Chubb and Moe then used this research to argue that public school systems should also incorporate the exit option as a means of improving the delivery of schooling. This ideology has helped support the spread of charter schools and related policies such as voucher programs which attempt to remake schooling to function as a market.

While largely dormant in the decades following Friedman’s work, school choice policies have more recently become popular throughout the Anglo-American sphere and beyond. The United States, England,² and New Zealand have all adopted school choice policies as has Sweden. This shift in control of publicly-funded schools to non-state actors has changed public schooling so profoundly that Stephen Ball (2012a) has gone so far as to refer to it as the ‘beginning of the end of state education.’ Similarly, Torres (2013) argues that we have seen the end of the 80-year dominance of the liberal ‘New School’ approach to education and its replacement with a new neoliberal common sense that instils competition at all stages of the schooling experience. Clearly charter schools are not a marginal policy intervention, but rather constitute part of a profound reshaping of the schooling landscape in the United States and elsewhere.

Importantly, and as will be reviewed in this dissertation, charter school markets have been promoted with the aid of a complex mixture of government, corporate, philanthropic, and political support. For example, the spread of charter schools has been closely linked with federal

²The other countries which make up the United Kingdom have not adopted school choice policies.

policy. Notably, George W. Bush's No Child Left Behind (NCLB) program helped promote the growth of charter schools by mandating that schools which did not reach targets based on standardized test scores could be replaced by a charter school. This move towards school choice was also reinforced by NCLB's financial support for the planning, program design, and implementation of charter schools (Mora and Christianakis, 2011). Following in these footsteps, Barack Obama's Race to the Top program (RTTP) had an even more explicit focus on markets and charter schools, requiring that states competing for federal education funding remove any restrictions on the number of new charter schools (Hursh, 2011; McGuinn, 2012; Mora and Christianakis, 2011). RTTP thus helped spur the creation of schooling markets and increased their popularity through material rewards and discursive support aimed at fostering their growth. Most recently, the appointment of Betsy DeVos,³ a longstanding supporter of voucher programs, as Secretary of Education signals a continuance and further evolution of this longstanding federal support for market-based school reforms.

These federal programs have been augmented and supported by a variety of sources. Some of the richest people in the world including the Walton family, Bill and Melinda Gates, and Eli and Edythe Broad have spent millions of dollars supporting the spread of charter school programs through lobbying and as well as through directly funding charter schools (Cohen and Lizotte, 2015; Mitchell and Lizotte, 2014; Scott, 2009). Corporations have also helped spread charter schools, including some such as K12 Inc. and Pearson Education that directly profit from providing services to, and directly running, charter schools. As will be explored throughout this

³ The DeVos family is one of the wealthiest families in Michigan (with an estimated net worth of over 5 billion USD) and exercises a great deal of political power within the state's Republican Party. For example, Betsy DeVos served as chairwoman of the Michigan Republican Party from 1992 to 2000 and her family has contributed hundreds of millions of dollars to the Republican Party nationally.

dissertation then, the functioning of charter school markets must be understood within the context of how these different actors have promoted market-based education reforms and specific types of charter school policies which work to their advantage.

Importantly however, the spread of charter schools and other market-based school reforms has been a spatially variegated process with some state and local governments at the forefront of creating public schooling markets and others emerging later and in a highly-contested manner. For example, the balance of power between political parties or the relative strength of teachers’ unions from state-to-state have greatly shaped how and when charter school policies have been adopted. This uneven geography can be seen in the differential level of charter school enrolment across the United States. As can be seen in Table 1.1, the difference between the percentage of students enrolled in charter schools varies significantly between states. Furthermore, even within states with a high level of charter school enrolment there can be significant variations in how charter school markets function. For example, states like Michigan have a large number of for-profit charter schools while others ban for-profit schools altogether (Kain, 2011). These variations highlight how we must pay close attention to the contextual factors that shape how charter school policies are implemented and function.

Table 1.1 States with highest and lowest charter school enrolment in 2013-14 (Public Elementary/Secondary School Universe Survey, 2015)

State	Enrollment	State	Enrollment
Arizona	17.8	Iowa	0.1
Colorado	10.9	Maine	0.2
Michigan	9.2	Wyoming	0.5
Utah	8.8	Kansas	0.5
Florida	8.5	New Hampshire	1.1

It is the articulation between the circulating geographies of power (federal programs, wealthy philanthropists, corporate power, etc.) that promote markets and place-specific contextual factors (local political context, teachers' union power, etc.) that is the subject of this dissertation. This approach is important because neither abstract discussions of how markets function nor highly-contingent descriptions of their form can capture the complex ways that power is used to promote certain types of markets or how the political context of actually-existing markets can sometimes resist the promotion of particular market forms from above. It is therefore the interplay between these two that is the subject of the work that follows, and, in exploring this interplay, I make the argument that markets must be understood as shaped by uneven power struggles over their operation — struggles that are not removed from their social context but inextricably linked to it.

1.2 Research questions

At the foreground of this project is the goal of addressing the challenge posed by Beckert (2009: p. 264) amongst others to “show how... structural forces actually influence market outcomes.” This requires research questions that are not solely focused on the specific markets studied, but which take into account their relationships with other social and economic processes. Of necessity then, understanding struggles over charter school markets requires research questions that probe how these struggles are enmeshed with broader power relations. This includes probing how ideas around charter schools have been circulated as well as how these new schooling markets are articulated to existing institutions of schooling and the sociospatial contexts within which they exist. The questions used to study these dynamics are as follows:

1. How are market-making projects in American schooling being constructed, circulated, and contested?

2. How have ideologies specific to schooling and education shaped the functioning of charter school markets?
3. How are market-making 'projects' in schooling articulated with other sociospatial dynamics and how do these dynamics shape the functioning of actually-existing charter school markets?

Each of these questions illuminate a different aspect of the struggles over charter school markets that have been central to shaping how they function. As outlined above, while charter school markets are largely governed at the state level (albeit with widescale variations between states), they are enmeshed with wider circulating geographies of power that seek to promote or resist these markets at the national and even global level. The precise nature of these relationships is the object of the first question on the construction, circulation, and contestation of charter school markets. As Lai (2011) and Prince (2012) have argued, markets are often shaped by the mobilization of expertise, money, and technology by powerful actors who attempt to impose their preferred market structures. Within the sociology of markets Fligstein (1996) refers to these preferred structures as 'conceptions of control' that represent a general understanding of how actors within a market believe that market should be governed. Fligstein argues that these conceptions can become fiercely contested when actors advance differing views of how a market should function, leading to changes in a market's structure. The ways in which such struggles over conceptions of how charter school markets should function lead to changes within these markets, and how these struggles are related to wider circulations of power are therefore a central feature of this dissertation and the subject of inquiry targeted by the first research question.

Also important to the study of charter school markets is understanding the difference it makes that these markets are for the delivery of *schooling*. This is the subject of the second research question on the relationship between charter school markets and ideologies associated with schooling. As the theoretical approach outlined in Chapters 2 and 3 highlights, understanding markets requires a focus on how and why markets become embroiled in wider social struggles such as those over the future of public education. This is because the types of goods and services traded in a market matters, as do perceptions of the consequences of market exchange. Given the importance of schooling in American culture, schooling markets have undoubtedly been shaped by how actors inside and outside of these markets react to the consequences of market exchange. As put by the Obama-era Secretary of Education Arne Duncan, the perceived stakes of education markets are high:

Quality education is... the civil rights issue of our generation. It is the only path out of poverty, the only road to a more equal, just, and fair society. In fact, I believe the fight for a quality education is about so much more than education. It is a fight for social justice.

(Confirmation of Arne Duncan, 2009: p. 13)

A view that was recently echoed by President Donald Trump who told a joint session of Congress that:

Education is the civil rights issue of our time. I am calling upon members of both parties to pass an education bill that funds school choice for disadvantaged youth, including millions of African-American and Latino children. (Kamenetz and Turner, 2017: para. 12-13)

This view of schooling as ‘more than education’ and as a path out of poverty is a common trope and, as outlined in Chapter 3, a central feature of ideological belief in America as an meritocratic society (Imbroscio, 2016; Kantor and Lowe, 2006). Given this strong belief in the importance of

schooling, how this conviction shapes the construction and functioning of schooling markets is an important object of inquiry and the subject of the second research question approached through this dissertation.

Finally, investigating the importance of space and place in the functioning of markets is the goal of the third research question that this dissertation seeks to address. As economic geographers have begun to study markets, they have also sought to probe what difference space and place makes in the structure of markets. Indeed, as Jones (2013) has provocatively argued, markets have often been in the background of economic geography, assigned as placeless sites of exchange that are peripheral to our understandings of spatial relations. Therefore, for the geography of markets to move forward, empirical research is needed to understand what the spaces that markets occupy are like and what roles they play in remaking spatial relations and spatial orders. Furthering our understanding of the role of space and place in markets, as well as how markets shape spatial relations, is the subject of the dissertation's third research question.

1.3 Research approach and methodology

1.3.1 Research approach

Investigating the three questions outlined above required a careful methodological approach. Because these questions draw attention to different scales of action, from the national circulation of policy to the urban politics of school reform, it is impossible to capture every element shaping charter school markets. This difficulty is, in fact, part of the point: markets are far more complex than commonly presented in fields like neoclassical economics. However, if social scientists were to eschew the study of complex social phenomena there would be little in the world to study. Following Shore and Wright (2011) then, this research project has been designed with the understanding that well-located cases can open 'windows' through which larger processes

become legible for study. As such this dissertation includes three cases that function as ‘windows’ into the processes that shape charter school markets: 1) an investigation into the history of market-based school reforms; 2) the study of charter school markets in Michigan;⁴ and, 3) a similar study of charter school markets in Oregon.

Studying the local dynamics of market-making was a necessary step in understanding the processes through which charter school markets are constructed and evolve. As Fairbanks (2009: p. 549) writes, markets have “endlessly mutable refractions that (re)canalize, exploit, and intensify inherited differences among regulatory landscapes.” This means that market-making processes cannot be read off solely from above but must be grounded though in a close attention to how markets are shaped and reshaped at the local level. By situating myself in Michigan and Oregon I was able to investigate the social natures of both markets while also probing the connections between the two sites and wider circulations of power.

Furthermore, while Michigan and Oregon are only two sites of a larger project of market making in American schooling, they are well positioned to help shine a light on processes that are operating throughout the United States. This is because they offer two different windows into how and why charter school markets converge and/or diverge and therefore into the ideological struggles which shape their formation and evolution. They offer different windows because the two states have very different charter school markets and political economic contexts. For one, Michigan’s level of enrolment in charter schools (9.2%) is far higher than Oregon’s (5.1%). The two also differ in the number of for-profit operators active in each state: as of 2011, 79% of

⁴ This study began with a focus on charter school markets solely in the City of Detroit with the idea that I would investigate markets at three scales: national, state-level, and urban. As the research progressed however the scope of this study was expanded as the importance of state-level policy in setting education policy and the regional nature of schooling markets made it impossible to narrow the study’s focus solely to Detroit.

Michigan charter schools were run by for-profit Education Management Organizations (EMOs) while this figure was closer to 2% in Oregon (Miron and Gulosino, 2013). The two cases thus offer important vantage points into how and why markets with a common connection to a national policy environment diverge and therefore insights into spatial relations and place-specific politics that shape charter school markets.

In order to study the connections and variations between the two sites I used an approach which Peck and Theodore (2012) refer to as ‘following the policy’ and that Wright and Reinhold (2011) refer to as ‘studying through.’ For both sets of scholars studying mobile policies requires more than just bounded case studies, they require a commitment to ‘follow’ or ‘study through’ the relationships between cases as scholars move “back and forth and back again between protagonists, and up and down and up again between a range of local and national sites” (Wright and Reinhold, 2011: p. 101). This requires a focus on both fixity and mobility (McCann, 2011) and therefore an investigation of both the sites where policies are made mobile and the places where they are implemented. Given the mobility of charter schools markets across the United States, understanding their functioning therefore required that my bounded case studies be read in conjunction with the study of how charter school policies have been mobilized.

For this reason, an approach sensitive to fixity and mobility was integrated into the design of this project in several ways. Most notably it was accomplished through the inclusion of an in-depth study of the history of the mobility of market-based school reforms in the United States as well as of the present-day national networks that focus on charter school advocacy. This research was designed to provide the important context within which the place-based research conducted in Michigan and Oregon could be understood. Logistically, this was in part accomplished through archival research as well as through charting advocacy networks online

through their presence on social networking sites such as Twitter (Ball, 2012b). Beyond this archival research, this project also involved physical attendance at conferences and other sites of face-to-face communication. This is because, as Cook and Ward (2012: p. 141) write, conferences are “important places where actors meet and talk face to face, which... shapes the way in which policies are disseminated, compared and framed.” Being present at various events where ideas around charter schools were mobilized and discussed helped deepen my understanding of the archival research conducted.

There are, of course, gaps in this research project that are a consequence of the methodological choice to focus on fixity/mobility. Understand how charter school markets have been circulated, created, and contested has meant that the lived experience of individual markets actors, particularly at the household level, is not the focus of this dissertation. This focus on fixity/mobility is a conscious decision, as how markets operate at the household level is an area that sociologists of education have covered well (see Ball, 2005; Cooper, 2005; DeSena, 2006; Pattillo, 2015; Vincent, 2017; Waitoller and Super, 2017) and the study of the geographic construction of charter school markets is therefore a unique contribution I am positioned to make as an economic geographer. However, in doing so it is important to note that dynamics at the household level, most notably the uneven burden that school choice places on female caregivers, is therefore not captured in this research. I have sought to address this in this dissertation by drawing on the research of others who have undertaken research at the household level; however, this weakness should be noted and as Jabbar et al. (2016) have argued, the gender dynamics of marketization are still in need of more in-depth study.

In summation, this research project was designed to examine both fixity and mobility through blending situated case studies with an attention to the movement of policies and ideas.

Through the use of well-situated windows into market making processes in American schooling and an attention to how ideas have been mobilized, I have been able to understand the ideological struggles over market forms and their relationship to place-based political contestations. In short, the project reported on in this dissertation was designed to ‘follow the market’ as it were, extending outward to national debates and examining how these debates articulate with the longstanding politics and spatial relations specific to two different case studies.

1.3.2 Research methods

In conducting the research for this dissertation, a variety of qualitative research tools were used. This included the observation of events, semi-structured interviews, and archival research. The methodologies used were consistent with, and designed based on, the Critical Discourse Analysis (CDA) method. I chose this method because it provides an excellent way to understand the nature of contested processes such as market making. This is because CDA demands that scholars place research data within the context of the wider power relations that produce them and requires a commitment to investigate how language or discourse is mobilized in service of these power relations (Wodak and Meyer, 2000). CDA therefore entails not only a focus on texts and research data but on the social structures within which they are produced and understood. This allows scholars to understand how texts are used both to stabilize existing power relations also how they can be used to contest those structures by advancing alternative meanings. As such, the CDA approach encourages scholarship that reads across multiple texts to understand how they relate to each other rather than focusing on a lone text or interview in isolation (Wodak and Meyer, 2000).

This approach lends itself well to both the multi-sited nature of this dissertation as well as to the study of schooling in general. CDA's focus on how texts are produced, understood, and contested within their social context provides a guide to the way multiple texts, and indeed multiple cases, can be put into dialogue. Within education scholarship, the use of CDA mirrors Lipman's (2011: p. 16) call for research that highlights the 'contested dynamics of power and wealth' which shape education policy. As Lipman argues, data such as interview transcripts and documentary research must be read within the context of the social and ideological forces that shape broader projects of education reform.

In practical terms this meant a mix of methods that variously involved following networks of policy and power as well as situated research in Michigan and Oregon. This research included 49 semi-structured interviews with 50⁵ participants (24 in Michigan, 17 in Oregon, and 9 national-level actors), documentary research, and sustained fieldwork including attendance at conferences and events over four months in Michigan, two months in Oregon, and at various national-level events.

For my two bounded case studies, I created Google Alerts for both "Oregon charter schools" and "Michigan charter schools" in order to capture all reporting on the subject. These were augmented with Google Alerts for the "Education Achievement Authority" and for "Detroit Public Schools" in order to identify articles particular to Detroit. The media reports gathered through these methods were then used to identify interview participants who were active in the politics around charter school markets in each state. Interview participants were also asked to identify other potential participants in the study in order to augment those identified through

⁵ One interview was conducted with two participants.

these media reports. In addition to these interviews, whenever possible I intended events such as protests, school board meetings, press conferences, and public lectures as a means of studying how the creation of markets was promoted/resisted through public debate. These research methods allowed for interviews and documents to be placed in their local context and for claims to be validated not only through the results of other interviews but also through a prolonged engagement with the politics of a place (Dunn, 2007).

The methods were supplemented by extensive documentary and video research using digital archives, correspondence released through Freedom of Information Act Requests, and public records of state legislatures. As noted above, this included media reports gathered through Google alerts. Other documentary research was conducted as needed to track the history of charter school laws. This included collecting meeting minutes and video recordings of state's legislative committees and other pertinent legislative bodies. In addition, several documents were provided to me by interview participants. These included documents obtained through FOIA requests as well as internal reports that helped provide context for legislative debates that had occurred in the past.

Studying the mobility of market-based school reforms required a different methodological approach. Given that charter schools first became mobile in the 1990s studying these policies, of necessity, required the use of primary and secondary sources which documented how and why charter schools became a 'mobile model' during that decade. In addition, I did not limit my research on the mobility of charter school models to the past but extended this research to charting the movement of ideas in the present day. As briefly discussed above, studying these networks included a mix of methods designed to monitor the spread of ideas and to conduct research at sites where these ideas were formulated and discussed. This

involved tracking these networks online through following their presence on social networking sites such as Twitter as well as attendance at national conferences where market-based education policies were promoted/resisted.

These methods proved to be well suited to the multi-site research approach outlined above. While each case could be considered distinct, they can best be understood in relation to each other, with the connections and divergences between them revealing much about the social and spatial nature of markets. By using CDA to analyse the results of the mixed-methods research conducted in Michigan, Oregon, and at the national level, I was able to understand the data gathered in these different sites in relation to each other and to the wider power relations that has shaped the politics of charter school markets.

1.4 Dissertation outline and key arguments

This dissertation is divided into two distinct parts. This two-part format has been used to draw a distinction between the theoretical and empirical portions of the dissertation. Such a format is necessary because the discussions in the first two chapters (Part 1) work together to form a cohesive whole — outlining both a definition of markets and an understanding of the political economy of schooling that, in tandem, set up the theoretical approach tested in the three empirical chapters that make up Part 2. This format and the specifics of each chapter are outlined below before the key arguments that run throughout all chapters are outlined.

1.4.1 Chapter outlines

The first part of the dissertation, *The Geography of Markets on the Contested Terrain of Education*, is made up of two chapters. Together, these chapters outline the theoretical underpinnings of the project.

Chapter 2, *Sites of Struggle: Markets as Ideology*, is both a literature review and an intervention into current debates in the geography of markets. In the chapter I review how markets have been conceptualized in different disciplinary traditions throughout the social sciences. Through doing so I highlight the tension between conceptions of markets that view their function as predictable and those that emphasize their contingency. In contrast, I argue instead that markets are best conceptualized as terrains of struggle where contingency of market forms is limited by the roles that markets play in the continual circulation and accumulation of capital. To do so I follow Burawoy (2003) in drawing upon the work of Karl Polanyi and Antonio Gramsci to build an understanding of how markets are not economic institutions separate from sociospatial relations but, instead, are key sites through which these relations are struggled over.

Chapter 3, *The Contested Terrain of Education: Legitimation, Social Reproduction, and Schooling in America*, is largely a literature review of the political economy of schooling in the United States. In this chapter I review different theories on the roles that schooling plays under American capitalism; this includes scholarship that emphasizes how alternative ideologies attached to education allows it a ‘relative autonomy’ from the dictates of capitalism. In doing so I discuss the idea of an ‘educational settlement’ whereby the often-contradictory demands placed on schooling are temporarily stabilized by the state’s attempts to balance these pressures. I then ask how market-based education reforms have altered the current educational settlement in light of arguments made by scholars like Rizvi and Lingard (2009) and Torres (2013) that neoliberal reforms have fundamentally upset the existing one.

Part 1 of the dissertation is then concluded with a discussion of how the two theoretical concepts outlined in Part 1 will be used in tandem in order to study charter school markets.

Because the conception of markets used in this dissertation posits that markets are terrains of social struggle over wider political battles such as that over the future of schooling, the study of charter school markets requires an understanding of what type of terrain schooling presents for processes of market-making. Taken together then, the two theoretical approaches outlined in Chapters 2 and 3 posit that schooling is a contested terrain for market-making projects and that the contradictory pressures placed on education are likely to manifest themselves in struggles over charter school markets.

Part 2 of this dissertation, *Markets in Action*, consists of three chapters which test this theoretical approach against the empirical projects outlined earlier in this introduction. Chapter 4, *Continual Circulation: The Mobility of Schooling Markets in the United States*, outlines how the spread of charter school policies has been shaped by different ideological groups seeking to advance their own visions for the future of schooling. Importantly, it tracks how this circulation of ideas has articulated with the specific places where charter school policies have been implemented. In doing so, the chapter not only highlights the importance of understanding how mobile networks promote different market visions but also the key role of existing geographies in shaping how these visions are implemented in places like Michigan and Oregon. The importance of these spatial relations highlights how marketization must be understood as shaped by the articulation between circulating geographies of power and the longstanding politics of a place.

Chapter 5, *Conceptions of Control: Libertarian Markets and Local Power*, delves further into the interaction between the politics of a place and market relations. Zooming in to the state level, this chapter examines how markets in Michigan and Oregon have been shaped by different ideological conceptions of how markets should function that are specific to each state. In

Michigan, with its strong libertarian base, charter school markets have been designed to function as closely to the ideal-type market as possible. In Oregon, a strong principle of local control has meant that the governance of charter school markets has revolved around the ability of individual school districts⁶ to control what market actors can operate within their boundaries. In both sites however, these conceptions of control have often been challenged and their maintenance has required constant political action. As such, although both states are quite different, the history of the evolution of their charter school markets illustrates how ideological struggles over markets are central to how they markets operate.

The final empirical chapter, Chapter 6: Race, Power, and Schooling Markets in Detroit, centres the role of geography in markets most explicitly. This chapter examines the functioning of charter school markets in the metropolitan region of Detroit. Through investigating how markets have operated differently across the metropolitan region based on patterns of racial segregation and based on how state power has been used to disenfranchise Black communities, the chapter highlights how markets are shaped by, and reshape, the geographies of the spaces they occupy. Indeed, I argue in this chapter that the way that schooling markets function in Detroit are impossible to disconnect from the longstanding history of racial segregation in the city and the racially-driven dismantling of its democratic institutions. How markets are spread and function must therefore be read within the spatial configurations that they exist within and across, and the uneven geographies of power which have created those configurations.

⁶ In the United States public schools are run by school districts and governed by democratically-elected school boards. These district's geographic boundaries often (but not always) mirror municipal boundaries but school districts are a separate political entity entirely devoted to the running of public schools. This system is designed to ensure that communities have input over their local school system.

The dissertation then ends with a concluding chapter which highlights the arguments that run throughout the dissertation (discussed below) and some future thoughts on what insights these cases offer into debates within the emerging geography of markets and on the study of market-based schooling policies. The chapter ends with a call for more intensive research projects that think across markets and which can therefore help populate alternative understandings of how markets function.

1.4.2 Key arguments

Running throughout all the chapters outlined above are several arguments made based on reading across the three case-as-windows. These arguments touch on both theoretical traditions reviewed in Part 1: (1) the geography of markets and (2) the political economy of schooling. In the concluding chapter (Chapter 7), I review the ramifications of these arguments for different theoretical literatures. At this point however, I will only provide a brief overview of these arguments in order to signpost the discussions that follow in the body of the dissertation.

1.4.2.1 Roll out, resistance, and the forging of markets through struggle

As will be outlined in Chapter 2, the central role that social struggles have played in the development of charter school markets is an important argument made throughout this dissertation. In opposition to both apolitical and deterministic descriptions of market functioning, in the chapters that follow I illustrate that struggle over charter school markets has had real effects on not only how charter school markets function but on the fact that such markets exist at all. This is because charter school policies themselves were born of decades of struggles over the roll out of market-based schooling reforms and acted as a compromise policy between those promoting markets and those with a much more tentative belief in their efficiency. Furthermore, similar political struggles have shaped the evolution of charter schools from this initial moment

to the present day. They have also been a feature at all scales of market governance, from the level of an individual school district to the contestation of nationally-circulating models of charter school reforms. Importantly however, such struggles have also unfolded on an uneven terrain, with actors mobilizing their power to ensure that markets are governed in a manner that fits their ideological beliefs or that work to their advantage. As such, that the functioning of charter school markets has, in many ways, been prefigured by the political battles over how they should be governed is a central argument of this dissertation.

1.4.2.2 Educational values: Market-making on contested terrain

Elaborating on this argument is another key point made in this dissertation: that it is important that the markets being struggled over are markets for *schooling*. This is because, as will be discussed in detail in Chapter 3, schools are ascribed several distinct values in American society that have shaped how political struggles over their form have occurred. Indeed, the politics of charter school markets are intimately related to the positioning of these markets as the means of achieving educational values — most notably, that the inequalities of capitalism can be remedied through schools providing a level playing field for advancement. Indeed, the quotes from Arne Duncan and President Trump from earlier in this chapter highlight the ubiquity of this narrative at the highest level of power. Therefore, the ways in which the politics of charter school markets are shaped by this value (and others) is an important thread running throughout this dissertation. For instance, I illustrate how arguments around social mobility provide discursive cover for the roll out of markets while also providing power to counterarguments mobilized in support of regulating charter school markets. The importance of understanding the difference that schooling makes in the functioning of these markets is therefore another key argument made in the chapters that follow.

1.4.2.3 Hegemony, contestation, and schooling markets

In close relation to both of the arguments made above is the role of neoliberal hegemony in the construction of schooling markets. While contestation has shaped the particular forms of different charter school markets, over the past several decades there has been a clear trend towards the deepening of market rule over American schooling. Indeed, beginning with the Reagan administration we can witness a consistent push towards remaking publicly-funded schooling in the image of an idealized market, with charter schools just one policy among many proposals advanced during this time. How the promotion of these market-based policies aligns with what Hall and O'Shea (2013: p. 10) refer to as the transformation of "what passes as common sense" in the vision of a market is therefore an important element in understanding the relentlessness with which markets have been promoted in places like Michigan and Oregon. As will be demonstrated through the empirical cases below then, the creation of charter school markets must therefore be placed within the context of wider political economic changes and especially within the wider march of market hegemony.

1.4.2.4 The spatiality of markets

Finally, in direct conversation with the emerging geography of markets, throughout the dissertation the role of space and place in the functioning of markets will be consistently highlighted. Arguments about the spatiality of markets are partially descriptive in the chapters below, in part based on necessity because, as Jones (2013; see also Christophers, 2014a; Hall, 2015) has argued, economic geographers have only begun to map out the spatiality of markets. In this context, simply highlighting these elements remains an essential task for geographers as they move towards a collective research program (Peck, 2012a). More substantively however, are my efforts to build upon the arguments made regarding markets as sites of social struggle

through illustrating how space and place are central to how struggles over markets occur. I argue that space and place are important to such struggles for two key reasons: (1) because the ability to bound markets to a defined territory is an important way of controlling the functioning of markets, thereby making this act of boundary-drawing a site of contestation; and, (2) because the politics of markets are often intertwined with the politics of the places and spaces they exist within, which means that struggles over markets can become key sites of struggles over the future of those places. In describing how markets in Michigan and Oregon are shaped through struggle then, I also explore the spatial relationships that play key roles in this process and that help shape how markets function.

Part 1: The Geography of Markets on the Contested Terrain of Education

The two chapters in Part 1 present the theoretical approach used throughout this dissertation. These chapters are kept separate because they discuss two literatures that have rarely been put into conversation: the study of markets and the study of schooling (although see Lubienski, 2003; Jabbar, 2015). In part, these two literatures have been kept separate because schooling has largely been kept out of market relations over the past century; however, as markets for publicly-funded education have grown in scale, studying schooling through studying how schooling markets function is now an important scholarly endeavor. As such, in Part 1 of this dissertation I review scholarship on both the social underpinnings of markets and the political economy of schooling. In doing so I develop an approach to the study of charter school markets that integrates lessons from both literatures.

Both chapters have been outlined in the introductory section above, so I will only briefly describe them here. In Chapter 2, I argue that markets are best conceptualized as neither the overly-determined sites of exchange presented in neoclassical and Marxist economics nor the contingent networks described in much of the sociology of markets; instead, I put forward an argument that markets can best be understood as sites of political contestation marked by uneven power, with their functioning shaped by the results of struggles over their form. In Chapter 3, I conduct a high-level review⁷ of the political economy of schooling and argue that education is the site of contradictory logics that shape institutions of schooling (including markets). In doing

⁷ This review is, of necessity, high-level because the audience for this dissertation is largely geographers. Therefore, much of what is reviewed would be considered assumed knowledge within the sociology of education but will be mostly new to geographers unfamiliar with education scholarship.

so I settle on the frame of an ‘educational settlement’ to describe how state schooling systems manage these contradictory logics and then move on to explore the current, neoliberal settlement.

That these two literatures have not often been put into discussion does not mean that they have nothing in common. Indeed, when one considers the interventions that the sociology of markets has made into the debate around conceptualizing market forms, some commonalities come to the fore. Many scholars within the sociology of markets have sought to uncover the social networks and institutions that constitute markets and the sociotechnical technologies which make them legible (Fligstein and Dauter, 2007; Fourcade, 2007). This parallels the focus of education scholars such as Morrow and Torres (1995) and Carnoy and Levin (1985) on schools as institutions of the state that balance competing pressures. In these conceptions, markets are not simply sites of exchange, and schools are not simply sites of education, they are rather dynamic institutions that reflect the social contexts within which they exist. As markets for schooling grow, this highlights a potential consonance in understanding how market-based schooling will be shaped by social networks, institutions and sociotechnical technologies specific to education.

More specific to the arguments made in both chapters though is a common focus on neoliberal hegemony in the current moment. In Chapter 2 I argue for the use of Burawoy’s blending of Polanyi and Gramsci to understand how markets are sites of hegemony and counterhegemony. This focus on a Gramscian notion of hegemony, specifically of the ideology of markets as ‘common sense’ also runs throughout much of the political economic literature in education. This is most obvious in the work of Michael Apple who has used Gramscian analysis to study education since the 1970s and 1980s (Gottesman, 2010) and in Gramsci’s continued influence on current scholarship on education (see Dumas, 2011; Lipman, 2013; Torres, 2013).

This recent work has much in common theoretically with this dissertation's proposed approach to studying markets. For example, Torres (2013: p. 91) refers to the neoliberal common sense around market efficiency as the "new theology of the market" and argues that "under this prevailing ideology, education becomes a consumer good not an inherent right." In seeking to understand how existing educational values (e.g. Torres description of education as an inherent right) are subsumed to this market common sense, these education scholars also study the complex articulation between markets and institutions of schooling.

Despite the fact that these two literatures are rarely put into conversation, there is therefore a commonality in seeking to understand the hegemony of the 'common sense' of market efficiency. In Part 1 of this dissertation then, I explore both sets of literatures to investigate different ways of conceptualizing markets and institutions of schooling. This is done to build the theoretical framework used throughout the dissertation and to lay the groundwork for the empirical investigations discussed in Part 2.

Chapter 2: Sites of Struggle: Markets as Ideology

Markets are everywhere. From buying groceries at the local supermarket to speculating on securitized mortgages, markets are fundamental to the organization of everyday life. This is truer now than ever, with the triumph of market ideology so prevalent that, as Doreen Massey wrote, the neoclassical assumption of market perfection has “become so deeply rooted in the structure of thought... that even the fact that it is an assumption seems to have been lost to view” (2013: p. 14). This ideology, which posits that markets are the most efficient and just method of governance (O’Neill, 1998), has led to the creation of new markets, as even calls for social and environmental justice are met with market-based responses such as voucher systems for education and carbon markets to reduce greenhouse gas emissions (Fraser, 2014). Yet despite their role in governing everyday life and as basic institutions of capitalist societies, it is only recently that economic geographers have taken up markets as sites worthy of study (Berndt and Boeckler, 2009; 2011b; Boeckler and Berndt, 2013; Hall, 2012; Jones, 2013; Peck, 2012a; Prince, 2012; Schoenberger, 2008; Smith, 2005). While this emerging literature has done much to enhance our understanding of how markets differ in form and function, many questions remain for the geography of markets that are relevant for this dissertation. Most notably: how should markets be defined, how do space and place shape the functioning of markets, and what roles do markets play in broader societal processes?

These challenges have remained unaddressed in part because geographers studying markets have conducted their work largely in opposition to orthodox versions of neoclassical and Marxist economics, both of which project a universal view of markets and their functioning. On the one hand, neoclassical economics’ assumption of efficient markets presumes the predictable behaviour of market actors regardless of social context (Barber, 1995; Milonakis and Fine,

2009). On the other, for Marxists, the ‘coercive laws of competition’ (Marx, [1867] 1990: p. 433) and the need for the continual circulation of capital place strict limits on the variability of market forms (McNally, 1993). As described by Karl Polanyi ([1944] 2001: p. 89), these two approaches have long polarized political economic thought, with “progress and perfectibility on the one hand, determinism and damnation on the other.” In contrast, recent work in geography has emphasized the contingency of market forms, using concepts from economic sociology to deconstruct markets and emphasize their complexity. For a distinctive geography of markets to emerge however, scholars in the field cannot forge their arguments solely in opposition to the dominance of neoclassical and Marxist thought but must also build a generative research program which studies the commonalities between markets and how their functioning shapes, and is shaped by, other social and economic processes (Muellerleile and Akers, 2015; Peck, 2012a). This is important for the study of charter school markets especially because, as will be argued in Chapter 3, schooling markets are tightly connected to a number of social processes specific to the sector.

It is with these questions in mind that this chapter reviews scholarship on markets both inside and outside of geography. Through undertaking a critical, but productive, review of different conceptions of markets found in classical political economy and recent work in economic geography and sociology, I develop an approach to markets that situates them within their political economic context without narrowly limiting how they can be understood. In particular, I argue that the scholarship of cultural Marxists and those using the work of Polanyi can help economic geographers move past the tension between new approaches to studying markets and the discipline’s longstanding tradition of productivist political economy (Braun, 2016; Christophers, 2014b; Muellerleile and Akers, 2015; Peck, 2012). Through centring

markets as sites of social struggle, cultural Marxists and Polanyian scholars have rejected deterministic readings of markets while still holding wider power relations within their frame of analysis. This approach is used in the empirical chapters of this dissertation to understand how (and why) charter school markets have been created and how their functioning is shaped by social struggles over the institutions which govern them. Furthermore, as discussed in the introduction to Part 2, it also provides a common basis for dialogue with scholarship in the sociology of education around the ideas of hegemony/counterhegemony.

2.1.1 Chapter outline

To make this argument I engage with multiple theories of markets as a means of highlighting why the geography of markets has emerged at this moment, what challenges it faces, and the potential of conceptualizing markets as sites of social struggle through a hybrid cultural Marxist/Polanyian framework (especially in regard to charter school markets). This is done in the four sections that follow this introduction: (1) an outline of why the geography of markets matters and three challenges for the subfield; (2) an examination of how markets are conceptualized within different theoretical traditions; (3) an engagement with cultural Marxist and Polanyian thought as a means of building a more generative geography of markets; and, (4) some concluding thoughts.

2.1.2 Defining markets

Before this review can begin however a tricky question must be approached: what do we mean when we talk about markets? While different conceptions of markets will be discussed below, a preliminary definition of markets is a necessary starting point for the comparison of these conceptions. That a simple definition for such a central economic concept is not readily apparent speaks to how rarely the origins of markets and the specifics of their functioning are discussed in

the social sciences and, therefore, the need for this review. As economist Douglass North (1977: p. 710) noted forty years ago, “It is a peculiar fact that the literature on economics and economic history contains so little discussion of the central institution that underlies neoclassical economics – the market.” The continuing relevance of this ‘peculiar fact’ means that what makes a market, ‘a market’ remains amorphous in economic geography.

Rosenbaum (2000) also highlights the ambiguity of the term ‘market’ and attempts to chart the commonalities between different definitions. In doing so he argues that definitions of markets almost always contain a conception of them as a site (not always physical) where exchange takes place between actors; in other words, where a buyer and seller of a good or service come together to exchange. Yet, as he further points out, markets must have a distinct function that distinguishes them as an analytical category from simple exchange. Undertaking further review, he argues that markets can best be distinguished through their role as sites of *institutionalized* forms of exchange that, at the very minimum, foster the development of routines between actors and thereby organize the way that exchange occurs.

Hodgson (2008) arrives at the same conclusion. He notes that when one explores the etymology of the term ‘market’, the modern understanding can be traced to physical sites such as the Greek *agora*, where exchange did not simply take place but was also *organized*. Following this logic, Hodgson, like Rosenbaum (2000), highlights that markets contain institutional structures, like rules or defined hierarchies, that undergird processes of exchange and allow them to occur (Hodgson, 2008). To Hodgson (2008) this means that “it is the degree of organization of exchange activity that makes markets different from relational exchange.”

By emphasizing the role of markets in the organization of exchange, these authors provide a framework within which we can understand them by drawing our attention to the

myriad institutions and structures that make up markets and allow them to function. In doing so they distil markets to a simple definition that can be used as the basis for the review that follows: markets are *sites where exchange is organized*.

2.2 Placing markets in economic geography: Three challenges

In geography, the study of markets began to emerge following the recent financial crisis and the subsequent revelation of how exotic financial instruments had reshaped housing markets in the United States. This engagement with markets as a research area mirrored a movement throughout the social sciences by scholars seeking to disrupt the taken-for-granted understanding of markets found within neoclassical economics (Boeckler and Berndt, 2013). For economic geographers, this focus on markets constituted a break from the long-standing disciplinary focus on production systems and supply chains, where “the market remains a black box and is simply taken as pre-given” (Berndt and Boeckler, 2009: p. 538-9) and where the explicit study (and problematization) of markets has been as a result limited (Jones, 2013; Peck, 2012a; Sheppard, 2011; Smith, 2005).

This post-financial crisis research agenda has begun the process of opening the ‘black box’ of markets and highlighted the diversity of market forms and of areas under market rule. A special issue of *Environment and Planning A* on ‘making markets’ illustrates the breadth of these projects. The issue includes case studies of the creation of markets for financial derivatives (Muellerleile, 2015), real estate (Akers, 2015), and greenhouse gas emissions (Cooper, 2015). The work therein and similar projects on agro-markets in Ghana (Ouma et al., 2013; Ouma, 2015), construction markets in the UK (Lovell and Smith, 2010) and street markets in Yemen (Lauermann, 2013) highlight the different spaces, scales, and fields that markets populate as well as the diverse methods through which they can be understood. For example, Cooper (2015) and

Lovell and Smith (2010) study markets through examining how technologies of calculation make disparate commodities commensurable and therefore suitable for market exchange. Muellerleile (2015), on the other hand, takes a historical approach, charting how the legal-regulatory system governing the market for financial derivatives gradually evolved out of the trade for agricultural products in Chicago. While they use different methods to understand market creation, these works have a common focus on the social, sociotechnical, and spatial constitution of markets that is consciously forged in opposition to the asocial market of neoclassical economics.

Peck (2012a) and Muellerleile and Akers (2015) note the promise of this work but argue that for the study of markets to evolve beyond a collection of individual research projects it must move past this oppositional approach and towards a constructive intellectual program that retheorizes the place of markets in society. Muellerleile and Akers (2015: p. 1784) specifically warn that “ignoring the possibility that actually existing markets may have some common characteristics across space and time, whether as a price mechanism or otherwise, will leave [the geography of markets] underspecified and incoherent.” By highlighting how current work in the subfield has yet to fully address what ties it together, this critique highlights several challenges for the nascent geography of markets.

The first challenge is careful consideration of what geographers mean when they refer to markets. While the general outlines of a research program can be seen through the cases discussed above, the specifics of what constitutes a market remain unclear. In their three-part review of the geography of markets for example, Berndt and Boeckler (2009; 2011b; Boeckler and Berndt, 2013) do not explicitly problematize the definition of markets, instead focusing on ‘marketization’ as a process through which goods and services are assigned value, made ready for exchange, and circulated (see also Birch and Siemiatycki, 2016; Bryant, 2016; Ouma et al.,

2013). Using this definition, geographers have extended the study of markets into realms of production in sectors such as agrifood (Ouma, 2015) or into the global circulation of commodities such as tomatoes (Berndt and Boeckler, 2011b). The question remains however of what roles markets themselves play within this broader process of marketization? While specificity in defining markets may not be needed to describe how actually existing markets break from neoclassical or Marxist depictions, if geographers want to build a cohesive subfield that addresses questions of why markets matter and how they factor into wider economic and social processes, they must be clear on their object of study.

The second challenge for geographers of markets is to provide a more fulsome exploration of the role of space and place in the functioning of markets. This includes not only the sites (physical or otherwise) where exchange takes place but also how market exchange remakes spatial relationships. To be clear, geographers have begun the process of unpacking how spatial relations are central to the functioning of markets. Most notably, there is a vibrant literature on how the contested process of geographically bounding a market renders it calculable and allows actors to make decisions (Berndt, 2013; Christophers, 2014a; Hall, 2015; Kama, 2014). Nevertheless, there is still much work to be done in understanding the spatiality of markets (Christophers, 2014a; Hall, 2015; Jones, 2013) and several unaddressed issues remain, such as how to understand the overlapping spatial relationships between markets (e.g. between the local, regional, and national markets for a commodity [Jones, 2013]). Given that existing geographic work on markets has relied on adding spatial elements to theories borrowed from economic sociology (more on this below), reflection is needed on the tension between these approaches and the spatial questions of interest to economic geographers.

Finally, the third challenge is to understand the roles that markets play in the societies and spaces they exist within. This challenge has been the subject of much debate within the subfield, with recent articles by Braun (2016), Christophers (2014b), Muellerleille and Akers (2015), and Peck (2012a) all posing the question of how the micro-politics of markets feed back into the macro-structures of capitalism. This can be understood in part as a reaction by political economists to an alternative approach to studying the economy. However, the stakes are higher than a disciplinary squabble. Understanding the role of markets in wider power structures is integral to unpacking how what happens within markets such as charter school markets impacts the social and economic processes outside of them. For example, Smith (2005) argues that that the roles of markets in these processes are not fixed and that “perhaps the politics and ethics of markets can be challenged not by arguing against markets, but by making a bid for them” (p. 17). On the other hand, Christophers questions the limits of a focus on market hybridity in challenging power, asking “if so much active work is involved in configuring and operating markets, and if in theory they are inherently contestable and fragile as a result, why, in reality, are they actually so incredibly resilient?” (2015: p. 1861). In light of these conflicting assertions, geographers of markets must explore how the demands placed on markets under capitalism may limit their hybridity and how what happens within markets is shaped by, and perhaps shapes, other social and economic processes.

Addressing these challenges is vital if the geography of markets is to follow Peck’s (2012a) and Muellerleille and Akers’s (2015) calls to build a constructive program. This is a necessary task for geographers seeking to understand how markets impact everyday life and feedback into the functioning of broader economic and social processes. As this chapter argues, there is great potential in using the work of cultural Marxists and Polanyian scholars to meet

these challenges; through conceptualizing markets as not just sites where exchange is organized but also as sites of contestation over the distribution of resources, geographers can develop a more thorough understanding of the roles that markets such as charter school markets play in sociospatial relations.

2.3 Perfection, damnation, and deconstruction: The theoretical foundations of the geography of markets

That geographers have only recently turned their attention to markets is not surprising given the vast shadow cast by neoclassical and Marxist economics. Both view markets as functioning in a largely predictable manner and geographers working in these traditions have therefore left the internal logics of markets mostly unexplored. While they hold vastly different visions of the results of market exchange with, in the words of Polanyi ([1944] 2001), one assuming perfection and the other damnation, conventional treatments in both neoclassical and Marxist thought tend to understand the functioning of markets as readily apparent and therefore as an area in need of little research. Given their dominance, the geography of markets has largely emerged in opposition to these theories by focusing on how markets vary in form and function. In breaking from neoclassical and Marxist conceptions of markets, these geographers have instead drawn on approaches from the sociology of markets which emphasize how the different networks, institutions, and technologies that surround the process of exchange shape how markets operate and evolve.

The two contrasting assertions outlined above, that markets are predictable and that they are contingent, constitute a tension that has helped prevent the geography of markets from addressing the three challenges discussed earlier. In this section I review the different theoretical traditions that underpin each assertion as a means of outlining the roots of this tension. First, I

review the predictable/determined markets of neoclassical and Marxist economics and why each tradition has eschewed the direct study of markets. Second, I review the contingent market described in the sociology of markets and how different schools of thought within sociology have described this contingency. At the end of these reviews I discuss how these different theoretical traditions have shaped economic geography and contributed to the shape of the emerging geography of markets. I conclude with a discussion of the tension between these two approaches and how cultural Marxist and Polanyian scholarship can help address it.

2.3.1 Perfection and damnation: Markets in neoclassical and Marxist economics

Despite their oppositional programs, orthodox Marxists and neoclassical economists both hold similar conceptions of markets as consisting of the smooth exchange of commodities, diverging on the likely effects of this functioning rather than on the nature of exchange itself (Berndt and Boeckler, 2009; Christophers, 2014b; Lie, 1997). As Harvey (2003: p. 143) writes, “Marx’s general theory of capital accumulation is constructed under certain crucial initial assumptions which broadly match those of classical political economy... [but] the brilliance of Marx’s dialectical method is to show that market liberalization... will not produce a harmonious state in which everyone is better off. It will instead produce ever greater levels of social inequality.” However, while in both conceptions market exchange is viewed as largely predictable and relatively smooth, there are important differences between them. As reviewed in detail below, for neoclassical economists markets consist solely of unattached actors exchanging to maximize profits, while for Marxist economists market actors are not unattached but rather constrained by the social relations found in production.

2.3.1.1 Markets in neoclassical economics

For neoclassical economists, markets are characterized by their asocial nature — they are sites of neutral exchange where buyers and sellers can find each other and, through a rivalrous process of determining a price and exchanging commodities, where supply and demand are balanced and scarce resources are allocated efficiently. The assumed neutrality of markets in the process of exchange has meant that the origins of, and the institutions that define, markets have largely gone unremarked in the discipline and that markets *themselves* are rarely studied (Barber, 1995; Douglass, 1977; Graeber, 2014; Jackson, 2007; Mirowski, 2007; Rosenbaum, 2000; Schoenberger, 2008). Much of what we can learn from neoclassical economics about markets is therefore from examining what is *not* included in their conceptualizations of how markets function.

An investigation of neoclassical economics must begin by understanding how economics evolved from political economy, a discipline that was broadly concerned with “the investigation of the causes of wealth and its distribution,” to economics, which is narrowly focused on the actions of individuals interacting in a separate sphere outside of society called the ‘economy’ (Milonakis and Fine, 2009: p. 97; see also Polyani [1944] 2001). This is because economics as we know it today emerged as economists attempted to fashion the discipline to be more ‘scientific’ using rigid, immutable laws to explain the workings of the economy in isolation from other social phenomena (Ackerman, 2002; Milonakis and Fine, 2009; Mirowski, 2007; Weintraub, 2002). Milonakis and Fine (2009) identify this shift as beginning with the marginalist revolution of the 1870s when the concept of marginal utility created a theory of prices as determined by the scarcity of an item and the ‘marginal’ utility a consumer receives from an additional unit of that commodity; as they write, marginal utility “gave a rationale for narrowing

the scope of economic investigation to the study of the problem of allocation under scarcity and the determination of prices, by focusing on market relations treated in isolation from their social and historical context” (p. 98).

This shift to a discipline focused on economic activity in isolation from other social dynamics further hardened in the 1950’s as mathematical modelling became the discipline’s dominant method of debate (Mirowski, 2007; Weintraub, 2002). As Lawson (2013) writes, the mathematical turn resulted in a discipline that has largely (but not completely) placed the following assumptions at the centre of mathematical models and therefore as outside of debate: (1) that the actions of individuals constitute the appropriate locus for understanding the economy;⁸ (2) that actors make decisions in some rational, usually utility-maximizing, manner; and, (3) that actors make decisions in a system where information is either perfectly or mostly available.⁹ This does not mean that neoclassical economists uniformly hold a naïve belief that every market functions in exactly this manner, but rather that as Mann (2013) writes, that any doubts about these assumptions are not reflected in their models built to simulate the economy and therefore in disciplinary debates.

⁸ This focus on the individual rationality is why the widely discussed move towards behavioural economics does not constitute a break from the neoclassical orthodoxy but rather an attempt to understand its failures while working largely within a neoclassical frame (Ponder and Wylly, 2013). While behavioural economics acknowledges that actors may act irrationally, this deviation still works within neoclassical assumptions about how markets are driven by individuals attempting to make decisions based in economic rationality and, instead, focuses on individual psychology to understand why actors make seemingly irrational decisions. In short, behavioural economics posits that actors think they are being rational rather than exploring the possibility that there are frames outside of economic rationality that guide decision making. Tellingly then, behavioural economics does not entertain the idea that markets are inherently social institutions. Therefore, as Berndt (2015) writes, in practice the behavioural turn has led to policy prescriptions that attempt to make people behave more like rational actors and does not constitute a break with neoclassical theory.

⁹ To this we might add the assumed homogeneity (and exchangeability) of commodities (Fine and Lapavistas, 2000).

Within the perfect market framework outlined by these principles there is little room for understanding how markets effect economic activity through the way that they *organize* exchange. Neoclassical conceptions of markets must therefore be understood through what is *missing* from their descriptions of a market's functioning rather than by what is present. As McCloskey (1996) writes:

The specifically neoclassical definition... is that economics is the study of choice in the ordinary business of life. To study choice is to fail to study other things... The Marxist study of Power, the institutionalist study of Habit, the Austrian¹⁰ study of Creativity are more or less subordinated in the neoclassical approach to what the neoclassicals are pleased to call “maximization under constraints” (p.122, original emphasis).

As the arena through which actors engage in choice, neoclassical conceptions of markets therefore leave little room for other considerations — they are simply sites where actors may exchange commodities unburdened by considerations other than utility maximization.

Neoclassical markets are therefore marked more by what lies outside of their walls than what actively constitutes their structures. In the neoclassical view, anything other than the rational actions by individuals to maximize their utility is a distortion of a market, an ‘imperfect’

¹⁰ While Austrian economics have had little purchase in economic geography, they are an interesting contrast to neoclassical theory. While on the level of ideology neoclassical and Austrian economics are often bedfellows, Austrian economists, especially Hayek, do not view markets as separate from social relations but rather as the ideal method of governing society. Unlike neoclassical economists, Hayek did not believe that markets contain perfect information, but rather that market mechanisms, through prices, provided signals to consumers that allow for the most efficient distribution of resources. Therefore, instead of conceiving of markets as sites with perfect information and equilibrium, Austrians see them as containing imperfect knowledge and uncertainty but nevertheless as vastly superior to central planning. However, since both traditions focus on the utility maximizing *homo economicus* (Madra and Adaman, 2014) and therefore believe that the way to understand markets is to understand how individuals negotiate the process of exchange, functionally the two approaches to markets are very similar (Milonakis and Fine, 2009; Mirowski, 2007).

form of competition. This is perhaps best explained by Jackson (2007) who argues that when economists discuss actually existing markets they do so along a continuum of ‘marketness’ where impersonal exchange and competition between strangers signals a more ‘natural’ market and social exchanges and cooperation mark a less natural market. As he writes:

Variation among markets is sometimes portrayed on a scale of ‘marketness’, with anonymous competition at one pole and fully personal exchange at the other... Such a purist approach condemns almost all observed trading to inferior non-market or near-market categories. (Jackson, 2007: p. 237).

For this reason, markets in neoclassical economics are best understood as places where the baggage of social life must be checked at the door — they are the space of exchange and only exchange. This erasure makes the functioning of markets predictable and therefore marks the way that markets organize exchange as unnecessary for study.

2.3.1.2 Markets in Marxist economics

By contrast, in Marxist thought markets are predictable not because of a lack of social connections between actors but because the nature of market exchange is overdetermined by its role in the continuation of capitalist social relations. This is because in orthodox Marxist thought markets play an important but largely *superficial* function (Christophers, 2014b). Markets are important because, as the sites where the disciplining force of competition is most strongly experienced, they ensure that capitalists and workers perform their roles in the continual circulation of capital. Importantly however, these roles are set through capitalist social relations as determined by the means of production rather than within markets themselves, with Marx ([1939] 1973: p. 752, emphasis added) writing that “competition executes the inner laws of

capital; makes them into compulsory laws towards the individual capital, but *it does not invent them. It realizes them.*”

Indeed, Marx’s approach is defined by its contrast to other works of classical political economy in *not* placing markets at the centre of economic theory. Most notably, in Volume 1 of *Capital* Marx famously rejects market exchange as the source of value and instead focuses on production as the site where capitalist accumulation can best be understood (Fine and Lapavistas, 2000; Kozel, 2013; Umney, 2013). This focus on production results in markets being viewed as largely unimportant in Marxist thought; as Christophers (2014b: p. 14) writes “because it is in production that value is created, and because it is value that is [Marx’s] central theoretical concern. Value is not created in exchange, hence exchange can be (relatively) sidelined.” So while market competition serves to execute the inner laws of capitalism, in Marxist thought the true source of these laws are found in the social relations particular to the capitalist mode of production.

The way that social relations prefigure the structures within which market exchange occurs can most clearly be seen in the Marxist understanding of labour markets. To Marxists the functioning of labour markets is predicated on the creation of a class of workers who rely on selling their labour for survival. Capitalist labour markets therefore cannot be understood through focusing on how rational actors choose to exchange their labour for a wage; rather, they are the downstream effect of the establishment of a system of social relations in which people are forced into a reliance on waged labour. In Marxian terms labour markets would not exist without the process of primitive accumulation that creates an army of exploitable workers (Clarke, 1995; McNally, 1993). According to Clarke (1995: p. 3) labour markets are indicative of the general role of markets in orthodox Marxism where they are seen “as no more than a passive reflection

of the social relations of capitalist production.” In this example, the functioning of labour markets is prefigured by capitalist social relations rather than shaped by the way labour markets organize exchange between workers and capital.

Importantly, this relation between market interactions and the underlying social relations they express is hidden by the fetishism of the commodity, whereby market actors see only the exchange taking place and not the social relations that underpin it. Commodity fetishism allows for markets, and not social relations, to be seen as holding a coercive power which requires actors (both capitalist and working class) to engage in ways that allow them to compete in a market. This is what Marx means when he writes that competition ‘executes’ the laws of capital but ‘does not invent them.’ Capitalist market exchange is how an individual worker sells their labour to a capitalist, or alternatively how a capitalist experiences the pressure that forces the cutting of costs, but at their root these pressures are the result of the mode of production which requires the constant circulation of capital to increase the capture of surplus value (Clarke, 1995; Kozel, 2013; McNally, 1993). Markets are therefore not only the result of social relations but also ensure the continuation of these relations through acting as a disciplinary force; as Kozel (2013: p. 71, original emphasis) writes:

Marx argues that the very exchange relations which mutually connect producer-exchangers appear to them not as social relations, but as an outside force they must obey. Even though producer-exchangers constitute the market through their interactions, the people involved become beholden to money and exchange-value... For these reasons Balibar argues that "fetishism is fundamentally *a theory of the market.*"

To orthodox Marxists then, markets, through competition, act as a coercive force that ensures that actors continue to play by the rules of capitalist social relations — relations that are

determined outside of market exchange. So, while markets may act to organize exchange, they do so in a way that is tied to the social relations of production. Such a conception leaves little room for understanding markets themselves as important sites (Block, 2011; Hall, 1986).

2.3.1.3 The determined market of neoclassical and Marxist thought

In economic geography, the dominance of first the neoclassical tradition and subsequently of the Marxist one, has meant that markets have rarely been an explicit object of study. On the contrary, economic geographers have largely eschewed moments of exchange in favour of studying the circulation of capital and systems of production. This includes Marxist scholarship as well as post-structuralist analyses, which study how gender, race, and other axes of difference shape the functioning of economic systems and vice versa (Sheppard, 2011).¹¹ This work, and work that trades more closely with neoclassical economics, tends to leave markets and processes of exchange untouched (Berndt and Boeckler, 2011b). There are of course exceptions: some Marxists do see a role for markets in structuring exchange since value cannot be realized until exchange occurs (see Karatani, 2003), but in these cases markets remain a second-order phenomenon used to understand how they affect production and the capture of surplus value (Christophers, 2014b).

This is not to say that Marxist scholarship has nothing to offer to the geography of markets. Marx's insights into the inherently unstable and crisis-ridden nature of capitalist expansion can provide a guide to how and why markets are created and undergo processes of change. In particular, it provides a clear explanation for why new fields are commodified as

¹¹ This, of course, does not mean that these approaches accept the description of markets found in neoclassical and Marxist economics; the opposite is true, and the notion that markets are social would hardly be a surprise to feminist economic geographers. It is rather to say that markets are not often the centre of research agendas in these approaches.

capital attempts to find new sources of profit in a never-ending quest to sustain growth (Harvey, 2003). Furthermore, as Christophers (2014b) argues, while Marxist thought does not help us to understand why markets vary in form and function, it can help us understand the limits to this variability since markets must work to ensure the continual circulation of capital.

Similarly, given how ideas within neoclassical economics have informed the neoliberal vision of a free-market utopia, it is important to pay attention to how the discipline has shaped actually-existing markets (Callon, 1998; Peck, 2010; Mann, 2013). With market design now an established field of study where economists seek to create markets that best reflect neoclassical thought (see for example the work of Alvin Roth), the way that powerful actors have used neoclassical ideas to produce particular methods of organizing exchange means that understanding neoclassical economics is essential for economic geographers.

What is clear however, is that these theoretical schools downplay the significance of markets. Neoclassical economics, almost by definition, views markets as outside the realm of debate; to study how markets are shaped by social relations would require questioning some of the core principles of the discipline. On the other hand, orthodox Marxism deemphasizes the study of markets and exchange through its focus on relations of production. Because of this eschewing of the study of markets, different theoretical tools are needed to address the challenges to the geography of markets outlined above. We cannot understand how and why markets vary in form and function, and how this impacts sociospatial relations, through theories that point in the opposite direction.

2.3.2 Deconstruction: Economic sociology and the geography of markets

Perhaps because of economic geography's lack of attention to markets and the dominance of neoclassical and Marxist approaches, geographers have turned to concepts from economic

sociology for the theoretical tools needed to understand their social underpinnings (Berndt and Boeckler, 2011b).¹² In contrast to neoclassical and Marxist conceptions of markets as predictable in form and function, work in the sociology of markets instead emphasizes their contingent and variable nature. Indeed, while economic sociologists have disparate views on the precise nature of markets, in general the subdiscipline holds a common conception of markets as spaces where social connections shape the nature of exchange and competition (Fligstein and Dauter, 2007; Fourcade, 2007; Ouma, 2015). For this reason, ideas from economic sociology have inspired much of the increased attention to markets in geography.

The sociology of markets is not a unified field however and there are multiple schools of thought within economic sociology on how markets can be conceptualized (Fligstein and Dauter, 2007; Fourcade, 2007). Fligstein and Dauter (2007) group these schools into three categories: 1) work that examines how networks are formed through multiple interactions between actors, often referred to as the embeddedness approach; 2) institutional analysis, which examines how formal and informal institutions set the rules within which markets operate; and 3) the social studies of economization/marketization (also known as the ‘performativity’ school), which examines how different theories, technologies, and non-human actors help to create or ‘perform’ markets.

While Fourcade (2007) cautions that each of these categories are themselves diverse, at a meso-level they describe the general understanding of markets held within economic sociology. In this

¹² There are of course approaches outside of this review that do not hold a deterministic view of market relations but which have not been widely used by geographers studying markets. The feminist attention to how gender shapes the economy, evolutionary economics’ focus on continual economic transformations, or even the Austrian view of the necessity of sublimating social relations to market rule also diverge from the understanding of markets held in neoclassical and Marxist economics.

section then, each approach will be briefly reviewed separately before their take-up in geography is discussed.

2.3.2.1 Networks and embedded markets

The embeddedness approach as named by one of its pioneers, Granovetter (1985), posits that, contrary to the atomistic actors assumed by neoclassical economics, market actors are often deeply embedded in personal ties of trust that shape the way that exchange occurs (Fourcade, 2007; Krippner and Alvarez, 2007; Lie, 1997). In Granovetter's (1985: p. 490) words: "The embeddedness argument stresses... the role of personal relations and structures (or "networks") of such relations in generating trust and discouraging malfeasance." According to scholars focusing on embeddedness, markets consist not only of actors engaging in arm's-length, economically-rational exchange, but also those that are exchanging on the basis of personal connections that have grown over time. This means that buyers and sellers may behave in economically irrational ways in order to maintain the personal ties they have developed with others active in a market. This view is contrary to even the more nuanced neoclassical approaches that focus on transaction costs or game theory because rather than assuming that actors make purely economic decisions designed to maximize profits over time, personal relationships may result in market actors making decisions that run counter to economic logic (Granovetter, 1985; Uzzi, 1996).

Embeddedness approaches therefore attempt to understand how social networks perform market functions such as sharing information and therefore how they organize market exchange (Mani and Moody, 2014). This means looking at relational networks such as how manufacturers monitor the actions of their competitors to identify a niche (White, 1981), or studying the social rules that structure long-term relationships between contractors and developers in construction

markets (Krippner et al., 2004). Embeddedness approaches do not only focus trust however, but also on the ways that market actors attempt to understand and even change markets using social relationships. For example, Baker (1990) highlights how manufacturing firms will choose to contract with several different banks in order to raise capital, while also maintaining a steady relationship with a particular bank for a majority of their transactions. This pattern of purchasing means that these firms are able to use social connections to structure the market to their advantage by ensuring they hold many relationships at the same time. In this way manufacturing firms do not only seek the best available deal in order to maximize profits but also arrange their connections to banks in a way that *shapes the market* by ensuring there are multiple firms with which to contract.

2.3.2.2 Institutional analysis and markets

Rather than focusing on individual actors, institutional approaches to the sociology of markets examine how the institutions that govern markets are created and how they stabilize market exchange (Fourcade, 2007; Fligstein and Dauter, 2007). These institutions include not only those within a market but also the wider legal and institutional context within which markets exist. As Fligstein and Dauter (2007: p. 19) write:

Institutional theory suggests not only that contractual market exchange depends on the rule setting and sanction enforcement of states, but also that states may define what types of products are appropriate for exchange. Furthermore, the internal structure of the state as rule setter and regulator can influence the types of products states allow to be exchanged and the rules supporting and surrounding exchange.

Hence institutional methods of studying markets diverge from the actor-centric approach common to both embeddedness and neoclassical scholarship. Institutional work does not limit

itself to studying individual actors undertaking exchange in a market but also to how markets are regulated.

Institutional approaches therefore understand individual decisions as shaped by the context of a particular market. Rather than making decisions based solely on utility maximization or individual relationships, actors must also adhere to the laws, regulations, and social norms of the specific market within which they are exchanging (Dobbin and Dowd, 2000; Fligstein, 1996; Fligstein and Dauter, 2007). Importantly, this includes an understanding of markets as dynamic institutions subject to change. For example, using the concept of ‘market as politics,’ Fligstein (1996) argues that political contestation shapes the ways that markets function, with actors that are advantaged by a market’s current structure attempting to stabilize the existing order while disadvantaged groups put forward alternate visions which he terms ‘conceptions of control.’ Institutional approaches within the sociology of markets therefore highlight how market exchange is shaped by the institutions that govern this exchange — institutions that are themselves contingent in nature.

2.3.2.3 Social studies of economization/marketization

The most recent school of the sociology of markets to emerge is the social studies of economization/marketization (SSEM) which is commonly referred to as the performativity approach. To scholars using this approach, markets are neither natural nor predetermined but rather ‘performed’ by actors who make decisions within a dense network of relationships. Because of the complexity of these relations, market actors must undertake a process of framing (also known as ‘performation’) as a means of creating a framework within which they can operate. This is accomplished through classifying some of these connections as part of a coherent thing referred to as the ‘market’ and others as outside of its boundaries, thereby performing the

act of boundary drawing. Importantly however, these relations do not only include connections between market actors like buyers, sellers, and regulators but also between these actors and non-human ones such as economic theories or mathematical models. This is important because these non-human actors, such as risk assessment models for stock trading (MacKenzie and Millo, 2003), are often a key method through which performance occurs — serving as calculative devices which delineate what is seen as market or non-market. By including non-human actors, the SSEM approach therefore draws attention to how technologies like mathematical modeling are not neutral but actively constitute markets (Boeckler and Berndt, 2013; Callon, 1998).

Callon (1998: p. 30) contrasts this approach to other schools within the sociology of markets, particularly the embeddedness approach, with the rejoinder that “the economy is embedded not in society but in economics.” By this he means that the process of performance is often driven by how the discipline of economics classifies economic activity. In this view, neoclassical ideals of the market are true insofar as those within markets believe them to be true and act to structure markets accordingly: as he writes “economics, in the broad sense of the term, performs, shape and formats the economy, rather than observing how it functions” (Callon, 1998: p. 2). To SSEM scholars then, actors are neither the completely asocial figures of neoclassical economics nor the socially-embedded decision makers of the embeddedness approach. Instead, market actors are world-makers, creating the economic worlds they inhabit through their interactions with each other and with other, non-human actors (Callon, 1998). Economists and economic theories therefore make and shape markets through framing how market actors understand what ‘markets’ are and how they should behave within them — although they often ‘overflow’ this narrow framing causing crisis (Ouma, 2015).

2.3.2.4 Geography and the sociology of markets

Despite these differences, approaches from the sociology of markets all illustrate how markets change in relation to the contingent social networks, institutional structures, and technologies and/or ideas that constitute them. This work has allowed for the emergence of a geography of markets that stands in contrast to Marxist and neoclassical thought. Rather than taking markets and the process of exchange for granted, geographers using approaches from sociology have highlighted how market exchange is always shaped by social connections between actors and therefore the necessity of undertaking in-depth research on the functioning of actually-existing markets. This has resulted in a growth in empirical projects focusing on the social and sociotechnical constitution of markets and how their contingent nature shapes the organization of exchange.

While geographers have used the notions of embeddedness (see Lai, 2011) and institutionalism (see Hall, 2007) to study markets, the most popular approach in the subfield has been the social studies of economization/marketization (SSEM). Despite being described as in its ‘initial stages’ as recently as 2009 (Berndt and Boeckler, 2009), the past several years have seen an increase in its popularity in economic geography. Using the ideas of Callon as well as other work using the SSEM method, geographers have studied markets as diverse as exotic animal auctions (Collard, 2014), business education markets (Hall and Appleyard, 2011), and emissions trading (Kama, 2014). The use of this approach has allowed geographers to focus on how markets function as highly contingent assemblages which turn commodities into calculable objects fit for exchange (Berndt and Boeckler, 2011b). For example, geographers have explored how the calculations and technologies used to establish fishing rights as a tradeable commodity have remade the salmon industry in Alaska (Hébert, 2014) and the UK (Cardwell, 2015).

This grounding in economic sociology has helped develop a vital literature with many strengths. By adopting a focus on the networks, institutions, and/or technologies and ideas that surround the process of exchange, geographers have illustrated how space and place are integral to the functioning of markets. This has included studying how China's emerging financial markets have been shaped by competing knowledge networks of Western experts and Chinese bankers (Lai, 2011), how construction markets are splintered into sub-markets (Lovell and Smith, 2010), and how markets for privately certified products such as Fair Trade goods depend on geographic imaginaries (Doherty, Smith, and Parker, 2015). In each case these authors have emphasized that the social/sociotechnical constitution of markets cannot be removed from its spatial context, with the clash between circulating models of finance and the existing Chinese banking sector resulting in a distinctly Chinese financial market, or the geographic imaginary of the fairly treated, hard-working Southern farmer supporting the development of Fair Trade markets.

A central feature of this work has been studying how the social/sociotechnical process of geographically bounding markets is essential to how markets operate. As Christophers (2014a: p. 754-755) deftly points out, it is difficult to discuss a market without referring to its geographical boundaries: "the French automobile market, the New York housing market, the global financial services market, and so on: when we attempt to identify and define markets, geographical scope... is invariably one of the key dimensions on which we do so." As geographers have illustrated, studying how these boundaries operate is essential to understanding the nature of markets. For example, Kama's (2014) work on emissions trading highlights how carbon markets could not exist without the contested process of boundary drawing which allows carbon emissions to be calculated and made available for trade. Or alternatively, Christophers (2014c)

has shown how pharmaceutical corporations use territorial boundaries to enable differential pricing and thereby increase their market power (see Berndt [2013] and Hall [2015] for other examples). In both cases, geographic boundaries are used to constitute a market, shape how it functions, and allow certain actors to gain power.

Similarly, a focus on the social/sociotechnical has allowed geographers to trace what Collard (2014) refers to as the ‘spatial momentum’ of markets. Collard argues that the ways that exchange is organized within a market can extend outwards to remake the relationships between sites and to create new geographies. Using the case of auctions for exotic wildlife in the United States, she writes that understanding the valuation and commodification of animals that occurs at these sites is essential to understanding the ecological impact of the exotic wildlife trade on the Guatemalan landscape. Likewise, Ouma (2015) traces how the shape of Ghanaian agrifood production along a just-in-time model was driven by competition in European retail markets. In both cases the specific social practices through which these markets assign a price remake the connections between places and reshape sites far removed from the marketplace itself. Here markets become a central node in the remaking of spatial relations.

Taken as a whole, this work highlights how approaches from the sociology of markets have helped economic geographers build an understanding of markets as complex institutions that require in-depth study. This constitutes a break from neoclassical and Marxist approaches. Embeddedness, institutional, and SSEM scholars all highlight how markets may change in relation to the contingent social networks, institutional structures, and/or ideas and technologies that constitute them; with their attention to space, geographers have been able to add to this literature in important new ways. In doing so, they have begun to build a subfield able to investigate how markets organize exchange — a long-neglected process in economic geography.

However, as hinted at earlier, and as is discussed in more detail below, there are limits to this approach that have been the target of critique from others within the subdiscipline.

2.3.3 Tensions in the geography of markets

The views of markets discussed above exist in considerable tension and this tension has permeated the geography of markets. While the study of markets requires a departure from neoclassical and Marxist thought, approaches from the sociology of markets have been critiqued for paying too much attention to the peculiarities of individual markets and not enough to how these markets are embedded within wider power dynamics. Thus, while the approaches borrowed from the sociology of markets are well suited to understand what Muellerleile (2013: p. 1638) refers to as the “internal logic by which markets function,” they are an uneasy fit with the political economic tradition in economic geography. Indeed, critiques of these approaches in both economic sociology (Krippner, 2002; Lie, 1997; Mirowski and Nik-Khah, 2007; Fourcade, 2007) and geography (Christophers, 2014b; 2015; Muellerleile, 2013; Muellerleile and Akers, 2015; Peck, 2012a) have made the point that a focus on deconstructing markets must be paired with an understanding of how markets fit within the operation of capitalist economies. As Lie (1997: p. 351) writes in a critique of the embeddedness approach that is relevant to the debate within geography:

In spite of avoiding market essentialism, the embeddedness approach in practice largely eschews analyzing historical and cultural variations in markets... Social networks exist inevitably within the larger historical and structural context. The embeddedness approach must itself be embedded in larger, historically transient, social structures - not only state institutions and suprastate organizations, but also historically shifting transnational relations and structures.

Understanding the relationship between the internal politics of markets and structures external to them thus remains an important challenge for the geography of markets.

Such critiques of a narrow focus on internal market dynamics are central to the most active debate within the geography of markets: how the contingency of markets feeds back into the macro-structures of capitalism. Recent articles by Braun (2016), Christophers (2014b), Jones (2013), Muellerleille and Akers (2015), and Peck (2012) have raised this question and sought to push geographers studying markets to consider how to integrate it into their research programs. Braun (2016: p. 258) sets the stage clearly, writing that “the empirical challenge, then, is to show how market devices, market structures and forms of capitalism are interwoven – that is, to establish both micro–meso and meso–macro connections.” For the most part these authors suggest that geographers design research projects focusing on the common elements between markets as a means of uncovering these connections. Peck (2012a) advocates using Polanyi’s concept of the ‘always embedded economy’ as the centre of a collective program which could investigate how markets are embedded in the specific social and spatial relations they exist within (see also Muellerleille, 2013). Jones (2013), on the other hand, suggests following the distinctive spatialities that shape markets as a means of creating a practice-oriented approach that could inform debates on market regulation.

Christophers (2014b) takes a different tack, arguing that a ‘weaker’ version of the social studies of economization/marketization (SSEM) approach is compatible with Marxist political economy. Drawing on Harvey, he argues that “capital will tolerate all manner of exchange (and distribution and consumption) structures, so long as they do not restrict accumulation for accumulation’s sake” (p. 19). In doing so he charts a way forward by emphasizing that the variability of markets may be constricted by the demands of ensuring the continual circulation

and accumulation of capital. Christophers therefore makes the case that geographers should use the SSEM approach as a method of studying how markets relate to value and the value form under capitalism. However, he does not provide a road map for doing so, instead writing that “much more can and needs to be said about this” (p. 19) and thereby neglecting the ‘meso’ step that Braun (2016) calls for in linking the micro-politics of markets to the macro-structures of capitalism.

Nevertheless, by drawing attention to how studying the limits of market forms can help reconcile the deconstruction of markets with Marxist political economy, Christophers provides the basis for advancing the conversation beyond an uneasy tension. It is in addressing the missing step identified by Braun (2016) that the work of cultural Marxists and Polanyian scholars has great potential. As will be explored in the next section, the work of these scholars allows us to probe how and why markets resist the limits imposed upon them under capitalism and therefore can help reconcile the tensions in the geography of markets. In this way they provide a framework for answering the question of how markets are connected to, shape, and reshape wider socioeconomic relations.

2.4 Markets as sites of struggle: Ways forward for economic geography

As outlined above, concepts from economic sociology have allowed geographers of markets to break from the longstanding focus on production and circulation in economic geography.

However, it is also clear that these concepts present challenges when placed in conversation with the discipline’s tradition of political economy. Below I argue that by integrating the work of cultural Marxists and Polanyian scholars into the existing geography of markets, geographers can best address this tension and move forward. This section first reviews cultural Marxist and

Polanyian scholarship on markets and then outlines the potential of using their insights to guide new work in the geography of markets.

2.4.1 Struggle in and over markets

The work of cultural Marxists and Polanyian scholars provides a general theoretical approach through which markets can be understood as variable while still keeping wider power relations within the frame. Scholarship in both traditions views the proliferation of markets as driven by capitalist accumulation while also conceptualizing social institutions like markets as sites of struggle that help to contain the most brutal of capitalism's destructive forces (Burawoy, 2003).

The work of cultural Marxists who study society as a terrain of struggle, and of Polanyian scholars who study the economy as a socioinstitutional domain, therefore present a method through which markets can be understood as driven by capitalist logics while not completely subsumed by them — or as variable within the 'finitude of possibility' set by capital (Christophers, 2014b: p. 15). This conceptualization has great potential in helping geographers understand how the variability of markets feeds back into the functioning of the wider economy and, conversely, how broader social and economic processes affect the internal functioning of markets.

Specifically, this potential lies in understanding markets not only as sites where exchange is organized but also as sites of struggle over the distribution of resources. Such an understanding is essential in the current moment where the expansion of market rule into new areas of everyday life has given added importance to struggles over the social/sociotechnical processes through which markets organize exchange. Polanyi ([1944] 2001), writing about an earlier era of market rule, argued that struggles over markets in such eras take the form of a 'double movement' whereby the most destructive effects of markets are met with opposition as society moves to

protect itself. This occurs when market rule is extended over what he refers to as the ‘fictitious commodities’ of land, labour, and money, which are described as fictitious because they are sold in markets despite not being originally produced for sale as commodities. The placement of these commodities within a market system is destructive because it reduces these ‘commodities’ to only those of their elements that have value in exchange, leading to the devaluation of human life or the ruination of the physical environment. In this way markets become a central site of class struggle as those negatively impacted by their functioning, largely the working class, attempt to protect themselves from attempts on the part of the dominant class to extend of market rule and the two classes use “government and business, state and industry, respectively [as] their strongholds” (Polanyi, [1944] 2001: 139).

Updating Polanyi’s ideas for the current moment, Fraser (2013) argues that the double movement fails to capture the importance of social reproduction and emancipation in struggles over the shape of markets. She makes the point that Polanyi’s theory cannot capture the importance of the post-1960s’ growth in emancipatory struggles against racism, imperialism, war, sexism, homophobia, ableism, and transphobia that do not fall neatly into the market/anti-market divide. For those fighting against these systems of oppression, the forces of social protection against the market (as embodied in the welfare state) have been as much of an enemy as the market system itself. Fraser thus sets up a three-sided conflict, or a triple movement, between pro-market, anti-market, and emancipatory political forces. Notably, there are no easy alliances between the three, with those pushing for emancipation often aligning with market projects promoted on the basis of opening access to resources that have long been closed to marginalized groups.

Burawoy (2003) sees parallels between Polanyi's work and the scholarship of culturally-oriented Marxists such as Gramsci who posit that society forms the terrain of class struggle. Like other Marxists, Gramsci viewed the economy as driven by the social mode of production, but on the terrain of the superstructure he believed that the shapes of capitalist societies are the result of a complex interplay of economic, social, and political dynamics. Gramsci argued that, through struggle, different societal formations could emerge in ways not entirely determined by capitalist logics (Burawoy, 2003; Hart, 2002). This focus on the indeterminacy of society can help us understand the workings of markets, since markets, understood as social/sociotechnical formulations, are also likely to be shaped by ideological struggles over their form.

Furthermore, Gramsci noted that these struggles often include the formation of 'historical blocs' where dominant powers promote ideologies that "create the terrain on which men move, acquire consciousness of their position, struggle, etc." (1971: p. 377). This is important in the current moment, where the dominant ideology is the ideology of market efficiency; As Hall (1986: p. 38, original emphasis) has described:

In a world saturated by money exchange, and everywhere mediated by money, the 'market' experience is *the* most immediate, daily and universal experience of the economic system for everyone... It is clear why we should generate, out of these fundamental categories for which we have found everyday words, phrases and idiomatic expressions in practical consciousness, the model of other social and political relations.

As Hall argues, markets are a central feature of modern society and the neoclassical ideal of the market has become the model for other social relations. This centrality of the market ideology means that markets, which can be considered one of the central features of the current historical bloc of neoliberalism, have become a necessary terrain upon which hegemonic struggles occur.

As such, struggles within markets are often part of a greater hegemonic project to promote, or resist, the ideology of market rule and, as Fraser (2013) highlights, markets also become the site of proxy battles in emancipatory struggles against other hegemonic forces.

Understanding markets as not only sites of struggle, but as key sites in wider contests over market hegemony is what distinguishes a hybrid Polanyian/cultural Marxist approach from others that also view markets as sites of struggle. For example, while Barry (2002), Callon (2005), and Fligstein (1996) focus on the internal dynamics through which market contestation is pacified and Bourdieu (2005) conceives of the economy as fields of struggle between firms, these conceptions are largely geared at internal market relations. In the conception advocated here however, the positioning of markets as sites where the compulsory laws of capital are fought over highlights how the internal politics of markets are often connected to a general contestation of market rule or the wider functioning of capitalist economies. In essence, struggles over how markets are governed, over their *ideology*, may cut across the particularities of specific markets and be a common occurrence across many market institutions. Indeed, Hall (1986: p. 36, original emphasis) argues that mounting an ideological struggle over markets was one of Marx's purposes in *Capital*, writing that:

There is no fixed and unalterable relation between what the market is, and how it is construed within an ideological or explanatory framework. We could even say that one of the purposes of *Capital* is precisely to *displace* the discourse of bourgeois political economy—the discourse in which the market is most usually and obviously understood—and to replace it with another discourse, that of the market as it fits into the marxist schema (p. 36).

Channeling Gramsci and following Hall's thought, we can therefore understand markets as shaped by the material force of market ideology while recognizing that this relationship is not *fixed and unalterable* but rather is itself the site of struggle; this recognition opens an understanding of the double or triple movement as an ideological struggle rather than the defensive one presented in Polanyi's double movement (Burawoy, 2003).

This line of reasoning is used by Burawoy (2003) when he puts the Polanyian notion of the double movement in conversation with a Gramscian understanding of hegemony to create what he calls a 'Sociological Marxism.' Central to this project for Burawoy is understanding the relationship of markets to society. In describing this agenda he writes, "Sociological Marxism's task is to understand under what conditions and in what form state and society will hold up the market juggernaut, throw up barriers to or rush headlong away from the commodification of land, labor, and money" (p. 244). Burawoy departs from orthodox Marxism in approaching markets as the central relation defining his approach. He does this based on the idea that, while production creates the basis for hegemony, counterhegemony is most likely to emerge from an ideological break with the market ideology in the manner predicted by Polanyi's double movement. As he writes:

Gramsci makes a convincing case that accumulation based on capitalist relations of production is the material basis of capitalist hegemony but errs in thinking that production, or at least the experience of production, can also provide the basis of counterhegemony... Whereas alienated and degraded labor may excite a limited alternative, it does not have the universalism of the market that touches everyone in multiple ways. It is the market, therefore, that offers possible grounds for counterhegemony (Burawoy, 2003: p. 231).

The ‘Sociological Marxism’ proffered by Burawoy thus places markets at the centre of struggles over civil society and offers a meso-level theory that can help geographers answer the challenges facing them. Drawing on Polanyi and, like Hall (1986), recognizing the commonality of the market experience, Burawoy suggests that a Gramscian understanding of hegemony and counterhegemony be focused on markets rather than production. This focus on counterhegemonic projects brings into markets not only class dynamics but, following Fraser (2013; 2014), an array of other struggles. This can be witnessed in the way that claims for justice become depoliticized through the creation of markets or the implementation of market solutions, with markets used to pacify resistance to capitalism’s excesses. For instance, calls for climate justice spur the creation of markets for greenhouse gas emissions and the increasing inequality of wealth is channelled into a demand for higher minimum wages on the labour market rather than other redistributive mechanisms. In this manner, markets become a central site for struggles over social and ecological justice.

Burawoy’s blending of the double movement with a Gramscian understanding of hegemony and counterhegemony therefore offers a bridge whereby the limits to market variability can still be held inside the frame while also studying differences between markets. Importantly, this is not to say that every market will include a double or triple movement whereby destructive tendencies are curbed or demands for justice change how a market operates. Indeed, Block (2011) points out that in an era where market ideology dominates, counterlogics are often overridden and battles between capitalists over exchange will dominate market structure. Barry (2002) further argues that markets are often sites of a strong anti-politics where the use of expertise and technologies of calculation overwhelm resistance to market rule (see also Ouma, 2015). What it does mean is that in *many* markets, especially markets where the

advantages accrued to powerful actors are clearly visible or where markets are explicitly used to address calls for redistributive justice, struggles over the shape of markets may include a counterhegemonic element that may help account for how and why markets diverge from the shapes assumed by rigid understandings of their functioning. While these struggles, and the markets that they occur within, are likely to be highly contingent based on the social context of actually-existing markets such as charter school markets, focusing on the hegemonic/counterhegemonic element allows these specificities to be placed within their large frame.

2.4.2 Markets as sites of sociospatial struggles

Returning to the tensions and challenges in economic geography, conceptualizing markets as sites of struggle in this manner provides several promising directions for the geography of markets as well as an approach that is useful for understanding charter school markets. Through linking the social struggles within markets to wider power relations, the approach outlined here provides a meso-level theory between the micro-politics of markets and the macro-structures of capitalism called for by Braun (2016) and others. In doing so it also allows geographers to move forward in addressing the challenges laid out earlier: (1) defining markets, (2) understanding the role of space and place in their functioning, and (3) studying their roles in the societies and spaces they exist within.

Regarding the definitional challenge, given the arguments by Polanyian and cultural Marxist scholars, it is clear that markets must be understood as more than just sites where exchange is organized. This limited definition fails to capture the complexity of markets in an era where market rule is a defining feature of everyday life and, therefore, where contestation is an important feature of many markets. In this light, a definition of markets as *terrains of struggle*

over the networks, institutions, and/or ideas and technologies through which exchange is organized allows geographers to be clear about what makes a market—the organization of exchange—without tightly binding markets to the act of exchange in isolation from other social processes. Importantly, keeping exchange central to the definition of a market also provides a focal point for the study of markets and allows geographers to highlight the commonalities that exist even amidst market variations. Conversely, including struggles over the social/sociotechnical methods of organizing exchange in the definition allows geographers to move outward from this focal point to exploring the array of market-shaping processes outlined by sociologists and to the role of markets in wider social and economic processes. Starting at exchange and moving outwards thereby provides a common thread that can address Muellerleile and Akers's (2015) concern about the incoherency of the subfield and the basis upon which a collective research project can emerge.

The insights of cultural Marxist and Polanyian scholars also provide a theoretical frame through which geographers can better understand the role of space and place in how markets function. This is because if markets are social institutions that are connected to other social struggles, so too are they connected to *sociospatial* struggles. Through investigating how markets become locally situated sites of contestation over broader social relations, geographers are presented with opportunities to bring the 'geographies of power' into further conversation with the study of markets (Prince, 2012: p. 140). Indeed, existing work within the discipline highlights how geographers have already begun to do so through examining how transnational networks of travelling expertise are used to set up particular kinds of markets (Cohen, 2017; Lai, 2011) or how capitalists engage in processes of boundary drawing around markets in order to maximize profits (Christophers, 2014c). As will be shown through the empirical cases of this dissertation,

more work of this nature is possible if the ways that the internal politics of markets are connected to broader social processes is integrated into research programs. By providing a theoretical framework for examining how broader dynamics such as the scalar politics of state restructuring or the financialization of the economy shape internal market struggles, this approach helps geographers conceptualize the articulation between the often place-based politics of markets and circulating geographies of power.

An approach centred on markets as sites of social struggle also has the potential to meet Jones's (2013) call to study how markets overlap and relate across different spaces and scales. Again, work within the geography of markets hints at this potential but takes on new significance when read within the frame of markets as sites of struggle. For instance, processes of boundary drawing around markets have already been a source of scholarship (Berndt, 2013; Christophers, 2014a; 2014c; Kama, 2014; Hall, 2015), but how and why groups contest and remake the scale of a market has significance beyond the politics of an individual market. Much as political ecologists have argued that the reorganization of scales of action is a method of asserting control over the environment (Swyngedouw and Heynen, 2003), so too is such reorganization a strategy for market actors who pick the scale of action which fits their mode of politics and advances their other projects (this process plays a key role in Oregon's charter school markets). These are just two possible examples of how understanding markets as sites of struggle unlocks new approaches to studying the role of space and place in markets. As many have emphasized, work studying the spatiality of markets is only in its nascent stage (Christophers, 2014a; 2014c; Hall, 2015; Jones, 2013). By linking the internal functioning of markets to other sociospatial processes, the approach outlined above can help in advancing this work.

Finally, it is in understanding the roles that markets play in the societies and spaces they exist within that this approach has perhaps the most potential. Taking up where Christophers (2014b) leaves off in questioning how the variability of market forms may be limited by their roles under capitalism, understanding markets as sites of struggle provides a mechanism to study both this variability and its limits. By probing how resistance to capitalist and other hegemonic logics is fostered within markets and how (or whether) power is used to ensure that markets continue to function in the circulation of capital, geographers have a method of exploring the missing meso-level connections between the micro-politics of markets and the macro-structures of capitalism. For example, through understanding how and why resistance to charter school markets is pacified, we can better understand the link between the functioning of individual charter school markets and the powerful actors who have a stake in particular ‘conceptions of control’ for these markets. Indeed, as will be explored in Chapters 4 and 5, the shape of charter school markets in places like Michigan and Oregon are almost impossible to understand without taking the actions of these powerful actors into account.

Importantly, the potential of this approach also includes tracing how changes within markets reverberate into other social relations. Geographers cannot be content to understand how power is marshalled to pacify markets, but must also study how contestation within markets can impact other social and economic processes. For example, geographers could explore how contestation over how a market functions is received by the various circuits of power invested in that market’s structure, or how different struggles against market rule are connected. As will be illustrated in Chapter 6, this could include tracing how social movements in cities understand and contest the simultaneous marketization of housing, schooling, and welfare systems. In following such movements in either direction, the priority must be examining how changes in markets are

linked to, and perhaps change, other arenas of social and economic life. In doing so this approach can build on economic geography's long history of studying the sociospatial connections that link seemingly disparate phenomena.

2.5 Conclusions

This chapter has argued that an approach to markets which highlights their role in social struggles can help geographers understand variation between markets and the potential limits to this variability under capitalism. Economic geographers cannot limit the study of markets to deconstructing how they function but must also probe how markets are tied to capitalist logics, how they become proxy sites of other hegemonic struggles, and how resistance is built within their institutional walls (Block, 2011). Empirical work probing these questions is especially important if Burawoy (2003) is right and there is the potential for counterhegemonic projects *within* markets. If this is the case, then geographers must study how such projects arise, and the characteristics of the particular markets that allow them to do so. Or, if it not the case, what are the geographies of power marshalled in defence of markets and how do they work?

The task of undertaking such empirical work is a central driver of this dissertation. By investigating schooling markets, I have been able to probe the role of social struggles, including ideological struggles, in shaping how charter school markets function in Michigan and Oregon. As I hope the subsequent chapters illustrate, the sociological Marxist approach described by Burawoy (2003) and used in this dissertation, has allowed both the particulars of individual charter school markets as well as wider social and political relations that surround schooling to be kept within the frame. In doing so, the hope is to contribute to the task of building a vital discussion in geography on the role of markets in wider social and economic processes and in understanding how these processes shape the functioning of actually-existing markets.

Chapter 3: The Contested Terrain of Education: Legitimation, Social Reproduction, and Schooling in America

“As the son of a tenant farmer, I know that education is the only valid passport from poverty” – President Lyndon Johnson, 1965 (*LBJ Presidential Library*, n.d.).

“Education isn’t just another issue. It is the most powerful force for accelerating economic growth, reducing poverty and lifting middle-class living standards” – *New York Times* editorial, 2017 (Leonhaardt, 2017).

The narrative of education being *the* solution to the problem of poverty and a key driver of economic growth has long been a central plank of American social policy. From when President Johnson signed the Elementary and Secondary Education Act in 1965 to the present day, education policy has been promoted as more than just a method of governing schools, it has been viewed as a means through which economic and racial injustices can be addressed (Kantor and Lowe, 2006). Such expectations have meant that institutions of schooling must manage often-contradictory pressures that require them to not only prepare students for the labour market but also to fulfil multiple other roles in societal reproduction. Given the assertion in the last chapter that markets must be understood within the context of the political, economic, and social processes they are enmeshed with, the study of schooling markets requires an attention to the dynamics that shape schools and, therefore, that are likely to shape schooling markets. With this in mind, in this chapter I explore the contradictory pressures that characterize the politics of education in the United States and, through doing so, set up the second half of the approach used in this dissertation to study charter school markets. Due to the primary audience of this

dissertation, much of this review will cover what sociologists of education might consider assumed knowledge but that is necessary to cover for geographers unfamiliar with the subject matter.

Such an examination is necessary because education plays multiple important roles in contemporary society that require close attention if we want to understand the emergence of schooling markets and their continued reinvention. For example, schools, as the sites where children learn the written and unwritten rules of society, are central to the reproduction of the social order — in the words of Althusser (1971), schools have “the dominant role [in instilling ideologies], although hardly anyone lends an ear to [their] music.” Beyond instilling ideology, schools are also asked to prepare students for the labour market, enhance economic competitiveness, and justify the streaming of children into different social classes. These roles often place contradictory requirements on institutions of schooling, causing conflict between groups which emphasize a particular role at the expense of others. As such, in order to understand schooling markets, the ways in which these contradictory pressures are managed by institutions of schooling must be investigated.

In this chapter then, I explore the political economy of schooling as a method of understanding how the contradictory roles placed upon schools are likely to manifest as conflicts within charter school markets; for if, as education scholars have long understood, public schooling is the site of fierce social struggles (Apple, 2016; Baron et al., 1981; Greaves et al., 2007), then how charter school markets fit into these struggles will be an important aspect in shaping their form. Drawing on the Centre for Contemporary Cultural Studies’ (Baron et al., 1981) notion of ‘educational settlements’ as temporary, state-led agreements on how to manage

these conflicting pressures, I question whether charter schools are disrupting these agreements, arguing that there are signs that they are but that this remains a still-evolving process.

3.1.1 Chapter outline

In order to understand the pressures that are likely to shape schooling markets, I review literature on schooling in four sections: (1) a discussion of the political economy of education including how reproduction and resistance theorists understand the place of education in capitalist societies; (2) a review of how these different theorizations are used to conceptualize the role of the state in providing education, including introducing the concept of the ‘educational settlement’; (3) an exploration of how these theories have been used to understand the current, neoliberal moment and what this says about whether a new educational settlement is emerging; and, (4) some concluding thoughts on how the above relates to the study of charter school markets. As noted above, because this dissertation is primarily aimed at a disciplinary audience, geography, that has traditionally had a limited engagement with the study of schools (Hanson-Thiem, 2009; Nguyen et al., 2017), much of this review covers terrain which will be familiar to scholars from the sociology of education.

3.2 Education, correspondence, and resistance: The contradictory place of education in capitalism

Education, despite being on the periphery of geographic thought, is at the centre of reproducing the ideologies through which people understand their everyday existence (Hanson-Thiem, 2009). Indeed, Althusser (1971) famously argued that education is the modern institution most responsible for promoting the ideologies that ensure capitalist hegemony. Furthermore, education is also crucial to the reproduction of sexist, racist, and heteronormative ideologies (Arnot, 2002; Leonardo, 2004; 2012) and, as Morrow and Torres (1995) argue, the role of education in

instilling ideologies is not limited to capitalist societies but was also a feature of the Soviet education system. It is for this reason that Morrow and Torres (1995) argue for centering the study of societal reproduction and disruption in the sociology of education, writing that the discipline “must make sense of the contribution of educational activity to the processes of socialization as a source of social continuity and potential discontinuity, or reproduction of the given and production of the new” (p. 7).

Give the role of education in social reproduction (and its potential for social disruption), in this section I review how scholars of education have understood the roles of schooling in reproducing capitalism and resisting its hegemony. This will primarily include a discussion of the dialectic of reproduction and resistance that scholars like Giroux (1983) posit as central to understanding how schooling institutions have evolved. Specifically, this section will be broken up into three parts: (1) an examination of the work of reproduction theorists such as Althusser, Bowles and Gintis, and Bourdieu and Passeron; (2) a discussion of the critique of these works and how it has highlighted the role of resistance in shaping schooling; and, (3) some thoughts on how the dialectic between the two continues to shape how we understand capitalist education.

3.2.1 Reproduction theories of education

In the 1970s Marxist scholars began to explore the ways in which education is integral to the reproduction of capitalist society. Notable in this regard was the work of Althusser (1971) on the reproduction of capitalist ideologies, Bowles and Gintis (1976) on the correspondence between the needs of capital and the structure of the education system in the United States, and Bourdieu and Passeron (1977) on the role of schools in reproducing social class. Common across all three sets of works was an understanding of education as a system closely tied to the needs of capital rather than as one with strong dynamics of its own.

According to Althusser (1971), schools work to ensure the reproduction of capitalist relations over time. They do so through fulfilling their role as an Ideological State Apparatus (ISA), which he defines as an institution that helps reproduce capitalism through instilling ideologies that promote the capitalist system as just and fair. This means that ISAs like schools work to promote ideas and practices through which the working class can understand their domination as legitimate, thereby precluding any questioning of the social order. Althusser places education as the central ISA of modern capitalism because no other state apparatus has access to children for a sustained period while they are in their developmental stages; this makes the school an ideal location for the transference of dominant ideologies.

Importantly, Althusser, also argues that the role given to education as the dominant ISA is not inherent to capitalism but rather the result of a class struggle which worked to undermine the previously dominant ISA: the church. That the church's role in the reproduction of capitalist logics could be disrupted in this manner highlights that social institutions like education are somewhat autonomous from the needs of capitalism and can be shaped by ideological class struggle. In his terminology, ISAs are part of a 'superstructure' that rests on an economic 'base'. This means that ISAs may diverge from the economic needs of the base *as long as they do not disrupt the core economic functions of the system*. Therefore, ISAs like education can become the site of class struggle as the exploited classes seek to express their own logics within them:

The Ideological State Apparatuses may be not only the *stake*, but also the *site* of class struggle, and often of bitter forms of class struggle. The class (or class alliance) in power cannot lay down the law in the ISAs as easily as it can in the (repressive) State apparatus, not only because the former ruling classes are able to retain strong positions there for a long time, but also because the resistance of the exploited classes is able to find means and

occasions to express itself there, either by the utilization of their contradictions, or by conquering combat positions in them in struggle (Althusser, 1971: p. 147, original emphasis).

In Althusser's thought then, education plays a central role as both a site for the legitimation of ruling class domination and of class struggle. He thus places education at the centre of processes that are integral to understanding the ongoing reproduction of capitalist society.

The argument that education serves to reproduce capitalism is also present in the work of other education scholars (Warmington, 2015). Perhaps the most famous work on America in this vein is Bowles and Gintis' *Schooling in Capitalist America* (1976). In this book, Bowles and Gintis review the history of American schooling and make the argument that it can be best understood through its correspondence with the interests of the powerful. Bowles and Gintis recount how systems of mass education in the United States have been designed to create the type of workers needed for capitalist production. They highlight that public schooling emerged hand-in-hand with the desire of factory owners for a better trained workforce. According to Bowles and Gintis, this correspondence has continued throughout the history of the United States. In a more recent example, they argue that efforts to provide greater access to higher education for non-elite populations was twinned with a new focus on vocational education in institutions of higher learning, thereby continuing the creation of a stratified workforce. For Bowles and Gintis, the way to understand education is therefore to focus on the needs of capital.

Writing at around the same time as Bowles and Gintis, Bourdieu and Passeron (1977) viewed education as a central means through which class is reproduced, presenting another connection between schools and the reproduction of the capitalist system. To Bourdieu and Passeron all schooling, or what they refer to as pedagogic action, is an act of 'symbolic violence'

whereby the culturally dominant ideology is imposed. This is accomplished through ‘channelling and streaming’ students into different categories, with the most prestigious categories reflecting the values of the upper and middle classes. By turning class values into educational credentials, the education system works to perpetuate the class system. As they write:

the School has both a technical function of producing and attesting capacities and a social function of conserving power and privileges, it can be seen that modern societies furnish the educational system with vastly increased opportunities to exercise its power of transmuting social advantages into academic advantages, themselves convertible into social advantages, because they allow it to present academic, hence implicitly social requirements as technical prerequisites for the exercise of an occupation (Bourdieu and Passeron, 1977: p. 166-7).

In contrast to Bowles and Gintis, Bourdieu and Passeron were not focused on the direct correspondence of schooling to the needs of production but rather on its role as a system through which class advantages are reproduced (Ball, 2005; Morrow and Torres, 1995). However, common to both was a focus on how institutions of schooling are closely tied to the reproduction of the capitalist system. Combined with the work of Althusser (1971) then, both sets of authors made a strong argument for studying schooling through examining the role of schools in reproducing capitalism.

3.2.2 Neo-Marxist and resistance theory

In the 1980s a critique of this singular approach to studying schooling through the needs of capital resulted in a break from reproduction theorists, particularly with the correspondence

theory of Bowles and Gintis.¹³ Attempting to move past the initial work of Bowles and Gintis, neo-Marxists such as Apple, Anyon, and Giroux departed from a strict reading of the correspondence principle and focused more on the ‘relative autonomy’ of education from capitalist domination (Carnoy and Levin, 1985; Gottesman, 2010; Liston, 2015). They did so by exploring the other side of what Giroux terms the dialectic nature of resistance and reproduction (Giroux, 1983: p. 286; see also Carnoy and Levin, 1985) and emphasizing that schools are sites where capitalist social relations are not smoothly reproduced but rather struggled over. This focus on resistance was an explicit reaction to the work of reproduction theorists, with Giroux writing that with “its grimly mechanistic and overly-determined model of socialization there appears little room for developing a theory of schooling that takes seriously the notions of culture, resistance, and mediation” (Giroux: 1983: p. 266). Apple (1988) was more generous, writing that his focus on resistance was made possible because Bowles and Gintis’s work began a discussion on the roles that schools play under capitalism. Nevertheless, the 1980s saw a break from reproduction theory in ways that complicated the narrative of education as a system solely geared towards fulfilling the needs of capital.

Although published only a year after *Schooling in Capitalist America, Learning to Labour* by Willis (1977) is often viewed as originating the focus on resistance within the Marxist sociology of education (Carnoy and Levin, 1985; McGrew, 2011; Phillips, 2014). Unlike Bowles

¹³ It should be noted that this critique is often overstated. Indeed, Bowles and Gintis’ work is not as deterministic as often characterized (Au, 2006). Like Althusser, Bowles and Gintis see a dual role for education under capitalism: producing the labour needed for capitalist accumulation on the one hand and promoting social control through the veil of the meritocratic ideal on the other. This makes schooling an important area of struggle for all classes as they seek leverage over the system in order to improve the social mobility of their children. While Bowles and Gintis focus on the correspondence principle, they acknowledge this second role for education and write “the independent internal dynamics of the two systems present the ever-present possibility of a significant mismatch arising between economy and education” (1976, p. 236). Thus, while they privilege education’s correspondence with the needs of capital, they are not blind to the possibility of divergence.

and Gintis, Willis did not focus on the question of how schooling institutions reproduced class power but instead on the ideological work that the school does at the level of the individual student. As Willis (1977: p. 1) writes: “The difficult thing to explain about how middle class kids get middle class jobs is why others let them. The difficult thing to explain about how working class kids get working class jobs is why they let themselves.” From this vantage point Willis did not examine the school as a factory churning out workers but, as Arnowitz writes in the introduction to a reissue of *Learning to Labour*, as a battlefield where the “the social and technical division of labor is reproduced through contradiction and conflict” (1981: xii). Willis illustrates this through examining how working class boys drew on alternative ideologies of masculinity for their sense of self-worth and thereby rejected the ideology pushed by their teachers. This meant that the reproduction of capitalism was secured not through a smooth process but a contested one.

Following Willis, scholars in education began to focus on the contestation of dominant logics in schools rather than their reproduction, asking, as Apple (2002) did, “whether education *itself* can have independent or at least relatively autonomous effects on society” (p. 612, original emphasis). Rather than taking the reproduction of capitalist logics as assured, this work focused on how institutions of schooling can at times push back against a narrow correspondence with the needs of capital (Gottesman, 2010). According to Apple (1988), this was necessary because Bowles and Gintis failed to take into account that “most institutions not only came about because of conflict, but are continuously riven by conflicts today” (p. 120) and that these conflicts are rooted in “genuinely contradictory elements in schools” (p. 124). Dale (2009) provides a useful summary of these contradictory elements, arguing that schooling systems must serve three core roles under capitalism: (1) producing a skilled labour force as an input into capital accumulation

and economic development, (2) creating social cohesion and order through instilling ideologies, and (3) providing a supposedly legitimate method of streaming children into social classes that can be used to justify the inequality of capitalism. As Dale argues the tensions between these roles often erupt into a conflict that complicates pictures of narrow correspondence and, as resistance scholars point out, this opens up room for resistance to shape institutions of schooling.

While Dale's three elements are a useful frame, it should be noted that not all scholars agree on them or view them as the core contradictions of schooling. For example, Carnoy and Levin (1985: p. 144) argued that, in the American case, conflict over education is built around two elements:

On the one hand, schools reproduce the unequal, hierarchical relations of the capitalist workplace; on the other, schooling represents the primary force in the United States for expanding economic opportunity for subordinate groups and the extension of democratic rights... These forces are in structural opposition, creating contradictions – i.e. conflicts and internal incompatibilities – in education that result in a continuing struggle over direction.

Nevertheless, despite disagreements on the precise nature of the conflictual pressures on education, by highlighting how contradictory forces shape conflict over schooling, resistance scholars pushed beyond a simple notion of correspondence between schools and capital. This brought about a focus scholarship tracing how resistance and conflict shape systems of schooling.

Accelerating this break from reproduction theories of education, other scholars argued for the emancipatory potential of education in producing an anti-capitalist politics. Drawing on the work of Freire (1972), scholars like Giroux (1983) argued that a radical approach to education

could help unmask the relations of domination which kept the working class oppressed; or, as Freire wrote, help to “transcend the naïveté which allows itself to be deceived by appearances” (1972: p. 174; see also Murray and Liston, 2015). Instead of concentrating on how schooling functions under capitalism, these scholars worked to imagine a different type of specifically anti-capitalist schooling. In doing so, they furthered the break from reproduction theories in the sociology of education and helped to open the ‘black box’ of the actual practice of teaching.

This opening of the ‘black box’ through a focus on pedagogical practices further problematized narrow depictions of the function of schooling and education. For instance, Arnot (2002) importantly points out that reproduction theories relied on a view of the school as an internally coherent institution rather than as a porous one. This has meant that theorists using these approaches failed to consider how schools interact with other social relations that can have a profound effect on students’ orientations towards schooling, such as family and peers. Collins (2009) makes the same point, further arguing that in cases where the household has a different ideology than that being proposed by schooling, we can understand social reproduction more closely at the family level. As these scholars have argued, examining schools as just one of many sites where reproduction occurs disrupts the notion of education as a system whereby capitalism is easily reproduced. The fact that schools must react to the needs and dispositions of their pupils as well the demands of their parents opens possibilities for resistance that cannot be seen through a narrow focus on schools as sites that must respond solely to the demands of capital (see also Apple, 2015; Carnoy and Levin, 1985).

Furthermore, scholars have emphasized that capitalist logics are far from the only ones reproduced within schools. As the Centre for Contemporary Cultural Studies (CCCS) argued in the early 1980s, this narrow focus on reproduction and resistance of capitalism within education

hid the fact that education systems also served to reproduce patriarchal relations that were an important element in shaping the schooling system — notably through channelling male and female students into different professions or through emphasizing the role of women as homemakers (Baron et al., 1981). Since that time much of the post-Bowles and Gintis work in the neo-Marxist sociology of education in the United States has focused understanding the ways in which patriarchy, white supremacy, and other systems of oppression are reproduced through the schooling system. For example, Leonardo (2012) calls for a critical raceclass theory of education that acknowledges the importance of capitalist system of production in shaping schools without placing race or racism as a secondary phenomenon. Likewise, Dumas (2011) has argued that race is always classed, and class always raced, and therefore the two must be understood as always connected and articulated to one another.

An important aspect of much of this work is in emphasizing the ways that schooling, as a site of social reproduction, has played an integral role in the feminist and civil rights movements. This work has therefore focused on how we can understand the sometimes-progressive role of schools as sites of resistance within the greater context of capitalism, patriarchy, and white supremacy (Apple, 2015; Arnot, 2002). While acknowledging that the potential of schools to transcend these structures is limited, scholarship has focused on how schools have been a crucial site of disjuncture that opens cracks for resistance. As Arnot (2002: p. 12) writes when discussing education's role in increasing the professional credentials held by women:

Schools as institutions have played a key role in challenging the gendered curriculum and traditional female pathways into social-class destinations... yet at the same time the pattern of sex segregation in the labour market has not only been sustained but, in some cases, it has been even more divisive and oppressive to women than previously. Considerable

tension now exists between female aspirations for autonomy and personal freedom and the reality of their material circumstances.

In this example, struggles within schooling have met with success in changing the school as an institution but have not changed the corresponding institutions of workplaces. This highlights a contradiction between a (relatively) more egalitarian system of schooling and the patriarchal world of labour and therefore possibilities for struggles within schooling to push outwards.

Common to the studies of resistance scholars reviewed above then, is a move beyond a narrow focus on the needs of capital. Rather they have highlighted how the contradictory pressures on schools cause conflict with, and sometimes outright resistance to, the reproduction of the capitalist system. For example, the inherent contradiction of placing schools as both the site where students are streamed into a hierarchical labour market and as the site where these hierarchies can supposedly be transcended, marks a tension that can erupt easily erupt into conflict if not managed. By highlighting these contradictions and the conflicts they create, resistance theorists have emphasized the importance of paying attention to the actual practices of schooling.

3.2.3 Correspondence, reproduction, and resistance

The debate between reproduction theories and those focusing on resistance has largely faded from view within the modern sociology of education, with the discipline moving away from studying the correspondence between education and capitalism. Despite recent calls to reconceptualise the relationship between reproduction and resistance (Au, 2006; Gottesman, 2010; McGrew, 2011), the debates of the 70s and 80s have continued to exist in what De Lissovoy (2008: p. 934) calls a ‘stale truce’ with (some) orthodox Marxists engaging in separate

debates from the rest of the field while resistance scholarship continues to be an important field of study (McGrew, 2011).

However, recently scholars like Au (2006), McGrew (2011), and Gottesman (2013) have attempted to reclaim the work of authors such as Bowles and Gintis by arguing that resistance scholars should not be thought of as overturning work focusing on reproduction but instead as exploring the other side of a dialectic between reproduction and resistance; to these authors rather than being completely opposed, forces of reproduction and resistance should be understood as in dialectical tension. Carnoy and Levin (1985: p. 4) argued the same thirty years ago, writing that "the relationship between education and work is dialectical—composed of a perpetual tension between two dynamics, the imperatives of capitalism and those of democracy in all its forms." As will be explored in the next section, the methods of balancing this tension is not fixed but, instead, plays out differently across contexts; for as Carnoy and Levin (1985: p. 5) continue: "A dialectical relation is one that is characterized by change; it represents a social form that is always coming into being; it changes according to the phase of the underlying conflict."

3.3 State schooling systems and the educational settlement

The review of the relationship between education and larger sociological processes above has emphasized the contradictory pressures on schooling systems. While unflattering descriptions of correspondence theory suggest that we can understand schooling simply through its correspondence with the needs of capital, most scholars from Althusser to resistance theorists have emphasized that institutions of schooling must balance competing pressures. This means that the nature of schooling from context to context is likely to be the result of how these competing agendas interact with the politics of a place and the ways in which capitalism functions in different societies; indeed, as Bonal (2003) argues, the ways in which state

education systems respond to these pressures can vary significantly in different national contexts. It is with this in mind that this section explores what Baron et al. (1981: p. 31) refer to as the ‘educational settlement’ whereby a “dominant alliance of forces, and a more widespread recruitment of popular support or inducement of popular indifference” are able to produce a stable compromise between competing agendas for schooling.

Following from the earlier review it can be understood that, at a minimum, institutions of schooling in the United States and other advanced capitalist countries must balance the needs of capitalism to both produce workers and to legitimize how these workers are streamed into social classes. Indeed, as outlined above the scholarship of the 1970s was focused almost exclusively on these roles, debating whether they entirely shaped education systems or if there was room for resistance within the practice of schooling. Lost in this polarized view was, as Morrow and Torres (1996) point out, the role of the state as the governing body through which schooling agendas are formed and contested (see also Carnoy and Levin, 1985). For them, without focusing the state as a mediator of conflict it is impossible to capture the specificities through which education policies are formed. Indeed, as Dale writes (2009: p. 22-23), understanding the state’s role in shaping how competing agendas are balanced is essential to understanding schooling:

the fundamental key to understanding education systems lies in recognising their relationship to the core problems of capitalism, that it cannot itself solve and that it needs an institution like the state to provide... I have always argued that the solutions to these problems were as likely to be mutually contradictory as mutually complementary... and that attempts to resolve these contradictions lay at the heart of education policy.

The conflicts discussed by resistance theories therefore cannot be understood as only taking place within institutions of schooling but must instead must situate these institutions within their

context as extensions of the state. This means that any understanding of educational policy must include a focus on how the conflictual pressures within education play out in conflicts over the role of the state.

The Centre for Contemporary Cultural Studies (CCCS) and their book *Unpopular Education* provides an example of how the study of schooling can take the role of the state into account. In tracing the evolution of English education policy from 1944 to 1980, the CCCS utilized a Gramscian analysis to examine how education policies have changed to accommodate different methods of balancing competing agendas for public education. This included the important point that understanding the needs of capital is far from straightforward given that different types of capital have varied requirements for schooling. Furthermore, the CCCS argued that the needs of capital are an important, but incomplete, way to understand schooling. They did so based on the argument that the relationship between families and schools as well as the power of teachers' unions are important elements shaping schooling systems. Taking these competing demands into account, the CCCS argued that state education systems develop 'educational settlements' whereby relations between these interests become temporarily stabilized; as they write:

the term 'educational settlement'... [refers] to the balance of forces in and over schooling. Settlements entail, at this 'regional' rather than 'global' level, some more or less enduring set of solutions to capital's educational needs, the putting together of a dominant alliance of forces, and a more widespread recruitment of popular support or inducement of popular indifference (1981: p. 32).

The CCCS illustrated this concept by examining how the English schooling system cycled through different settlements over several decades. This included a post-war settlement on a

tiered public education system with strict standards, followed by the expansion of access in the 1960s, and, finally, the neoliberal educational settlement that they saw emerging at the time of their writing. In doing so, they illustrated how education policies reflected the wider balance of power within the state and how this placed different demands on schooling.

Carnoy and Levin (1985) undertook a similar analysis of education policy in the United States, arguing that changes in schooling can best be understood through the overall balance of power between social movements and capital. For them the dialectic between reproduction and resistance plays out through state institutions, with capital reworking the state at moments when it is strong and social movements pushing for democratic equality at moments when they have power. Carnoy and Levin (1985) explicitly ground their work in opposition to the education scholarship of the 70s which they characterize as viewing the state as an empty shell or as a monolithic block captured by capital, writing:

Schools are conservative institutions. In the absence of external pressures for change, they tend to preserve existing social relations. But external pressures for change constantly impinge on schools even in the form of popular tastes. In historical periods when social movements are weak and business ideology is strong, schools tend to strengthen their function of reproducing workers for capitalist workplace relations and the unequal division of labor. When social movements arise to challenge these relations, schools move in the other direction to equalize opportunity and expand human rights (p. 285).

In their book, *Schooling and Work in the Democratic State*, Carnoy and Levin illustrate how the democratic aspects of schooling have been strongest in periods where social movements are active such as during the civil rights era and weakest in times where capital is powerful such as prior to the Great Depression and during the Reagan era. Unlike Apple and Giroux's early work,

Carnoy and Levin argue that schooling is not the site where resistance is formed but is a secondary site of struggle in wider social movements. Regardless, like the CCSS, Carnoy and Levin (1985) argue that it is essential to understand the balance of power within the state to understand the functioning of school systems.

Morrow and Torres (1996), writing across contexts, also focus on the state as a site of articulation between the needs of production, social reproduction, and resistance. Rather than simply focusing on the school (and the friction between schooling and family culture) or on the macrostructures of capitalism, they instead argue for a more open understanding of how state-led policy may differentially manage the tensions inherent to capitalist schooling:

in advanced capitalist societies, and developing ones that successfully confront the imperatives for sustained development, *the key to a theory of educational reproduction lies in a theory of public policy that can analyze educational policy formation in specific, empirical terms*, thus mediating between the abstraction of general societal processes, or a microanalysis of conflicts within educational system (Morrow and Torres, 1996: p. 343, original emphasis)

To Morrow and Torres the struggle over schooling's contradictory roles under capitalism can only be understood in relation to struggles over educational policies that are conjunctural in nature. Bonal (2003), writing about Spain's position in the semi-periphery, extends Morrow and Torres' point; he argues that as institutions of schooling evolve in the face of legitimation crises, they do so in ways that are shaped their national context. For example, in Spain the neoliberalization of schooling has played out differently than in the Anglo-American sphere due to the strong position of the Catholic Church and a relatively weak discourse of schools as the means of achieving social mobility (Bonal, 2003). This has meant that neoliberal reforms over

schooling that seem similar at a distance can vary in reality — with the Spanish state’s attempt to manage the competing forces of education reformers and the Catholic Church leading to a different sort of ‘educational settlement.’ Therefore, if the state acts as a site for social struggles over education, the nature of that struggle changes from place to place in a manner that fits within each state’s attempts to balance capitalism’s contradictions.

The work of the CCCS (1981), Carnoy and Levin (1985), and Morrow and Torres (1996) all help to expand upon the dialectic of reproduction and resistance found in the early work of Apple and Giroux. They do so by extending the dialectic into the functioning of the state and exploring how the state acts as what Carnoy and Levin (1985) refer to as a strategic battlefield for any crisis in capitalist schooling. Furthermore, what the CCCS (1981), Morrow and Torres (1995), and Bonal (2003) illustrate through their empirical work is that these struggles over state institutions are conjunctural in nature and coalesce into national ‘educational settlements’ whereby the dialectic between resistance and reproduction is temporarily stabilized. Struggles over and within the state are therefore not determined by the needs of capital (as narrow representations of correspondence theory suggest) nor are they internal to the practice of schooling (as narrow readings of resistance theory would suggest) — instead, they are shaped by the specific, conjunctural politics of schooling as reflected in state-based education systems. While these authors were writing at the beginning of the neoliberalization of schooling, they can provide a roadmap for how to understand the neoliberal ‘educational settlement’ and how it attempts to balance the contradictory demands on schooling outlined by Dale (2009) and others.

3.4 Neoliberalism and the educational settlement

Given the important role of the state in balancing the tensions inherent to schooling in advanced capitalist societies, any attempt to understand the present day educational settlement must be

attuned to how the state has changed over the past several decades. This means an attention to how processes of neoliberalization have drastically remade schooling policies through a combination of austerity politics and market rule. While the ways in neoliberalization has occurred within schooling is the result of politics specific to the education sector, the broader political movement away from the state delivery of public services and towards maximizing economic competitiveness is common across most state institutions. As such, in this section I will examine how processes of neoliberalization have pushed towards a new educational settlement in the United States. This is presented in three sections: (1) a brief review of the concept of neoliberalism; (2) a discussion of the shape of neoliberal education policies; and, (3) some preliminary thoughts on the emerging neoliberal educational settlement.

3.4.1 Neoliberalization and education

A detailed review of neoliberalism and neoliberalization is outside of the scope of this chapter. However, it is important to be clear about the understanding of neoliberalism used in this dissertation. This is because the term is often used without attaching a clear meaning to the concept or portrayed simplistically as the dismantling of the Keynesian welfare state without regard to how neoliberal policies build new systems of governance (Peck and Tickell, 2002). For clarity's sake, and following Peck (2010), I use the term neoliberalization to denote the process through which market forms have been created and expanded through state restructuring. According to Brenner, Peck and Theodore (2010), this spread of market forms is the core of neoliberalism. As they write: "whatever the differences among them... all prevalent uses of the notion of neoliberalism involve references to the tendential extension of market-based competition and commodification processes into previously insulated realms of political-economic life" (p. 326). Importantly however, Brenner, Peck, and Theodore emphasize that this

is not a pre-ordained process whereby all states will end up with the same, neoliberal, governance structure, but rather a variegated process where the neoliberal tendency towards market rule interacts with existing regulatory and social landscapes. This means that the shape that neoliberal policies take is always hybrid, a mix of ideological state restructuring in the image of a market and of existing political and social structures.

This hybridity is important in understanding the way that the educational settlement in the United States has been shifted through processes of neoliberalization. As scholars like Carnoy and Levin (1985) and Morrow and Torres (1996) have written, the politics of schooling are always connected to struggles over the state, and conflicts over neoliberalization are no exception. As will be explored in Chapter 4, over the past several decades American institutions of schooling have been increasingly remade in the image of an idealized market and this has resulted in fundamental changes to the way that schooling is governed (Apple, 2001). Importantly, the precise nature of these changes can best be understood through examining how processes of neoliberalization have, in the manner discussed by Brenner, Peck, and Theodore (2010), resulted in new, hybrid forms. Because neoliberal education policies, like past educational settlements, must find a balance between the needs of capital and the social demands placed upon schools, the form through which these needs are balanced has become the subject of conflict over institutions of schooling.

Of course, this conflict over schools is a process still very much in motion. While settlements are never complete in their effects, this is particularly true for the expansion of market-rule given that the majority of students in the United States are still educated at their neighbourhood school. Nevertheless, it is possible to examine whether the contradictory pressures on schooling in the United States are in tension with emerging neoliberal, market

forms such as charter schools. Therefore, in the sections that follow I will explore processes of neoliberalization in American schooling in order to understand how these new governance structures are forming and whether they are managing to form a new educational settlement. To do so I will begin by discussing the ways that neoliberalization marks a departure from the existing educational settlement and then move on to exploring how competing agendas for education have been managed as market rule has expanded.

3.4.2 The emerging, neoliberal educational settlement

Rizvi and Lingard (2009) in examining global trends in education policy have noted that neoliberal states have placed an increasing importance on education as an input into economic competition — especially in comparison to previous educational settlements. Drawing on Labaree, and in a manner similar to Dale (2009), they argue that there are three key ‘educational values’ that schooling systems must balance: (1) democratic equality, or the view that schools are integral to developing a socially cohesive community where everyone’s personal fulfilment is maximized; (2) social mobility, or the view of education as a rivalrous process through which individuals prepare themselves for the labour market and where effort and intelligence is rewarded; and, (3) social efficiency, or the view of education as the means of creating workers who will contribute to economic productivity and the competitiveness of the state. According to Rizvi and Lingard, as globalization has placed states (and regions and cities) in competition with each other for investment, the balance between these values has become increasingly oriented towards social efficiency or education as economic input. This has meant that education reforms have prioritized the role of schools in the economic competitiveness of a nation or a place. As they write,

[the] economistic reframing of education policy has led to an emphasis on policies of education as the production of human capital to ensure the competitiveness of the national economy in the global context. In most countries now, economic restructuring has become the metapolicy framing proposals for education policy reform (Rizvi and Lingard, 2009: p. 16).

As they argue, this shift in priorities has meant that education reforms have been geared towards increasing the economic competitiveness of a state rather than focusing on improving social cohesion or increasing social mobility.

Certainly, in the United States the focus on education as a means of economic competition and an associated panic about the state of American schools can clearly be seen. Starting with the Reagan-era report *A Nation at Risk* (1983), the supposed failure of schools has been portrayed as a threat to the future of the country. Indeed, the hyperbolic beginning to the report is clear in this regard, stating: “If an unfriendly foreign power had attempted to impose on America the mediocre educational performance that exists today, we might well have viewed it as an act of war” (p. 7). More recently, the popular 2010 documentary *Waiting for Superman* was promoted with the tag line “the fate of our country won’t be decided on the battlefield. It will be decided in the classroom” while repeatedly emphasizing the danger of China outcompeting the United States in educating children. This overwhelming orientation towards economic competition, a hallmark of the market-based logic of neoliberalism, has been used to justify the reshaping of institutions of schooling, including an increased focus on science, technology, engineering, and math and a de-emphasis on art, music, and humanities (Dimitriadis, 2012). This focus has been enacted through prioritizing the results of standardized tests that are largely oriented towards the sciences. As Dimitriadis (2012) and Rizvi and Lingard (2009) argue,

standardized tests have been used to promote the social efficiency argument in education through a singular attention to how schools can achieve high scores on tests oriented towards the sciences, the results of which are promoted as measuring public education's input into economic competition.

This focus on economic competition in education is important to understanding the disruption of the existing educational settlement because, as Torres (2013) argues, it has enabled a shift in the common sense of schooling so profound as to end the 80-year dominance of what he calls the 'New School' approach to education. In this approach, which is widely associated with Dewey, education is viewed as an integral institution for establishing the well-being of society and for promoting notions of equality and equity. While Torres acknowledges that at no point has a single understanding of education been totally dominant, he argues that the New School's attention to experiential learning, the development of democratic citizens, and to social mobility has been gradually minimized through successive waves of neoliberalization since the 1980s. As it has done so Torres, in a similar manner to Rizvi and Lingard (2009), suggests that education has increasingly been viewed as means of increasing economic competitiveness. However, to Torres (2013), this shift is not limited to viewing education as an input to the competitiveness of nation-states but also to instilling the 'neoliberal common sense' of competition at all levels of the schooling experience. This has taken place through the imposition of market forms and through positioning students in competition with each other as they compete for scarce educational resources (like spots at top universities). Thus the changes to schooling go beyond simple a focus on making public education systems a more efficient input into economic competitiveness but also in instilling the ideology of competition in students.

The growth of markets described in this dissertation's introduction (and further outlined in Chapter 4) has been a large part of the shift towards a neoliberal common sense that Torres highlights. It has also emerged in lock step with the crisis narrative in education, with markets often proposed as the solution to the failings of the public education system and the means through which American education can become more competitive (Lipman, 2011). As described by Scott (2013) and other scholars (Apple, 2001; Gillborn and Youdell, 1999; Lipman, 2011; Pedroni, 2007) this promotion of markets has come at the expense of other educational values. As Scott argues:

Market advocates, in promising that choice will empower local school communities... have rejected the redistribution of resources and opportunity for democratic participation—a right that many early civil rights activists struggled to attain for underserved populations. In addition, the emphasis on choice and individual empowerment neglects the ongoing community and grassroots-based movements for educational equity that continue to emphasize issues of democracy, resource equality, and desegregation (Scott, 2013: p. 65).

Through a crisis narrative and its proposed solution in the creation of markets, there has therefore been a shift in how schooling is viewed and how it is delivered — with ideals of 'democracy, resource equality, and desegregation' deemphasized in the valorization of ideals of competitiveness.

A key element in this shift has been the downloading of the responsibility to the individual or household level. As the quote from Scott (2013) above illustrates, this shift has involved undermining communitarian notions of public education through a focus on the household as ultimately responsible for the success of a child's schooling. Importantly, this has disproportionately placed the burden of managing children's education on often under-resourced

and overworked female caregivers. Given the social construction of such schooling decisions as ‘women’s work,’ this downloading of responsibility places enormous pressures on mothers and other caregivers to act as stewards of their child’s education despite great emotional, physical, and economic cost (Cooper, 2005; 2007; DeSena, 2006; Jabbar et al., 2016; Stambach and David, 2005; Vincent, 2017). Cooper (2005; Wilson, 2015¹⁴), DeSena (2006), Pattillo (2015), and Pedroni (2007) all therefore highlight that the uptake of such burdens does not necessarily mean a belief in the efficacy of markets, but rather is a response to the realities of these caregiver’s lives. As Pattillo (2015: p. 63) writes:

In the absence of an entitlement to quality schools that allows students to “do what they gotta do,” Black parents will of course enter lotteries and line up to secure better schools for their children. They surely display individual agency in doing so. That, however, is not proof of a pro-school-choice politics, but is instead a political critique of how the state is currently falling short of these parents’ visions of educational opportunity and equity.

Thus, while communitarian politics are undercut through the instilling of competitive pressures, households are required to take on a heavier load as the added responsibility of navigating school choices is placed upon them. This, perhaps, signals that the removal of alternative ideologies around education are not destroyed by the roll out of market forms, but, instead, that parents “do what they gotta do” in order to ensure their child’s success in an increasingly competition-oriented system. Importantly, as Pattillo argues, this does not mean parents lack agency in making these decisions, but rather that this agency is exercised within the constraints of the circumstances of these parent’s lives.

¹⁴ Cooper and Wilson are the same author (post name change).

Therefore, despite Rizvi and Lingard's (2009) and Torres (2013) description of a shift in educational common sense and the growth in a narrative of personal responsibility, it may be premature to write off the importance of liberal values of schooling such as democratic equality and social mobility. Beyond research at the household level which suggests the incompleteness of the spread of neoliberal ideology, Warmington (2015) has also argued that as social inequality has grown and as the social safety net has been scaled back, the legitimization function of education has only increased in importance. According to Warmington, the myth of social mobility through a meritocratic system of education is integral to justifying the increasingly unequal distribution of wealth in an era of drastic social cutbacks (see also Imbroscio, 2016; Kantor and Lowe, 2006). This is because the meritocratic ideal in education allows for a supposed solution to inequality that does not require the redistribution of wealth or a dramatic increase in state spending. This makes it a popular solution for austerity-oriented regimes, with Warmington going so far as to refer to education as the "crisis strategy of the 1%" (p. 296) and Imbroscio (2016: p 183) calling education "the quintessential (and most fundamental) instrument of [the meritocratic] paradigm." The strength and importance of this narrative can clearly be seen in the comments of Arne Duncan and Donald Trump quoted in this dissertation's introduction as well as in this chapter's epigraphs where education is referred to as 'civil rights issue of our time' and as the 'only means to escape poverty.' Similarly, in the UK context, Tony Blair used Labour's education policy as a means of avoiding challenges to his regime's neoliberal agenda, stating:

to those who say where is Labour's passion for social justice, I say education is social justice. Education is liberty. Education is opportunity (quoted in Gillborn and Youdell, 1999: p. 19).

Through this discursive move (which can also be seen in the statements of philanthropists supporting education [Cohen and Lizotte, 2015]), alternative pathways to social justice are precluded by the supposed ability of education to address systemic inequalities (Kantor and Lowe, 2006). While the efficacy of this approach can certainly be debated, it is clear that despite its repositioning under neoliberalism, education has played an important role in efforts to legitimate state austerity.

Whether the importance given to education as a means of social mobility is enough to preserve alternative educational values is not clear. Statements like those by Blair, Duncan, and Trump may be an entirely discursive move, rather than one that opens possibilities for resistance. There are indeed reasons to doubt that non-economic values in schooling can be protected, especially due to the devolution of state control over schooling to private hands. Given that many schools in the United States are now operated by non-state actors, the governance of schooling has become increasingly insulated from the effects of public debate. Furthermore, even within the publicly-operated system, a rise in outsourcing has increased private control over core activities of schooling such as curriculum development and teacher training (Burch, 2009). These changes have lessened the role of the state as a mediator of educational conflict and helped to place decision-making power over education in private hands. In this light, even if groups are able to put pressure on state schooling institutions to enact progressive policies, the ability of the state to influence the education system as a whole may have been lessened.

It is this context of decreased state control and the increased power of private capital over schooling that has led some education scholars to question whether consent is even needed for education reforms in a neoliberal context. For instance, De Lissovoy (2013) asks whether we can still use the Gramscian notion of consent to understand education given the use of high-stakes

testing, performance measures, and competitive incentives to coerce teachers and students to act in alignment with the view of education as a competitive endeavour. As he writes:

It may be, in this era of hyper-testing, performance indexes and benchmarks, that the manufacture of consent in schooling (the traditional formula for ideological hegemony) is less important than the continuous submission to assessment and monitoring that is demanded of students and teachers alike. In a society in which the market has already effectively instituted itself as the inner and essential meaning, and in which ever more of the subject's potentialities are mined and reorganized within its logic, it is no longer as important to inculcate a particular mindset; instead, the point is to ever more continuously organize and *verify* the subject as the effect or property of control (assessment) itself (De Lissovoy, 2013: p. 428, original emphasis).

De Lissovoy therefore argues that the combination of technologies of assessment with market forms of schooling has resulted in a situation where coercion rather than consent is the primary method of education reform. If this is the case, then the ability of teachers, parents, and social movements to mitigate the effects of business-and-market oriented reforms may be limited — to say nothing of the potential to construct alternatives.

Lipman (2013) comes to a similar conclusion to De Lissovoy but makes the argument that the use of coercion in education is highly uneven rather than universal across the schooling system. While Lipman concurs that the disciplining power of assessment regimes acts as a coercive force, she states that it is specifically targeted at low-income, racialized communities. She writes that in majority Black cities in the United States attempts to generate consent for education policies are almost non-existent and that state politicians and mayors have used crisis narratives and state takeovers to impose market rule and austerity governance. Following this

imposition of state power, schooling systems are then aligned to the desires of business leaders — for instance, the enabling processes of gentrification through school closures (see Chapter 6). This use of coercive state power rather than consent is justified through test results which mark majority African-American and Latinx school districts as failures. Importantly, Lipman (2013) makes the point that this system of coercion is predicated on a broader consent to market reform outside of these communities which provides tacit support for state takeovers or mayoral control. As such, consent and coercion are highly uneven, with different groups targeted for one or the other. As argued above this has meant that certain populations, most notably women of colour, are put in situations where school choice is a matter of preserving their children's future in the face of a dismantled public school system (Cooper 2005; 2007; Pattillo, 2015).

In making this argument Lipman signals to the work of Apple (2001) who has traced how a careful alliance of evangelical Christians and neoliberal market reformers have reshaped American schooling. As Apple (2001) writes, this alliance has been made possible through a discursive shift around what democratic schooling means. While previously democracy in schooling was viewed as residing in collective decision-making processes, neoconservative and neoliberal groups, including a strongly-organized home schooling community, have promoted the notion that personal choice in a market is the purest notion of democratic schooling (see also Cohen and Lizotte, 2015). This shift has been enthusiastically received by both neoliberals who believe in the efficiency of markets and by neoconservatives and evangelical Christians who wish to limit state control over their children's education. Given the consent of these groups, it is therefore inaccurate to state that coercion dominates education policy but rather that, as Lipman (2013) writes, its use is specifically targeted. Furthermore, even amongst communities targeted

for coercion there is often a level of consent as community leaders are enrolled in participating in market-making efforts (Cohen and Lizotte, 2015; Pedroni, 2007).

3.4.3 Stability and contradiction in the neoliberal settlement

When reading across these descriptions of the neoliberal education settlement two things become apparent. First, is that a focus on schooling as an input to economic competitiveness (or social efficiency in Rizvi and Lingard's [2009] terms) has been prioritized over social cohesiveness and democratic control over schools. As Apple (2001) has written, this shift has occurred through an agreement on the importance of market mechanisms in schooling and a scaled-back curriculum focused on the 'basics' like science, technology, engineering, and math. Second, is that these reforms have not only prioritized economic competitiveness but have actively disempowered groups that have traditionally pushed back against a narrow, economic view of the role of education such as teachers' unions. By moving the delivery of schooling outside of direct state control, the strength of resistance efforts from social movements, parents, and teachers has been curtailed, enabling a shift towards market mechanisms and economic competitiveness.

Furthermore, as Jabbar et al. (2016) have argued this shift towards marketization has profoundly changed the nature of not only schooling but of teaching, as the associated dismantling of unions undoes wage protections and job security within the largely feminized profession.

However, the stability of this settlement is not assured, especially given the importance of other roles placed on schooling in the United States. As De Lissovoy (2013), Dimitriadis (2010), and Lipman (2013) have emphasized, outright coercion has often been used to implement market-based education reforms. Such coercion has been enacted through the disciplinary power of a standardized-testing based accountability regime as well as through outright state power targeted at largely African-American and Latinx communities (see Chapter 6 on Detroit). There

are cracks in the potential stability of this settlement however, with a growing anti-test movement and protests against education reforms in places like Chicago perhaps signalling some fragility (Au and Ferrare, 2015).

This fragility should not be overstated, however. Indeed, the neoliberal educational settlement has shown signs of being able to serve its role of legitimating economic inequality and therefore limiting resistance to its roll out. Through an emphasis on the meritocratic ideal in the national narrative and a discursive shift which has made individual choice synonymous with democratic schooling, the public's belief in the connection between education and social mobility continues to show signs of strength. This can not only be seen in the narratives around schooling discussed above, but also in its material practice. For example, one of the best-funded and most well-known charter school chains, the Knowledge is Power Program (KIPP), espouses a 'no excuses' brand of education that wilfully ignores racial and class barriers in the promotion of individual responsibility for a student's own performance. Notably, KIPP requires that parents and students sign a 'Commitment to Excellence' form that emphasizes that poverty is no excuse for failure to achieve high test scores. Their guiding 'Five Pillars' make this explicit, setting "high expectations for academic achievement and conduct that *make no excuses based on the students' backgrounds*" (The Promise of College Completion, 2016: p. 1, emphasis added). Similarly, Eva Moskowitz (2014), the head of New York's largest charter chain, Success Academies, penned an opinion piece that boiled down this ideology to a simple title: 'Schools can help all kids—poverty is no excuse.' As Warmington (2015) argues, the neoliberal settlement on education has attempted to achieve some sort of stability through its emphasis on market-based schooling as the method through which structural barriers can be overcome. This

helps to paint widespread inequality as the result of individual failings rather than systemic problems, stifling dissent against the new educational settlement.

This mobilization of school choice as the solution to poverty, and therefore of an individual's failure to properly exercise choice as the root of failures to achieve social mobility, has helped temper resistance to market-based regimes of schooling (Eastman et al, 2017; Scott, 2013; Sondel, 2015). As Eastman et al. (2017: p. 79) argue:

By shifting the public responsibility to guarantee the civil rights of culturally and linguistically diverse students and those students with special needs to individual consumers—now expected to “shop” for those “services” themselves—the charter model obviates possibilities for social critique.... Not only is the Sisyphean labor that secured the educational civil rights of diverse students rendered invisible, the charter model erodes the foundation on which parents have to stand in making future demands.

This removal of possibilities for critique has been augmented by the mobilization of the language of civil rights to frame school choice as a source of empowerment (Cohen and Lizotte, 2015; Scott, 2009; 2013). While, as Scott (2013) documents, previously the language of civil rights “gave rise to movements fighting for community control, democratic governance, and curricula that represented the histories and cultures of children of color,” this same language is now used to position choice the means through which liberation can be achieved. The displacement of these movement's energies into the exercise of personal choice has therefore bolstered the stability of the neoliberal educational settlement by providing an alternative direction for dissatisfaction. It has also further undermined potential avenues of resistance by requiring that caregivers direct their energies towards navigating the labyrinthine array of school choices on top of their existing burdens, hindering their ability to mobilize towards communitarian

principles (Pattillo, 2015). Importantly however, the ideology of choice and markets does not only work on marginalized communities that bear the brunt of these policies. As Ball (2003) writes, it also matches up with a middle-class habitus which has always viewed education as a competitive endeavor through which their class power can be passed on to the children. This has provided a deep well of support for market-based reforms that helps stabilize these reforms in the presence of any challenges.

The use of education to maintain the neoliberal order, and the hegemony of market-oriented policies, is not limited to K-12 education. As Cottom (2017) documents, in an era of insecure economic futures and intense labour market competition, increased access to post-secondary education and a rising credentialism have also helped displace dissatisfaction with the current order. This is not only achieved through the valorization of elite education as a means of social mobility but also through an increase in for-profit vocational universities which Cottom terms ‘Lower Ed.’ These schools sell a vision of a better economic future that furthers the legitimization function of education without disrupting the new educational settlement. In her words:

Lower Ed encompasses all credential expansion that leverages our faith in education without challenging its market imperatives and that preserves the status quo of race, class, and gender inequalities in education and work. When we offer more credentials in lieu of a stronger social contract, it is Lower Ed. When we ask for social insurance and get workforce training, it is Lower Ed. When we ask for justice and get “opportunity,” it is Lower Ed (Cottom, 2017: p. xxiii).

By offering a ‘shining city on a hill’ these schools continue the narrative that more schooling will offer a way out of poverty by positing that it is a lack of credentials that is responsible for an

individual's poverty; the failure of a high school education to provide an income leads to the solution of requiring further education, presenting an ever-moving target whereby the failure of schooling to solve issues of poverty requires the further continuation of schooling.

This ideological work which promotes the potential of schooling markets in helping alleviate poverty may therefore serve to provide a basis for the neoliberal educational settlement, especially when combined with the coercive power of accountability regimes and the targeted use of state power on those most negatively affected (and therefore most likely to resist). As the rest of this dissertation will explore, the hegemony of this settlement, like all hegemonies, is incomplete but the contours of the neoliberal education settlement can be seen.

3.5 Conclusion

The scholarship reviewed above makes it clear that education serves important roles in processes of societal reproduction and as an input into the economic system. The management of these roles and of the tensions between them have shaped how the state has delivered education in places like the United States. While there are debates between scholars on the extent to which state schooling systems are shaped by the needs of capital, there is little doubt that these systems constitute an important element of social and economic systems regardless of their method of delivery.

This is important because the pressures placed upon schools do not disappear as markets take over their management; indeed, in some respects they have only grow stronger in an area of increased market rule. As Warmington (2015) argues, the roll back of the welfare state has placed more pressure on the education system to serve its function in legitimating economic and social inequality. This is despite the fact that, as Rizvi and Lingard (2009) argue, education is increasingly viewed as an input into economic competitiveness. In the past, such precarious

balances were forged through different state-led educational settlements. However, with the turn to markets and a rise in austerity governance, the ability of states to form such settlements is in doubt. De Lissovoy (2013) and Lipman (2013) therefore argue that we may be seeing a settlement based on coercion rather than consent. Regardless of how these tensions are balanced however, it is likely that they will be manifested within schooling markets, especially as they grow and make up a larger part of the American educational landscape.

The past forty years of debates over the role of schools and schooling in capitalism will therefore be useful in understanding the politics which shape charter school markets. While the models used to deliver schooling may have changed, many of the dynamics shaping schooling have stayed the same. Dale's (2009) three core problems of education (supporting capital accumulation, promoting social cohesion, and legitimating inequality) or, similarly, Rizvi and Lingard's (2009) three values for education (democratic equality, social mobility, and social efficiency) continue to constitute pressures that state schooling systems must address. Part of the challenge in studying schooling markets will therefore be uncovering how and in what form these core problems/values will manifest themselves in the social structures of charter school markets. In relation to the review undertaken in Chapter 2, the question is whether there are tensions between what Torres (2013) refers to as the new neoliberal common sense of markets and these educational values, and how these may play out in and through markets.

Part 1: Conclusion

The chapters in Part 1 of this dissertation present a review of two literatures that are not often put into conversation, but which do have important areas of overlap. Reading the two in tandem has much to offer both groups of scholarship. On the one hand, if the project of studying the functioning of actually-existing markets is to be advanced, then schooling markets and the social dynamics that coalesce within them present a fruitful site for understanding the social underpinnings of how markets function. On the other, as schooling markets grow in scale, understanding the origins and functioning of these markets will be a crucial task for the sociology of education.

The reviews above provide some directions as to the common ground through which these two literatures can be put into conversation. Notably, as neoliberalization has gained strength and markets have grown in both scope and scale, scholars studying both areas have become increasingly interested in market ideology as a hegemonic project. The arguments put forward in Chapter 2 drawing on the work of Block (2011), Burawoy (2003), Fraser (2013; 2014), and Hall (1986) as well as geographic scholarship by Berndt (2015), Christophers (2014b) and Muellerleile (2013) all highlight how the ideology of market efficiency has worked to expand and shape actually-existing markets. Within education, scholars like Lipman (2013), Pedroni (2011), Scott (2013), and Torres (2013) have linked the growth in schooling markets to the same hegemonic project. In seeking to understand how neoliberal common sense shapes actually-existing schooling markets, there is therefore common ground through which the insights into markets outlined in Chapter 2 and into schooling outlined in Chapter 3 can be put into conversation. Through asking how this hegemonic project plays out in schooling and how

resistance to this project is either dissipated or integrated into market forms, both sets of literatures can better grasp the social phenomena they seek to understand.

An editorial penned by Success Academy founder Eva Moskowitz (2014) briefly mentioned in Chapter 3 provides an excellent example of how reading market hegemony and educational values in concert can help us understand the shape of actually-existing charter school markets. In this editorial Moskowitz exhibits a discursive attention to traditional educational values such as social mobility, a true belief in the neoliberal common sense of the market, and a strong emphasis on personal responsibility as the key to success. As she writes:

Many of our Success Academy families face incredible challenges. Some work two jobs, others don't have a job. About 6 percent of our families are homeless.

We have single parents, parents who struggle with difficult economic realities, parents who commute from Staten Island to Harlem — they had to move from Manhattan, but they refused to give up on their child's education....

We as a nation can't fix poverty unless we fix education, and we can't fix education if we keep telling ourselves our schools are "good enough."

If we sell low-income, minority children short, because we believe their poverty prevents them from learning, then indeed, they won't learn.

If we want to help our children of color to rise out of poverty, we must give them schools on par with what their more affluent peers have.

We don't have an achievement gap in America — we have an opportunity gap. With access to great schools, African-American students — indeed, all students — can and do achieve tremendous academic success.

If we give all children a fair start, then the race is theirs to win.

We don't need so much to "lift" children from poverty as to equip them with the skills and self-confidence to achieve their dreams. We must choose to make schools incubators of opportunity, not poverty traps. (2014: para. 19-28)

The narrative above illustrates the ideological work performed to stabilize the neoliberal educational settlement. Moskowitz offers a market-oriented vision which mimics the language of liberation and which offers markets as the method through which the educational value of social mobility can be achieved (Scott, 2013). By commenting on the failures of the existing system, Moskowitz places market-based schooling (specifically charter schools) as a progressive alternative and castigates those who tell themselves that schools are 'good enough.' While these people go unnamed, the reader will be able to identify them as supporters of the traditional public school system, especially teachers' unions.

This denigration of what has come before also helps provide a justification for market-based reforms because, in this view, markets will allow schools like the Success Academies to provide a quality of education that *by themselves* overcome structural barriers and eliminate poverty. Any resulting poverty thereby becomes the result of personal failure rather than that of the education system and certainly not as related to the failure (or retrenchment) of redistributive social systems. The fact that impoverished families and especially female caregivers must sacrifice by commuting across the city while holding multiple jobs is not viewed as a problem inherent to a market system — instead it is presented as an example of the empowering potential of choice. Moskowitz therefore illustrates all sides of the market/schooling coin here: highlighting how the market ideology is mobilized, undertaking the discursive work needed to justify markets as compatible with educational values, and setting up that any failure is the result

of parents who, unlike the parents of her students, have ‘given up’ on their children’s education by not moving cities or commuting hours every day while holding multiple jobs.

Through pairing the study of markets with the study of schooling, this dissertation can help uncover the complex entanglement of market and schooling logics that have been used to create charter school markets across the United States and which are witnessed in Moskowitz’s editorial. In doing so, this dissertation can also help address some of the questions for the geography of markets outlined in Chapter 2. Perhaps most promisingly, it provides an avenue for understanding how struggles within a particular market are linked to circuits of power and the means through which powerful actors can shape the functioning of actually-existing markets. As described above, charter school markets are linked to a general political struggle over the future of American schooling. As such, how these politics shape the functioning of specific markets in Michigan and Oregon can help address questions about the connections between internal market struggles and wider political dynamics. This also helps unlock secondary questions such as Christophers’ (2015) provocative one about why markets remain largely stable in the face of contestation. In both methodological and theoretical terms, charter school markets provide an avenue for studying struggles within markets as well as how they are enmeshed within wider geographies of power.

In regard to the rest of this dissertation. When the methodological and theoretical concerns of both literatures are put together, the broad outline of a framework that can be used to study schooling market emerges. As outlined in Chapter 2, studying any market requires an attention to how these markets are created and struggled over. These struggles cannot be understood in isolation however but, instead, we must study the connections between the struggles within a market and other social dynamics. It is here that the review undertaken in

Chapter 3 is essential. While it is clear that the creation of schooling markets is connected to a broader neoliberalization of the state, many of the factors which drive struggles within charter school markets are likely to be particular to struggles over education. Furthermore, as Bonal (2003) has argued, the way pressures on schooling systems are balanced are likely to be contingent based on the geographic context within which schooling markets emerge. There is a clear case then for studying the geography of struggles over charter school markets as a means of better understanding the marketization of public education. This a methodological imperative as well as a theoretical one, with this dissertation's research design seeking to trace outwards from individual markets to wider relations of power in order to understand how schooling markets function.

Part 2: Markets in Action

The empirical cases outlined in the following chapters highlight different aspects of charter school markets and, in doing so, illustrate how these markets have been shaped by social struggles over their form. Utilizing the framework described in Part 1, in Part 2 of this dissertation I probe the specifics of how charter school markets operate at different scales, from the national circulation of models of market governance to the relationship between charter school markets and racial segregation at the metropolitan level. As such, each case serves as a different ‘window’ into the functioning of charter school markets, illuminating aspects of these markets which are not apparent from the vantage point of the other cases. As a whole, they provide an overview of the different struggles that have shaped the functioning of charter school markets and the ways in which they are embroiled with wider socioeconomic processes, particularly struggles over schooling. At a high level these chapters illustrate the following common arguments: (1) that political contestation has had a key role in shaping how charter school markets function; (2) that the dynamics specific to schooling outlined in Chapter 3 are an important element in these political conflicts; (3) that these struggles have also been shaped by the wider context of the hegemony of market rule; and (4) that space and place have had a key role in the functioning charter school markets and in the conflicts described in points 1 to 3.

Chapter 4, *Continual Circulation: The Mobility/Immobility of Schooling Markets in the United States*, takes the widest viewpoint both geographically and temporally. In this chapter I examine the spread of charter school markets throughout the United States and place this process within the larger historical context of decades of failed attempts to mobilize market-based education policies. In doing so I draw mostly on archival research rather than the place-based research that forms the core of Chapters 5 and 6. By taking a historical view, I illustrate how and

why market-based education reforms were kept immobile during previous educational settlements and the work that was done to make charter schools compatible with the educational values described in Chapter 3. This chapter also charts the uneven spread of charter school policies across different American states, examining the place-based contextual factors that have shaped the mobilization of these policies and/or resistance to their implementation. In Chapter 4 then, the focus is on understanding how charter school markets are enmeshed within the wider circuits of power that are invested in their spread.

Chapter 5, *Conceptions of Control: Libertarian Markets and Local Power*, largely focuses on the state-level emergence of charter school markets. In it I look at how the politics of Michigan and Oregon have resulted in vastly different charter school markets organized around divergent organizing principles: a libertarian ideal of an unrestricted market in Michigan and a focus on local control in Oregon. Having examined how these different principles have been challenged or advanced over time, I then highlight not only the role of struggle in shaping these markets but the uneven terrain upon which this occurs, focusing on the power of capital to shape markets in both states in spite of resistance efforts mobilizing values such as democratic equality and social cohesion. In doing so I illustrate how struggles within markets take place within the wider context of processes of capital accumulation and market hegemony.

Finally, Chapter 6, *Race, Power, and Schooling Markets in Detroit*, takes a close look at how the uneven geography of charter school markets in Detroit is linked to longstanding patterns of racial segregation and the racially-driven use of state power to disenfranchise Black communities. I also trace the connections between the creation of these markets and the wider processes of municipal restructuring and austerity governance that have remade the city. Importantly however, in exploring these connections I argue that charter school markets do not

simply sit on patterns of racial segregation and municipal restructuring but actively reshape them. Through this window, charter school markets in Detroit are shown to be part of this greater program of the remaking of the racial politics of the city, serving as only one example of a long history of the disenfranchisement of the city's Black community. Thus, the emergence of that city's schooling markets is linked to not only the growth of market rule over Detroit's schooling but over its entire social fabric. Unlike the previous two chapters, Chapter 6 focuses only on the Michigan case. This is because the dynamics of urban charter school markets in Oregon are largely covered in Chapter 5 and, given the small footprint of charter schools in Portland (the state's largest city), have a vastly different dynamic than Detroit to the point that comparison would be unhelpful.

Before moving on to these chapters however, it is worthwhile establishing how charter school markets are markets as per the basic definition laid out in Chapter 2: the organization of exchange. It is clear that charter school markets fit this definition. While the price is set, students and charter schools approach schooling as an exchange relation that is structured by the different networks, institutions, and ideas and technologies that make up charter school markets. For students and parents, charter school policies reduce their relationship with a school to simply an individual choice on a marketplace where government funding is exchanged for attendance at a school. While some charter schools may have a deeper relationship with students and their parents, there is no requirement that they do so and, at its most basic level, the exchange of money for schooling structures charter school markets.¹⁵ On the other end of the exchange

¹⁵ In contrast to traditional public schooling which commonly requires that schools have Parent Teacher Associations, school board meetings open to the public, and the election of governing bodies.

relation, charter school operators must recruit students and offer their services in order to gain government funding, without which they cannot exist. In both cases the schooling relationship is boiled down to one process, the choice of where that student will attend school and the exchange of money.

Chapter 4: Continual Circulation: The Mobility of Schooling Markets in the United States

The growth of market-based education policies over the past twenty-five years has so drastically remade schooling systems in places like the United States that, as quoted in the introduction, education scholar Stephen Ball (2012a: p. 89) has gone so far as to call the current moment “the beginning of the end of state education.” These markets have not emerged spontaneously, but instead are the result of policies which have actively redirected public funding from democratically-elected school boards to privately-run schools. This includes charter school markets in the United States, but also the academies program in the United Kingdom and partnership schools in New Zealand. Importantly, the popularity of such policies can be linked to their promotion by different policy networks supportive of market-based reforms. Indeed, as outlined in this chapter, the shape of charter school markets in the United States can partially be understood as the result of how schooling markets-as-policy have been circulated, contested, and continually reshaped by such networks.

With this in mind, in this chapter I discuss how the process of promoting charter school markets has unfolded in the United States, examining how the charter school model was made mobile and then reconstituted in places like Michigan and Oregon. This is accomplished by putting the framework developed in Part One in conversation with concept of policy mobilities, a theoretical and methodological literature that is well-suited to studying the mobilization of policy models like charter schools. Most notably, I do so through two arguments: (1) that the mobility of charter school policies must be understood as only one part of a longer project of promoting market-based schooling reforms; and, (2) that the mobility of charter school models should be

understood as an ongoing process rather than as limited to the time of their initial implementation. Both lines of thought contribute to our understanding of markets as shaped by sociospatial struggles over their form and by the wider context of the hegemony of market rule; highlighting how policies used to create markets are changed through processes of political contestation and through their interaction with place-based contextual factors.

In order to accomplish this task, this chapter will be broken up into five sections: (1) a brief review of the literature on policy mobilities; (2) an overview of the long history of (failed) attempts to mobilize market-based education policies in the United States; (3) a review of how the idea of charter schools became mobile in the 1990s and early 2000s; (4) a discussion of how charter school markets have been continually remade since their establishment; and, (5) some concluding thoughts.

4.1 A brief review: Policy mobilities

The concept of policy mobilities emerged out of critical geographic work which sought to move beyond the fixed conceptions of policy movement found in existing literatures of policy transfer and policy diffusion (McCann, 2011; McCann and Ward, 2012; Peck and Theodore, 2010). In opposition to those literatures' depiction of the movement of policy as the result of rational actors choosing between complete policy packages, the concept of policy mobilities instead focused attention on the power-laden, uneven process through which policies are moved and emphasized the partial nature of this travel. For McCann and Ward (2015), the value of the concept of policy mobilities is in conceptualizing the travel of policy not as an absolute by which we can categorize policies (this policy is mobile, that policy is immobile) but, instead, as a relational process, with 'successful' policies best understood as constructed in relation to 'unsuccessful' policies or the absence of a current policy solution used to justify the presence of

a new one. This relational approach provides scholars with a framework that breaks from simplistic understandings of the movement of policy and draws attention to how the contingent nature of policy movement can have important effects (Baker and Temenos, 2015; McCann, 2011; McCann and Ward, 2015; Peck, 2012b).

Policy mobilities scholarship is therefore less concerned with charting the spread of policies and instead draws attention to the effects of how policies are made mobile. For example, work in policy mobilities has focused on the “informational infrastructure” through which policymakers learn about new policies (conferences, policy tours, etc.) and how this can emphasize certain aspects of a policy while de-emphasizing other aspects (Cook and Ward, 2012; González, 2011). By focusing on what happens to policy knowledge “along the way” (McCann, 2011: p. 217), the concept of policy mobilities allows scholars to incorporate the ways that relationships between jurisdictions and the framing of problems using technological assemblages (such as performance indicators) serve to promote not only specific policies, but specific understandings of those policies. For example, Ward’s (2006) study of the introduction of Business Improvement Districts (BIDs) to the United Kingdom emphasizes the particular role that the case of New York and its focus on “broken windows”-style aesthetic improvements had in shaping the UK’s BID policy.

By opening up the ‘black box’ of how policies are changed as they are moved between places, the policy mobilities literature emphasizes that seemingly-similar policies vary as they interact with the place-specific politics and institutions that do the hard work of implementation. This is true even of highly mobile policies promoted by powerful actors as local institutional contexts shape how policies are understood and implemented (Baker et al., 2016; Peck and Theodore, 2015). As Baker et al. (2016: p. 463) write, this variegation and duality define the

policy mobilities approach with its assertion that “policies are not generated abstractly in ‘deterritorialized’ networks of experts, rather, they emerge in and through concrete ‘local’ situations that constitute wider networks.” As policy mobilities scholarship helps us understand then, the ongoing power of neoliberal policies such as charter schools has not meant a process of homogenization but, as will be argued in this chapter, a series of mutations as the ‘deterritorialized’ and the ‘local’ interact to create new hybrid forms. Thus, as Peck and Theodore (2015: p. 18) argue, “policies may be crossing borders ever more “freely,” but this does not beckon a flat earth of standardized outcomes or some socioinstitutional monoculture.”

With respect to markets, this conception of policy mobilities is important because policies, and the networks that move them, are a crucial site of struggle over the shapes that many markets take. For example, Lai (2011) examines the networks used to develop the policies establishing China’s financial markets, highlighting how Western experts clashed with Chinese bankers over the construction of these markets and how this resulted in a new, hybrid form. This means that the methods through which models of regulation or new market institutions are promoted by different actors are likely to have a strong effect on how markets operate, especially in the case of newly constructed markets (such as charter school markets). How charter school policies have been mobilized by different actors and how local political struggles have shaped their implementation are therefore central to understanding the forms that charter school markets take in different states. For this reason, the history of how charter school markets have been promoted throughout the United States is an essential element in understanding the way these markets function.

4.2 School choice in the United States pre-1991

The intellectual and political roots of markets for publicly-funded schooling such as charter school markets have a long and complicated history. Most famously associated with public-choice theory and one of the founding fathers of neoliberalism, Milton Friedman (Dougherty and Sostre, 1992; Henig, 1995), the idea of ‘choice’¹⁶ in education also has roots in religious, class, and racial conflicts over schooling; indeed, choice and markets have at various times in American history been viewed as promoting different elements of the contradictory educational values discussed by Dale (2009) and Rizvi and Lingard (2009). This has meant that efforts to promote the market-based delivery of schooling have not only been driven by the ideology of market efficiency but at times by efforts to maintain racial segregation or to prevent marginalized communities from gaining control over schooling. This checkered history is important to explore, because the legacies of these failed attempts continue to manifest themselves in market-based schooling policies today (Forman, 2004; Henig, 1995; Ryan, 2004). Furthermore, it is important to understand how and why policies fail to travel if we want to uncover the conditions that allow similar policies to be successfully mobilized (McCann and Ward, 2015; Temenos and McCann, 2013); that is, through focusing on why school choice policies failed to become popular prior to the 1990s we can better understand the emergence of charter school markets over the last twenty-five years.

While Beadie (2008) notes that markets for private schooling in the United States date back to the late-1700s and early-1800s, the use of markets as a means of allocating *public* money

¹⁶ Market-oriented education policies are often grouped together under the terminology of school choice, which refers to the ability of parents and students to ‘choose’ their school in a marketplace.

first came to the fore in the 1950s. Importantly however, this emergence was shaped by legal and political debates over the constitutionality of religious schooling that far predate the first proposal for the market-based delivery of publicly-funded schooling. These legal battles began in the 1800s when Catholic (parochial) schools gained popularity as an alternative to the Protestant-dominated public system. This popularity unleashed a counterreaction as Protestant supporters of the public system sought to prohibit government funding of religious schools (Viteritti, 1998). At the federal level, Maine Congressman James Blaine introduced an unabashedly anti-Catholic amendment to Congress in 1875 which aimed to prohibit state funding of religious schools. While the legislation ultimately failed, state-level iterations of the ‘Blaine Amendment’ were adopted in 29 states by 1890. These amendments cemented the close connection between government *control* of schooling and government *funding* of schooling (Viteritti, 1998).

The counter-reaction to Catholic schooling continued into the next century and reached a crescendo in Oregon in 1922 when the Ku Klux Klan and other groups helped pass legislation that made private schooling illegal regardless of the source of funding. They did so based on the argument that public schooling was needed to ‘Americanize’ the children of immigrants (Minow, 2011; Viteritti, 1998). Importantly, this legislation was ultimately ruled unconstitutional by the Supreme Court in 1925. Through this ruling however, the court affirmed the right of parents to use the private system to send their children to the school of their choice. The Supreme Court’s decision therefore did not disrupt the agreement that public money should be restricted to publicly-run schools, but did establish the right to private schooling as a touchstone of the American education system (Minow, 2011; Viteritti, 1998). These two principles, public funding for public schools and the right to pay for private schooling, characterized a general agreement

on the nature of schooling in America for the following decades and therefore the landscape that market-based reforms unfolded within.

It was in the 1950s that school choice as a means of breaking up government control of publicly-funded schools first became part of the public consciousness. This occurred along two lines: anti-Black racism and pro-market ideology. In the southern United States school choice policies became popular in the wake of the court-ordered desegregation of public schooling following the 1954 *Brown v. Board of Education* ruling (Minow, 2008; Ryan, 2004). While in the early 1900s members of the Ku Klux Klan had sought to ensure that all children attended public school in an effort to ‘Americanize’ them, in the face of having to send their children to school with Black children, southern chapters of the organization chose a different strategy. Throughout southern states ‘freedom of choice’ plans were implemented to allow students to choose which public school to attend. These policies were used to maintain segregation by allowing white children to attend white-dominated schools. Other counties even took the extreme step of closing all their public schools in order to prevent integration and providing white children with money they could use to attend all-white private schools (Minow, 2008). Ultimately, these programs were broken up in the mid-1960s through federal action, nevertheless they constituted the first implemented school choice policies in the United States.

At the same time as southern states were implementing school choice policies, Milton Friedman (1955) first published an article making the case for the use of vouchers, or packets of money that students could take to private schools, as the ideal method of governing publicly-funded schooling. In this article Friedman argued that, while there is a role for government in *financing* schooling given its positive externalities, there is no justification for its role in the *delivery* of education. Friedman asserted that allowing private actors to receive public money for

the delivery of schooling would improve the quality and efficiency of education by bringing competitive market forces into the delivery of public schooling — writing that “The interjection of competition would do much to promote a healthy variety of schools. It would do much, also, to introduce flexibility into school systems” (1955: p. 7). Friedman therefore argued that the government should provide every child with a sum of money that they could use to pay for their education and that the role of government should be limited to upholding minimum standards. While this article was published slightly after the advent of choice policies in southern states, Friedman claimed that this coincidence was entirely accidental, writing in a footnote that the paper had been ‘essentially in its present form’ when he learned of segregationist proposals.¹⁷ Friedman’s ideas found little reception at the time, but would live on to influence several proponents of school choice policies who took up his ideas.

Following these segregationist experiments and Friedman’s market-based arguments in the 1950s, school choice policies largely stayed off the radar until the late 1960s. Their revival came from a new ideological base of centre-left intellectuals who envisioned voucher programs as a way to address racial injustices in the existing school system. While Friedman had relied on arguments of efficiency to promote markets, these liberal reformers believed that by structuring voucher programs to provide more money to low-income families, the inequalities of the existing public school system could be addressed (Forman, 2004; Henig 1995; Molnar, 1998). Voucher markets were therefore promoted as a means of promoting social mobility or what Rizvi and Lingard (2009) refer to as the educational value of democratic equality. Nevertheless, these

¹⁷ Friedman (1955) was not dissuaded by the obvious example of how his voucher plan would increase racial segregation, going on to state that it in no way invalidated his proposal since the alternative (public schooling) required a greater evil: the use of state power to shape the behaviour of individuals.

liberal voucher proposals still relied on the ideology of market efficiency, with a report prepared for President Johnson on vouchers asking why “virtually all American communities [have] allowed elementary and secondary education to remain a monopoly or at best a duopoly?” (Education Vouchers: A Report on Financing Elementary Education by Grants to Parents, 1970: p. 3). Importantly, however, they also argued against a market that had no restriction on school operators, stating: “Our overall judgement is that an unregulated market would redistribute resources away from the poor and toward the rich, would increase economic segregation in the schools, and would exacerbate the problems of existing public schools without offering them any offsetting advantages” (p. 31). While these liberal voucher programs failed to move beyond a single demonstration project (Forman, 2004), they did mark a shift in how market-based education reforms were promoted, moving beyond simply an argument of efficiency and towards an association between markets and democratic equality.

School choice policies did not remain dormant for long, and in the 1980s and 1990s Republican presidents Ronald Reagan and George H.W. Bush pushed strongly for market-oriented education reforms. This push was inspired by a belief in the efficiency of markets grounded in the work of Friedman and more recent work of scholars in a similar vein. Most prominently, in the late 1980s Chubb and Moe (1988) released the results of a quantitative study which argued that higher test scores in private schools were the result of the competitive pressure placed on schools by the ‘exit option’ (the ability of unsatisfied students to switch schools); they used this study to argue that all schools should therefore be delivered by the private sector so that the exit option would be felt throughout the public education system as well (Dougherty and Sostre, 1992; Henig, 1995, Viteritti, 2005). Reagan was an especially strong advocate for market-oriented education policies, and introduced voucher programs to congress in 1983, 1985,

and 1986. As Henig (1995) recounts, these voucher proposals ultimately failed because the baggage of earlier debates over religious schools and segregationist programs made both Democrats and Republicans wary of supporting them. This was true of numerous state-level voucher proposals as well, with referenda on vouchers losing by large margins in Oregon, Colorado, Michigan, and California throughout the 80s and 90s (Viteritti, 2005). The existing landscape and the primacy of the agreement on public funding going to publicly-run schools was too much for Reagan to overcome.¹⁸

Nevertheless, the Reagan administration was successful in beginning a conversation on market-based education reform and, perhaps most importantly, seeding the narrative of markets as the saviour of a failing public school system. As discussed in Chapter 3, this was, in part, accomplished through the release of *A Nation at Risk*, a report which painted the picture of a failing school system eroding America's economic competitiveness. The narrative of public school failure was paired with the rebranding of existing education reforms that were designed to combat racial inequalities as market-based solutions. Most notably, the Bush administration reframed magnet schools, alternative schools designed to promote desegregation through drawing students from throughout a school district, as a market-oriented reform rather than as a reform led by school districts (Henig, 1995). Through moves like these, school choice supporters made the argument that market-oriented education reforms would help to promote racial integration and, as such, that they were compatible with educational values like democratic

¹⁸ While the Reagan administration was unable to successfully push for the adoption of vouchers in the 1980s, they did promote the creation of markets *within* the public system by advocating for states to allow students to choose which public school they would attend. The promotion by a sitting President helped prompt 14 states to adopt a market approach within the public system (Henig, 1995). While an important shift, most state governments rejected market-based schooling and therefore the role of markets in public schooling remained limited during Reagan's presidency.

equality. The dual narrative of a failing school system and a progressive market solution set in place by *A Nation at Risk* would echo throughout the next few decades, priming the emergence of market-based policies and helping disassociate school choice from its racist past (Cohen and Lizotte, 2015). In many ways the mobility of charter school policies discussed in the next section was built through these struggles to implement market-based reforms and these attempts to reframe them as compatible with ideas of democracy and equality.

The forty-year history of the failure of market-based education reforms to become mobile therefore highlights how struggles are important to both the mobilization and immobilization of market forms. For one, the legacies of past struggles over the shape of education helped prevent market-based education reforms from spreading. Prohibitions against the use of public money to fund religious schools as well as the legacy of segregation constituted a barrier that rendered such policies immobile and prevented the creation of markets for schooling. However, as shall be explored in the next section, testing these barriers did help weaken resistance to the mobility of market-based education policies and helped build policy networks that would later prove useful in the spread of charter schools. As Temenos and McCann (2013: p. 352) write, this highlights that understanding mobile policies requires “time to fully explore the histories, presents, and outcomes of policy implementation.” The conscious reframing of school choice policies from a segregationist policy to one that would help address inequality in schooling was a necessary move for market-based education reforms to become mobilized and viewed as compatible with the values long-associated with education. Indeed, it was his very history of failed attempts, experimentation, and hybridization that would lead to the development of charter schools and promote their popularity.

This history also highlights the importance of the broader political environment to the promotion of charter school markets in ways that are likely to be applicable to studying other market-making projects. As Block (2011) has argued and as is inherent to the work of Polanyi ([1944] 2001), in eras of market rule the roll out of market-based policies and the dismantling of non-market institutions is easier to accomplish. This can be witnessed in the fact that charter school markets are just one of many areas including health care, prisons, welfare systems, and other social services that have been remade in the image of idealized markets over the past few decades. The fact that attempts to promote market-based education reforms failed for forty years while the political climate was hostile and then, as will be discussed in the next section, found a more hospitable environment in the present-day, points to the importance of a new, neoliberal common sense in smoothing the roll out of charter school markets.

4.3 Markets become mobile: 1991 to 2001

Charter schools first emerged as an idea in the early 1990s and quickly achieved impressive mobility. From when the first charter school law was passed in Minnesota in 1991 to the end of 1998, thirty-five states adopted charter school policies. However, while the mobility of charter schools occurred at a rapid pace, especially in relation to voucher programs, the policy mobilities literature emphasizes that the mobility of any policy is only partial and that seemingly similar policies may contain important differences. This partial mobility can be seen in the variegated landscape of charter schools, with charters having a huge impact on education in some states (for example in Arizona and Colorado where over 10% of students attend charters) while making up only a tiny part of the educational landscape in others (*Public Elementary/Secondary School Universe Survey*, 2015). These variations go beyond scale however, with important differences in governance models, the amount of funding for charter schools, and the rules governing the

management of these schools. As will be reviewed below, these differences can, in part, be understood by focusing on how struggles over circulating models of charter school governance articulated with the politics of different American states.

Charter school policies first appeared at the state level. According to the Senator who introduced the first charter school law, Ember Reichgott Junge (2012), and the policy analyst who helped originate it, Ted Kolderie (1990), the law was inspired by a talk given by Al Shanker, then the head of the American Federation of Teachers. Shanker envisioned charter schools as a method through which public school teachers could create semi-autonomous schools rather than as a market intervention (Peterson, 2010). Kolderie (1990) departed from Shanker's vision however, and explicitly linked the development of the first charter school law to his belief in market efficiency — citing Chubb and Moe (1998) and identifying the state monopoly over schooling as the origins of any failings within the public system. This reliance on market-based governance was not total however, and Kolderie also argued for the importance of regulating charter schools through accountability measures and publishing information that would help parents decide where to send their children. As the report proposing the law stated: "The system proposed here is a competitive system... But it is also a public system. The schools will serve public objectives and will be publicly accountable for the public support they receive" (Kolderie, 1990: p. 10). In this way Kolderie sought to create a middle ground between vouchers and the traditional public school system while still adhering to the idea of market competition as a positive force.

In California, the second state to pass charter school legislation in 1992, it was this middle ground that convinced state Senator Gary K. Hart¹⁹ and staffer Sue Burr to promote the policy. Hart and Burr (1996) recount that they were looking for a compromise position between voucher programs and the public system when they learned about Minnesota's charter law and, upon further research, the work of Al Shanker. As they write:

we were convinced that the voucher initiative should not be taken lightly. It was almost like playing Russian roulette with public education, except instead of having a one-in-six chance of being hit by a deadly blow, the odds were closer to 50-50. Something had to be done to respond to the public's frustration with public schools, and it seemed possible to us to craft a legislative proposal that did not sacrifice the attractive features of the voucher movement – namely, choice of schools, local control, and responsiveness to clients - while still preserving the basic principles of public education: that it be free, nonsectarian, and nondiscriminatory (Hart and Burr, 1996: p. 38).

This threat of voucher legislation was common to many states which ultimately adopted charter school legislation. Reflecting back on their successful efforts to pass charter school laws in the book, *Education Reform Before It Was Cool: The Real Story and Pioneers Who Made It Happen* (Allen, 2014), the 'pioneers' from New Jersey, Pennsylvania, and Washington D.C. all discuss the presence of vouchers as being a key factor allowing for the passage of charter school legislation. For example, Melanie Shulz from New Jersey wrote that "Vouchers served the charter school effort well; though no one would publicly admit it; many legislators were happy to

¹⁹ Not to be confused with the Colorado senator of the same name who ran for the Democratic party nomination in 1988.

eliminate the prospect of vouchers knowing that charter schools would be a far more acceptable public school reform” (p. 70-71). It was therefore the threat of vouchers which enabled the mobility of the charter school policies to many American states.

Importantly however, rather than flowing through one policy network, charter school policies were mobilized by multiple networks which seized upon them to promote specific understandings of the concept which best fit their ideological leanings; networks which state legislators tapped into along largely partisan lines and according to the political climate of their state (Bulkley, 2005). While both Republican and Democratic networks exhibited a faith in markets, the lineage and the degree of regulation informing their ideal market for education differed between parties. Republican support for charters emerged out of a long-standing history of voucher advocacy and neoconservative ideology and thus emphasized charter systems with very little public oversight; in contrast, Democratic support was characterized by the advent of the Blair/Clinton “third way” politics which combined a neoliberal faith in markets with a liberal sense of justice and therefore which emphasized tighter systems of control over charter school operators. The mobility of differing visions for charter schools through these networks was facilitated by a lack of fixed meaning to the policy in its emerging stages, a looseness which allowed charter schools to be seen as ‘all things to all people’ (Bulkley, 2005: p. 27). In this manner, charter school policies acted as what Peck (2012b: p. 240) terms a ‘vehicular idea’ where the inherent ambiguity of a concept allows it to “function as [a] facilitative [frame], working around blockages, disarming opponents, enabling new projects to move forward.”

The malleability of the charter idea and the importance of networks of travel can be witnessed by the speed at which existing conservative groups which had supported vouchers took up an idea promoted by a Democratic State Senator and inspired by a union leader. One of

the first nation-wide groups promoting charter schools, the Center for Education Reform (CER) illustrates this lineage. The CER was founded in 1993 by Jeanne Allen who had previously worked for the neoconservative Heritage Foundation and for the Reagan-era Department of Education (The Center for Education Reform, 2017). Allen had previously written articles supporting voucher plans (Miner, 2004) but pivoted into the charter school space in the early 1990s and became a leading figure in the charter school movement. Her organization, the CER, often acted as a convener of charter school advocates by holding conferences and Allen helped found the Education Leadership Council, an organization of market-oriented state superintendents. Perhaps most notably, the CER pushed for a model of charter school laws that had weak state oversight by publishing a ranking of ‘strong’ and ‘weak’ laws based on how strongly charters were regulated and how many institutions could authorize new charter schools (Allen, 2014; Education-Charter Schools, n.d). Similarly, Louann Bierlein of the conservative Hudson Institute began to promote charter schools in the mid-90s and later became an advisor to Louisiana’s governor as the state drafted a charter school law (*Hearing on Charter Schools*, 1997). These conservative think tanks, which had long promoted voucher programs through the failed attempts outlined earlier, moved quickly to promote charter school legislation that focused on competition between charters and the public system as a method of disrupting public schooling.

Democrats were also heavily involved in promoting charter school legislation to state governments, largely through the leadership of President Clinton. Even before becoming President, Clinton was an advocate for charter schools in his position as the head of the Democratic Leadership Council (DLC), an organization that promoted legislation to state-level Democrats. DLC support for charter schools was immediate, as State Senator Junge of

Minnesota wrote, "Within a couple of weeks, Minnesota's reform hit the national scene... Arkansas Governor Bill Clinton, who was head of the Democratic Leadership Council at the time, shined a spotlight on what we had done" (Junge, 2014: p. 44). This advocacy only accelerated once Clinton was in the White House. Clinton used the bully pulpit of his State of the Union addresses to promote charter schools in 1994 and from 1996 to 2000. More materially, he implemented the Charter Schools Program to fund the start-up of charter schools in 1994 and consistently helped increase the funding of the program from \$6 million to \$100 million over the course of five years (Education-Charter Schools, n.d). This funding spurred the creation of charter school markets by providing a new source of money for cash-strapped states. Perhaps more influentially, the program was augmented by consistent behind the scenes lobbying by Clinton and his staffers. As the records of Bruce Reed, Clinton's Domestic Policy Advisor,²⁰ highlight, the administration closely tracked the status of charter school laws in each state, arranging visits from the President when new laws were passed, sending letters to Governors encouraging them to draft legislation for charter schools, issuing a Presidential directive to support charter schools to the Secretary of Education, and lobbying Senators and Congressmen to support the Federal Charter Schools Program (Charter Schools [1], n.d.; Charter Schools [2], n.d.; Education-Charter Schools, n.d.). While also emphasizing the importance of competition, the Clinton Administration's initiatives placed a greater emphasis on accountability and benchmarks than Republican efforts.

²⁰ Reed also led Clinton's welfare-to-work program the Personal Responsibility and Work Opportunity Act and later headed the Broad Foundation, a prominent philanthropy pushing for market-oriented education reforms which, as outlined in Chapter 6, is extremely influential in Detroit.

These initiatives on behalf of both parties highlight how the flexibility of the charter school concept allowed its spread through different ideological networks, with conservative think tanks quickly taking up the mantle of charter schools and pushing towards a deregulated market and the neoliberal wing of the Democratic party advancing a more regulated vision for schooling markets. Importantly, this set up a running battle from state-to-state as these different policy networks attempted to promote their ideal version of charter school laws, highlighting the role of struggles over market forms in shaping their emergence and their systems of governance. For example, Bulkley (2004; 2005) in comparing the decision to adopt charter school policies in Arizona, Georgia, and Michigan, notes that the two Republican states (Arizona and Michigan) relied heavily on the Center for Education Reform and local conservative think tanks when developing their charter school policy, while Georgia, which had a Democratic governor, worked closely with the Democratic Leadership Council. The different networks and ideologies had real impacts on the nature of charter school laws in each state with Arizona not including accountability legislation (since parental decisions would presumably hold schools accountable) and Georgia limiting charter schools to conversions of public schools that had two-thirds approval of faculty and staff.

4.3.1 Michigan and Oregon's adoption of charter school laws

Both Michigan (1993) and Oregon (1999) adopted charter schools during this time period and the history of each state's charter school law illustrates the importance of national networks, political struggles, and local contextual factors in shaping charter school markets. In Michigan, charter schools were promoted by a network of actors including then Governor John Engler, an early member of the American Legislative Exchange Council who was strongly influenced by the work of Milton Friedman (Goenner, 2011). Engler, and associated conservative groups had

previously supported education vouchers but quickly changed course once they learned about charter schools (DeWeese, 1994; Goenner, 2011; Lubienski, 2001). Realizing the potential of charter school laws to avoid the longstanding constitutional amendment against funding religious schooling dating back to the Blaine Amendment, Engler worked with TEACH Michigan to help draft charter school legislation. This legislation was designed to move as closely to Friedman's version of a schooling market as possible. It did so by granting multiple organizations the ability to authorize new charter schools, thereby reducing the ability of these organizations to hold charter schools accountable since charter schools could shop for the most permissive authorizer under this system. Furthermore, it sought to create competitive pressures within the public system by changing Michigan's funding model to a per-pupil system which meant that school districts would lose money for each student in their district who opted to attend a charter school (Goenner, 2011). The receptive political climate in Michigan thus allowed the policy model circulating through neoconservative networks to be rolled out relatively unimpeded.

Oregon however presented a vastly different environment for those attempting to promote charter school policies. Indeed, Oregon only passed a charter school law in 1999 after two failed attempts in 1995 and 1997.²¹ As in Michigan and many of the states discussed above, the impetus for charter school legislation came from voucher supporters who saw potential in the charter school model to advance school choice in general. The first attempts to implement a charter school law illustrate this relationship between the promotion of charter school policies and longstanding networks of voucher supporters. Notably, the libertarian Cascade Policy

²¹ Oregon's State Legislature meets every two years, so charter school laws were heard in the legislature in every session from 1995 to 1999.

Institute and the associated Center for Education Change organized conferences promoting charter schools in 1993 and 1994 (Oregon Charter School Report Card, 2006; Reinhard, 1994). According to a think tank researcher active at the time, charter schools were appealing to these libertarian groups primarily because they were a politically feasible school choice policy in the wake of a failed voucher referendum:

One of our academic advisors... got interested in this charter school movement and told us about it. And my first thought was that's pretty mild, I don't know if I want to spend much time working on charter schools because it's still a public school, but he convinced us to try it. So we brought Ted Kolderie out and it sort of caught interest. It was the first politically doable chink of the armor in the public school monopoly that was working in other states.²²

This meant that in the early-to-mid 1990s ideas of charter schools mostly flowed to Oregon through conservative networks which had already existed around a failed 1990 voucher referendum. These networks brought national figures such as Ted Kolderie from Minnesota and Jeanne Allen from the Center for Education Reform to the state and promoted a version of charter schools based around a multiple authorizer system as seen in Michigan (Reinhard, 1994). However, their proposed legislation was heavily opposed by the powerful Oregon Education Association (OEA) and ultimately failed over the issue over who should be allowed to charter schools, with the OEA arguing that if the state was to adopt charter schools, they should be under the purview of local school districts (*The Oregonian*, 1995; *The Oregonian*, 1997).

²² Thinktank researcher, Oregon, 18 June 2015

In 1998 alternative policy networks also began to promote charter schools in Oregon. At around this time Alex Medler from the U.S. Department of Education visited the state to discuss charter schools at the invitation of both Republicans and Democrats (*The Oregonian*, 1998a). This visit roughly corresponded with the news that the state had lost out on \$4.8 million in federal grant money due to its lack of a charter school law and this loss of funding helped shape the narrative that a charter school law was desirable (*The Oregonian*, 1998b). Given this context, and that a Republican House and Senate were sharing power with a Democratic Governor at this time, a charter school law was able to make it through the legislature in 1999. However, the law included several compromises from the original libertarian proposals, reflecting the OEA's opposition to an unrestricted charter school policy. While negotiations began with a multiple-authorizer version of the bill, the threat of a Gubernatorial veto combined with a public narrative that a more restrictive charter school law would be wise, resulted in a far more restrictive piece of legislation. The final version of the law put in place a system of local school district control over the opening of charters, emphasized the importance of state-wide assessment, and banned private schools from becoming charter schools (a long-standing DLC policy). This meant that charter schools ended up as alternative schools within a system characterized by local control rather than the remaking of public schooling as a whole as witnessed in Michigan (*The Oregonian*, 1999a; *The Oregonian*, 1999b; *The Oregonian*, 1999c).

Reading these two cases in concert reveals a number of important factors regarding the spread of charter school policies. For one, the process of promoting charter school policies was shaped by struggles between neoconservative and liberal networks and their articulation with different political contexts. For example, in both Michigan and Oregon, conservative policy networks with a history of promoting voucher policies advanced charter school proposals;

however, in Oregon the ability of the OEA to mount an effective resistance to the smooth roll out of a libertarian model meant that its system differed greatly from Michigan's. While conservative think tanks pushed as far towards a deregulated market as possible in many American states, the neoliberal wing of the Democratic party advanced a more regulated vision for charter schools in places like Oregon and thereby helped forestall the most market-oriented aspects of such models. This meant that the form that charter school legislation took, and therefore the shape of charter school markets, was the result of a running state-by-state battle. This running battle highlights both the role of spatial variegation in the functioning of markets and the role of political contestation in producing this variegation.

This running battle also illustrates the importance of understanding the movement of policy models as always partial and the key role of failure in producing new, hybrid policies that can achieve popularity. Charter schools were only able to become mobile because of the threat of voucher policies. As numerous actors recounted, it was precisely the reluctance to pass voucher policies that made charter schools seem like a relatively moderate choice and which facilitated their popularity. Therefore, even in places where charter school models were rolled out relatively smoothly like Michigan, this mobility only followed failed attempts to put in place voucher programs. The roll out of charter school policies must therefore be understood within this legacy of past failures leading to the creation of a new, hybrid model that found a fit with local political contexts across the United States. Furthermore, while political efforts in places like Oregon were not able to prevent the passage of charter school laws, they were able to immobilize aspects of these policies that the education community viewed as the most harmful.

What can also be seen through this longer historical focus is the importance of momentum and the strength of pro-market advocacy networks in the mobilization of charter

school policies. The Oregon case, where charter school policies failed twice before their ultimate adoption, highlights the difficulty in resisting these networks – a difficulty that increased as the power of such networks grew over the following decades. Indeed, as will be outlined below, the pressures to adopt charter school policies have only become stronger and all but seven American states now have some form of charter schools. Even more than Oregon, Washington State presents an excellent example of the relentlessness with which charter school policies are mobilized. While the state finally adopted a charter school law in 2012, it did so only after seven unsuccessful efforts to pass a charter school law and after three failed public referendums which were largely funded by the Bill and Melinda Gates Foundation amongst others (Cohen and Lizotte, 2015). Thus, even in states highly resistant to charter school policies, the ability to restrict their entry has often been, at best, partial. The material wealth mobilized to produce markets in American schooling highlights the highly uneven power available to actors attempting to shape (or resist) schooling markets, thereby linking the politics of these particular markets to wider circulations of power, or the micro to the meso in the words of Braun (2015).

4.4 Ongoing mobilities

While the chapter has so far focused on charter school policies at their initial moment of travel, policies are not static but always evolving, with ‘best practices’ continually circulating and remaking policies while long-standing, socio-political contexts continue to immobilize or accelerate different policy options. In the case of charter school policies, this is readily apparent. Since the 1990s actors such as the federal government, large philanthropists, and corporations have continued to promote their own, idealized version of charter school policies. This is because as charter schools have become an increasingly important part of the schooling landscape, a corresponding increase in attention has meant that charter school markets are constantly the

subject of reform efforts by powerful actors. Particularly common are efforts attempting to harmonize the operation of charter school markets across state lines in order to facilitate the easy movement of charter school operators into new states. While they are not always successful, these efforts illustrate the importance of paying attention to how circulating geographies of power are brought to bear upon policies even long after their initial implementation.

The increased attention to the functioning of charter school markets has included the continued influence of networks that were involved in their initial travel as well as the emergence of new groups which have sought to shape legislation since that time. These ongoing mobilities can be, in part, understood as a reaction to differences in charter legislation between states like Michigan and Oregon. For the federal government, large philanthropists, and national think tanks these state-level idiosyncrasies are viewed as departures from ‘best practices’ that can lead to inefficiencies in charter school systems and prevent the implementation of standardized solutions, and which therefore must be corrected. Similarly, for non-profit charter school chains and corporations who are national in scale, these differences are barriers that can disrupt economies of scale and make it difficult to move into new environments. However, the push for harmonization we see from these organizations is not universal. Indeed, a growing resistance to charter schools and associated policies such as school closures and standardized assessments has resulted in a counter-movement which actively works against the further deepening of charter schools and other market-oriented policies (Au and Ferrare, 2015; Cohen and Lizotte, 2015).

The growth in federal programs designed to increase the number of charter schools is instructive as to how power is mobilized to shape charter school policies. President G.W. Bush’s landmark education legislation No Child Left Behind (NCLB) continued President Clinton’s

promotion of charter schools. Most notably, it allowed for the reopening of poorly-performing public schools as charter schools and increased financial support for the planning, program design, and implementation of charter schools (Mora and Christianakis, 2011). However, it was President Obama’s Race to the Top program (RTTP) that not only encouraged growth in the number of charter schools, but also sought to remake charter school laws to comply with a specific vision for how charter school markets should function. RTTP pushed the standardization of charter school policies through a competitive grants program where funding was awarded based on how closely states adhered to policy prescriptions such as the removal of restrictions on the number of charter schools, a focus on standardized assessments as a means of judging schooling, and the use of turnaround strategies including converting the “lowest achieving schools” into charters (Cohen and Lizotte, 2015). In a press release discussing the program, Secretary of Education Arne Duncan made this orientation clear, letting applicants know that:

States that do not have public charter laws or put artificial caps on the growth of charter schools will jeopardize their applications under the Race to the Top Fund. To be clear, this administration is not looking to open unregulated and unaccountable schools. We want real autonomy for charters combined with a rigorous authorization process and high performance standards. (U.S. Department of Education, 2009).

RTTP therefore acted as a carrot that helped pull states towards certain types of charter systems, making the state-level particularities forged through struggle in places like Oregon the target of pressure from the federal government.²³

²³ The Trump administration has yet to announce a keystone education policy. However, from the budget recently proposed by Secretary of Education Betsy DeVos it is clear that a focus on producing certain types of markets has only accelerated. The proposed budget includes \$1.4 billion in funding for school choice policies including vouchers even while implementing a total budget cut of \$9.2 billion. Most notably it redirects \$1 billion in funding

Undoubtedly, NCLB and RTTP have had a large effect on how charter school markets have evolved at the state level. RTTP has provided not just a financial incentive for states to align with the vision of the Obama administration but also discursive cover that has helped politicians justify controversial changes. This can be seen in the debates over whether mayors should be put in charge of urban school districts (Cohen and Lizotte, 2015). In Wisconsin for example, the state's governor used the RTTP competition to push for mayoral control of Milwaukee's school board and to castigate locals when they resisted, stating:

Because state lawmakers haven't fixed the serious need to reform Milwaukee Public Schools, because we haven't created a clear line of accountability and the authority to bring change in Milwaukee, every other school district in the state is likely to miss out on this important opportunity (Richards, 2010).

In Michigan, state control over the Detroit school system (outlined further in Chapter 6) was in part shaped by the state's RTTP application. Indeed, the creation of the Education Achievement Authority, which was used to takeover 15 schools in the city, was a key feature of Michigan's application (Mason and Arsen, 2014). In this way, by providing financial incentives and the discursive strength of the President's office, the federal government has pushed its preferred governance arrangements on state governments (Schott et al., 2016).

The federal government is hardly alone in using funding to promote policy changes however. As Mitchell and Lizotte (2014) and Scott (2009) have argued, philanthropic organizations have also used their funding power to shape charter school systems. This has

for low-income students to a program (Furthering Options for Children to Unlock Success) that requires that districts allow students to pick their school rather than assigning them to a neighbourhood school if they wish to receive funding (Brown et al., 2017).

involved large outlays of funding, as the Bill and Melinda Gates Foundation, the Eli and Edythe Broad Foundation, and the Walton Foundation have spent hundreds of millions of dollars directly funding not only charter schools but also special-interest groups, education companies, electoral campaigns, and school districts themselves. For example, the Bill and Melinda Gates Foundation has spent over \$40 million on District/Charter Collaboration Compacts which provide funding to school districts across the United States that put in place policies that aid charter schools (*Bill & Melinda Gates Foundation*, 2011). These compacts require that public schools share facilities and service contracts with charter schools, that the district closes ‘low-performing’ schools or turn them into charter schools, and that the district commits to aid in spreading ‘high-performing’ charter school chains (Yatsko, Nelson & Lake, 2013). Similarly, in Michigan, the Eli and Edythe Broad Foundation has been crucial in supporting the process of emergency management in Detroit and the related growth of charter schools in that city. For example, the Broad Foundation paid the salary of Detroit Public School’s emergency manager, provided start-up funds of \$10 million for the Education Achievement Authority, and paid for Paul Pastorek, the state superintendent who oversaw the creation of New Orleans’ charter school model, to advise Governor Rick Snyder on education reform (*Detroit News*, 2014; Mason and Arsen, 2014). In this way foundations have helped push for their preferred policy options through the allure of philanthropic funding and the material support of groups whose goals align with their own.

The work of these funders has led to an uneven geography of charter schools across the United States. Many foundations prefer to work with school districts that adhere to their policy models and this has resulted in funding flowing into some locations while bypassing others. This is important because in places where foundations are active, foundation money can greatly shape

which actors are present. This is because non-profit chains that can access cheap philanthropic funding are able to gain an advantage over smaller charter school operators. Notably, Scott (2011) documents that in 2008-2009 philanthropic actors donated \$31 million to New York City charter schools, with the vast majority of the funding going to large charter management organizations rather than community-run charter schools; such funding greatly shapes which schools have an advantage in the marketplace through superior resources and advertising dollars. These decisions about where to invest are highly political and help shape which school districts receive funding and therefore where charter school markets are strongest. For example, Bill Gates has stated that “the cities where our foundation has put the most money is where there is a single person responsible” (Campanile, 2009), meaning school districts under state or mayoral control. Similarly, the Walton Foundation pulled funding for all schools in Chicago after a political backlash against charter schools left them without organizational partners (Sanchez, 2016). With millions of dollars in funding available to them, these organizations both support specific actors in charter school markets and shape where markets spread through their funding decisions.

Corporations have also played an important role in shaping the functioning of charter school markets. Perhaps most famously, the American Legislative Exchange Council (ALEC) made up of both legislators and corporations has used ‘model laws’ to shape state systems to facilitate profit-making. Figure 4.1 below provides an example of one such model law proposed by ALEC, The Next Generation Charter School Law, which would help corporate profitmaking by removing any distinction between non-profit and for-profit schools, by allowing full funding to go to virtual charter schools, and by installing a multiple authorizer model. These model laws have been promoted throughout the United States. For example, Tennessee state representative

Harry Brooks introduced an ALEC law drafted by K12 Inc. a national for-profit virtual charter school, that would have increased state funding for virtual charter schools helping K12's profit margin (Fang, 2011). In Oregon, the system of local control described above has been challenged by national virtual charter school chains who have located in rural districts but operate on a state-wide basis and who are very much embedded in these networks (see Chapter 5). Through model laws and advocacy, corporations have therefore also helped harmonize charter school markets in ways that work to their advantage.

Figure 4.1: ALEC Model Law

THE NEXT GENERATION CHARTER SCHOOLS ACT

Section 1. {Title.} The Next Generation Charter Schools Act

Section 2. {Declaration of Purpose.}

(A) The General Assembly hereby finds and declares that

(1) The Charter School Act of [year] as approved by this body has provided students in our state with high-quality public school choices while advancing overall academic excellence^[1] and helping to close the achievement gap; and

(2) Will provide parents flexibility to choose among diverse educational opportunities within the state's public school system

(3) The demand for quality public school choices in [state] consistently outstrips the supply; and

(4) National research and accumulated experience have documented that quality public charter schools best fulfill their potential when they have the resources, autonomy and accountability they need to succeed.

(B) The General Assembly further finds and declares that the provisions established in this article update and improve [state's] Charter School Act to meet [state's] 21st century educational needs.

Section 3. {Definitions.}

(A) "Charter authorizer" as used in this article means an entity or body established in Section 4 to approve charter schools. An "authorizer" means an entity authorized under this Act to review applications, decide whether to approve or reject applications, enter into charter contracts with applicants, oversee public charter schools, and decide whether to renew, not renew, or revoke charter contracts.

(B) "Charter Board or Commission" means the independent, state-level entity created pursuant to Section 4 as a charter authorizer.

(C) "Charter applicant" means an eligible person(s), organization, or entity as defined by the Charter School Law that seeks approval from a charter authorizer to found a charter school.

(D) An "application" means a proposal from an applicant to an authorizer to enter into a charter contract whereby the proposed school obtains public charter school status.

(E) A "charter contract" means a fixed-term, renewable contract between a public charter school and an authorizer that outlines the roles, powers, responsibilities, and performance expectations for each party to the contract.

(F) A "conversion public charter school" means a charter school that existed as a non-charter public school before becoming a public charter school.

(G) An "education service provider" means a for-profit education management organization, non-profit charter management organization, school design provider, or any other partner entity with which a public charter school intends to contract for educational design, implementation, or comprehensive management.

(H) A "governing Board or Commission" means the independent Board of a public charter school that is party to the charter contract with the authorizer and whose members have been elected or selected pursuant to the school's application.

(I) A "local school Board" means a school board exercising management and control of a local school district pursuant to the state constitution and state statutes.

(J) A "non-charter public school" means a public school that is under the direct management, governance, and control of a local school board or the state.

(K) A "parent" means a parent, guardian, or other person or entity having legal custody of a child.

(L) A "public charter school" means a public school that:

Source: *American Legislative Exchange Council, 2016*

Working across government, philanthropic, and corporate lines are think tanks, advocacy groups and other ‘intermediary organizations’ who have also played an important part in pushing for their preferred policy models and against state-based variations which prevent their implementation (DeBray et al., 2014). These organizations often work in tandem with government and philanthropy and many receive their funding from foundations like Gates and Walton. By offering seemingly neutral reports, think tanks have been able to shape the discursive realm within which charter school laws are debated. For example, groups like the Center for Education Reform, the National Alliance for Public Charter Schools, and the National Association of Charter School Authorizers all publish rankings of charter school systems that prioritize their ideological preferences and provide support for those seeking to change existing state-based systems. Other groups have been active in producing and circulating research used to argue for or against policy options, often using foundation funding to do so. In this way these think tanks act as an extension of the policy networks outlined above (Scott and Jabbar, 2014). The research prepared by these groups provides legitimacy and helps to shape which model policies are viewed as legitimate and suitable for consideration. For example, the Recovery School District in New Orleans has been trumpeted as a policy model based on research conducted by groups like New Schools for New Orleans (DeBray et al., 2014).

While these groups, the federal government, philanthropists, corporations, and intermediary organizations have been presented separately above, on the ground they often work in tandem and are difficult to disassociate. For example, while RTTP is a federal program, the Gates Foundation was intimately involved in its creation and in the promotion of the program to state governments. Most notably, the Gates Foundation provided \$250,000 grants to states to fund their application process for RTTP. Further illustrating the uneven flow of money from

foundations, this funding was originally offered to only a select few states before a political backlash forced the Gates Foundation to open funding to all states that were willing to sign an eight-point checklist (Dillon, 2009). Similarly, Gates, Walton and ten other major foundations have provided \$500 million in top-up funding for winners of the federal government's \$650 million Investing in Innovation Fund, including \$178 million specifically targeted at charters and turnaround schools (Bill & Melinda Gates Foundation, 2010).

This level of coordination is not universal among pro-market reformers. Indeed, within the pro charter movement there are important differences, especially at the state and local level. While standardized testing has been an important area of focus for the Gates Foundation, the Walton Foundation has spent the majority of its funds (including an announced \$1 billion in future investments) on seeding new charter schools (Prothero, 2016). There are also tensions between the liberal and conservative ends of the charter movement regarding how charter schools should be regulated. In Detroit for example, while there is some sort of consensus around the importance of charter schools, when liberal groups pushed for an 'education commission' that would regulate the opening and closing of charter schools, they came into conflict with the libertarian end of the charter school movement (see Chapter 6 for more details). Similarly, at both the national and state levels online charter schools have been controversial amongst many charter school supporters in light of their poor results on standardized test scores, with high profile actors like the Walton Foundation criticizing them publicly (Sternberg and Holly, 2016). What these cases indicate is that while pro-market education reformers often work together on some issues, they diverge on others (Ball, 2012b). This is important to keep in mind when examining how markets have emerged in particular sites where members of the pro-charter

network may diverge or where a particular actor, such as the DeVos family in Michigan, may play a larger role than other members of the network.

It is also important to emphasize that not all national groups active in shaping the discussion around charter schools are pro-market. Notably, the past decade has seen an increasingly well-organized anti-market and anti-testing movement that has pushed back against the smooth roll-out of market systems in education. This movement has formed out of various existing groups such as teachers' unions, civil rights groups concerned with mass school closures, and parent groups concerned with the growth in standardized testing. While lacking the resources of foundations like Gates and Walton, this movement has seen a level of success in pushing back against market-based education reforms. For example, while millions spent promoting the 'Common Core' state standards helped them get adopted in 45 states, resistance from conservatives angry about the federal infringement on state's rights and liberals mobilizing against the rise of standardized testing caused several states to withdraw from the standards (Apple, 2016; Brown, 2015; Strauss, 2014). Opposition to the roll out of market-based strategies has also been effective in causing philanthropic dollars to move elsewhere. For example, widespread protests against school closures and charter openings in Chicago and Newark resulted in the Walton Foundation pulling funding from both cities. Without philanthropic dollars propping up the growth of charters and funding local lobby groups, the schooling markets in those cities are likely to take a very different shape.

Also notable is that groups opposed to market-based education reforms and standardized testing have circulated discourses that have been mobilized to reshape charter school markets. This has included actively resisting the narrative that market-based schooling is compatible with educational values by national networks that share research findings and resources. For example,

the Network for Public Education and the Badass Teacher's Association have annual conferences that bring together anti-market and testing groups and work throughout the year to share information about local struggles. These activities have been circulated amongst an active community of education bloggers who have undertaken research into the activities of groups like the Gates Foundation and Pearson Education. While these groups do not have the resources of large foundations and the federal government, as mentioned above their actions in cities like Chicago and the large-scale 'opt-out' movement against standardized testing have helped to slow the creation of markets in public education.

Among communities of colour impacted by school closings, there has also been a mass resistance effort that has fought against the imposition of market rule and associated school closures. Organizations like the Journey for Justice Alliance and The Alliance to Reclaim Our Schools have led mass protests including 'walk-ins' to protest school closures in 900 schools across 30 cities (Rizga, 2016) as well as a hunger strike against school closures in Chicago (Eltagouri and Perez, 2016). Most recently, the Journey for Justice have launched their #WeChoose campaign which explicitly rejects a market approach to schooling and its framing of students and parents as individualized consumers. They have done so by turning the language of choice on its head with the slogan "#WeChoose equity, not the illusion of 'school choice'". As they write:

We reject appointed school boards. We reject zero tolerance policies that criminalize our children. We reject mediocre corporate education interventions that are only accepted because of the race of the children served. We choose equity (#WeChoose Campaign, 2017).

While groups like the Journey for Justice Alliance do not have the material resources of large philanthropists or the federal government, they do exhibit a strong counterhegemonic argument that rejects market logic in schooling. Furthermore, the Journey for Justice alliance has publicly linked the marketization of schooling to other, related projects such as gentrification, racialized police violence, and the erosion of social services. Similarly, groups like Black Lives Matter and the NAACP have connected their struggles for racial justice to resisting the imposition of charter schools on majority Black communities (Nguyen et al., 2017). In this manner, anti-charter groups have linked the political battles over charter schools to a wider resistance against hegemonic forces and sought to build coalitions that can work across these multiple struggles. As argued in Chapter 2, the increasing power of market rule has required that such counterhegemonic politics in play out at least in part through a struggle over markets such as charter school markets.

The anti-market movement and its coordination through the networks outlined above signal the growing strength of what Temenos (2017: p. 2) refers to as counter-mobilities or “the resistances, disruptions and alternative pathways used in activism for policy reform by people in disparate locations.” As Temenos charts in the case of harm reduction drug policies, activists have also been able to create networks that work across geographic boundaries to mobilize ideas, research, and expertise in service of implementing progressive policies or pushing back against regressive ones. In Detroit for example, state legislators and local activists spoke of connections to groups like the Badass Teacher’s Association and the Network for Public Education.²⁴

²⁴ State legislator, Michigan, 5 February 2015; Education activist, Michigan, Oregon, 3 February 2015

Similarly, local groups Keep the Vote / No Takeover and the Detroit LIFE Coalition are part of the Journey for Justice alliance and helping to organize nation-wide campaigns. This level of coordination across cities and the sharing of research shows that counterhegemonic networks exist alongside those promoting market reforms in education. As Temenos (2017) argues, despite the fact that such networks of expertise are often mobilized in service of power, they can also be used to resist and shape progressive alternatives.

Regardless of their orientation, what is common to all of the groups outlined above is that they are active at a national level and consciously work towards shaping charter school markets across the United States. What has shifted since the 1990s is that these national networks are now working within a defined policy environment. This means that, rather than seeking to promote an unknown policy, programs like Race to the Top and the District/Charter Collaboration Compacts are actively trying to remake existing policy environments in ways that push the governance of charter schools towards their preferred models. While the initial travel and mutations of the charter school idea in places like Michigan and Oregon meant that they had vastly different systems of charter school regulation and authorization, under the weight of powerful circulating discourses, money, and legislation, these differences have begun to narrow.

Evidence of this narrowing can be found in many of the legislative changes and current debates around charter schools. As outlined above, the focus on standardized testing as the means through which charter schools can be judged has taken an increasingly important role due to the efforts of the federal government, philanthropists, and education corporations. Changes to the way charter schools are governed by authorizers also bears witness to the narrowing of state-based differences. For example, while Michigan from the outset allowed state universities to sponsor and oversee charter schools, in many other states (like Oregon) the opening of schools

was limited to local school districts. This tight local control over school districts has been a target of many pro-market groups who would rather pro-charter groups be in charge of deciding whether to authorize charter schools (The State of Charter Schools, 2011). Indeed, multiple authorizer systems are promoted in all model charter school laws published by pro-market groups and are used as a grading criteria by groups like the Center for Education Reform, the National Alliance for Public Charter Schools, and the National Association of Charter School Authorizers.

A 2015 report for the Pennsylvania General Assembly on using multiple authorizers bears witness to the convergence of actors on this system. The report clearly lists the sources it consulted in making its recommendation for a multiple authorizer system:

Much of the information contained in this report was obtained through the National Association of Charter School Authorizers (NACSA). NACSA is a nonprofit, 501(c)(3) organization founded to advance excellence and accountability in charter schools.

Information was also obtained through the Pennsylvania Coalition of Public Charter Schools, Pennsylvania Campaign for Achievement Now, Research for Action, The Center for Education Reform, the Center for Research on Education Outcomes, and the National Association for Public Charter Schools (*The Feasibility of Alternative Methods for Authorizing Charter Schools in Pennsylvania*, 2015: p. 1)

These sources reflect the ability of national actors to help reshape the way charter school markets are governed at the state-level by establishing what is considered ‘best practice.’

Furthermore, while the influence of NACSA and other national charter groups is obvious, the links between ostensibly local groups and the national policy conversation is less obvious at first glance. For example, while the Pennsylvania Campaign for Achievement Now seems like a

local group, it is a satellite group founded by 50CAN, a national organization funded by the big three foundations (Broad, Gates, and Walton) which has a stated goal of setting up local support for its national mission to ‘expand choices’ as a way of addressing the racial achievement gap (50CAN National, 2017). Pennsylvania’s experience is just one example of a broader pattern of national organizations advancing pro-market arguments through what Scott and Jabbar (2014: p. 238) refer to as the ‘hub and spoke’ model where:

philanthropists see their investments in [local groups] as a way to realize more promising and effective educational interventions whose “profit” is understood to be a scaling up of reforms they favor. The sum total of their investments is a reform movement propelled forward by these entrepreneurial organizations.

By funding (and often founding) local groups that support their policy agendas, large national foundations and companies assert pressure from multiple directions, helping to create the illusion of consensus for their policy models (DeBray et al., 2014; Scott et al., 2015; Scott and Jabbar, 2014).

The most recent wave of mobility of policies surrounding charter schools are thus a shift from the politics surrounding the initial adoption of charter school policies in the 1990s. Whereas charter school policies at that time were characterized by their ambiguity and the subsequent variations in their form between states, since that time the mobilization of power has been centred on moving charter school markets in the direction preferred by large actors such as the federal government, philanthropists, and corporations. This has helped to erase much of the state-level variation in how charter school markets function, although, as will be explored in the next chapter, these differences have not been totally removed. Of course, this is not a monolithic process, with tensions both within the pro-charter movement as well as between this movement

and those resisting the spread of charter schools. What is clear however is that these struggles do not occur on an even terrain, with the substantial dollars of pro-charter groups often marshalled to promote their preferred policies.

The continual use of this power long after the implementation of charter school policies is interesting both for scholars studying the geography of markets and of policy mobilities. For the latter, much of the work studying policy mobilities has understandably focused on how policies travel and move during their initial take-up; what can be seen in the case of charter schools is that this may be only part of the story, with the continual reshaping of policy also an important aspect of understanding the mobility of policy. In relation to studying markets, the constant remaking of charter school markets through the circulation of power and funding are perhaps instructive regarding Christophers (2014b; 2015) challenge to study how markets are stabilized and what variations capital can accommodate. As recounted above, powerful actors like the federal government, large philanthropists, or corporations are able to mobilize resources to reshape markets in ways that fit their vision for these markets or that advantage their operations. The use of power to reshape markets is an important factor in understanding how charter school markets have been shaped by uneven power relations. Nevertheless, it is also important to note the ‘counter-mobilities’ that resist these powerful actors, advancing counterhegemonic arguments and building connections across disparate sites.

4.5 Conclusion

The over half-century of market-based education policies reviewed above reveal how charter school markets have been greatly shaped by the legacy of decades of efforts to promote market-based schooling. While powerful actors promoted market-based education reforms for decades, it is only in the past 25 years that they have become a widespread reality. In the years before this

recent popularity, struggles over racial segregation, the role of religion in schooling, and over an ideological belief in the supremacy of markets meant that market-based policies could not find a fit with local political contexts. However, as the political environment has changed, and as charter schools emerged as new hybrid model that could escape these legacies, the creation of markets in schooling occurred at a rapid pace — albeit with a vastly uneven geography. Indeed, as the cases of Oregon and Washington State illustrate, the terrain has shifted to the point where it has become difficult for states to resist the spread of market-based education reforms.

The continuing mobility of policies governing charter school markets is therefore an important element shaping their functioning. The long history of failed attempts to mobilize policies like vouchers and the ultimate success of charter school programs highlights how political struggles can have a profound impact on market-making projects, facilitating either their smooth roll out in eras when market rule is accepted, or immobilizing these projects when resistance is strong. Such mobilizations do not end once policies are adopted however, but rather continue on as powerful actors attempt to reshape existing markets to fit with their preferred vision or, in Fligstein's (1996) terms, conception of control. This history reflects the arguments of Block (2011) and Burawoy (2003) that market-making is a hegemonic project that is able to, at times, roll over opposition through the instillation of a market common sense.

Beyond these broad strokes however, the particularities matter, with market-based education reforms only taking off once they were able to break free from their associations with racial segregation and/or the funding of religious schooling. Fitting in with the educational values discussed by Rizvi and Lingard (2010) was a key element in this — voucher policies were not able to achieve the popularity of charter schools in part because they did not exhibit a fit with these values. Thus, charter schools as a policy option were forged through political struggles,

presenting a hybrid market approach that was able to bypass the conflict that had marked attempts to mobilize voucher programs.

Furthermore, even in an era of market rule the smooth roll out of markets, especially markets in the libertarian image, was not assured. While in places like Michigan this roll out occurred relatively unimpeded, in Oregon strong resistance meant that their charter school markets became characterized by a system of local control over entry into the marketplace. Struggles over markets and the ways in which they articulate with a state's political context are an important element in shaping their form, serving to immobilize elements of even highly mobile policies. Market-making and market-shaping policies are, like other policies, therefore shaped by the spatial relationships used to move them; a fact that can have a large impact on the differential functioning of markets across space. Importantly however, the stability of these variations in market forms is far from certain, with powerful actors often working to remove any barriers that keep markets from functioning in their preferred manner.

Charter school markets are therefore powerfully influenced by their place within the circulation of ideas, power, and money that have led to their creation and have continually reshaped them. This says much about the ways that markets, especially ones so closely linked to government policy, must be understood within the context of the mutable act of mobilizing policy; an act that is, of course, shaped by the particularities of the sector being marketized. In schooling, this has meant that the values ascribed to education have shaped the movement of policy, helping prevent the spread of voucher programs in past decades and thereby leading to the creation of charter school policies as a hybrid option. Within a conception of markets as struggle then, political struggles over markets are not restricted to the space of the market itself,

or even the immediate institutions that surround exchange, but are enmeshed with the geographies of power and expertise mobilized to shape markets in particular ways.

Chapter 5: Conceptions of Control: Libertarian Markets and Local Power

As outlined in Chapter 4, Michigan and Oregon's charter school markets have significant differences. Most notably, charter schools make up a much larger proportion of the state's total enrolment in Michigan (9.2%) than Oregon (5.1%²⁵) (*Public Elementary/Secondary School Universe Survey*, 2015). The two states' markets also have vastly different urban profiles with charter schools heavily concentrated in Michigan's major cities while being much more dispersed in Oregon.²⁶ Conversely, Oregon's system has a large proportion of online charter school students while these schools enrol under one percent of Michigan's charter school students (Michigan Department of Education, 2017). These differences exist despite the common pressures to move towards 'best practice' models of charter school governance discussed in Chapter 4. This chapter therefore zooms in past the national scale to outline the politics of charter school markets in both states. In doing so, I explore how and why these states have continued to diverge, focusing on the ideologies that have shaped the political struggles around charter school markets in each state.

In focusing on these politics struggles, this chapter describes how the governance structures of charter school markets in each state embody the different ideologies mobilized in their construction and maintenance. In both Michigan and Oregon the continual evolution of charter school markets has been guided by a dominant ideology that has set the terrain within which market struggles occur. In Michigan, a strong libertarian base at the state level has shaped

²⁵ Depending on your definition this number may be lower. These figures include single-district schools that reconstituted themselves as charter schools but which remain the only brick-and-mortar school in the community.

²⁶ 47% of students in Michigan's largest city, Detroit, attend charter schools (*Michigan Department of Education*, 2017) compared to 3.9% of students in Oregon's largest city, Portland (*Oregon Department of Education*, 2015).

much of the politics over charter school markets. In Oregon, the principle of local school district control has been repeatedly defended against the nationally-dominant, multiple authorizer approach to governing charter school markets. Importantly, this is not to say that these are the only ideologies that have shaped the evolution of each market, but rather that they have set the ‘rules of the game’ for these markets, and thereby serve as what Fligstein (1996) refers to as conceptions of control which provide an order to a market. This means that any challenges to existing market structures have had to factor in the strength of these principles and the power of the groups behind them. As such, these conceptions of control do not guarantee market stability but rather can be more accurately conceived of as a central feature over which struggles over markets are fought.

This argument will be made in three parts: (1) the history of charter schools in Michigan and the role of a libertarian market ideology in shaping how markets operate in the state will be reviewed; (2) the history of charter schools in Oregon will be examined, especially the struggle over integrating virtual charter schools into a system largely characterized by local control; and, (3) the histories of charter school markets in both states will be put into conversation in order to highlight what they can tell us about markets in general and schooling markets in particular.

5.1 Michigan: Libertarians, market liberals, and a fragile consensus

From the beginning, Michigan’s movement towards school choice policies has been characterized by a strong ideological belief in the efficiency of markets. As briefly recounted in Chapter 4, Governor John Engler was the driving force behind the state’s 1993 charter school law, viewing charter schools as a market-based policy that could bypass both the constitutional amendment against religious schooling and a general lack of support for voucher programs.

Long-time charter advocate with ties to Engler, James Goenner (2011: p. 45), leaves little doubt about Engler's motivation, writing that:

the origin of Michigan's charter schools policy can be traced to the economic and political philosophies espoused by Smith (1776/1993) and Mill (1838/1991). The market-based orientation of Michigan's charter school policy can also be directly traced to the more recent writings of Friedman (1962) and Chubb and Moe (1990) and their advocacy for returning to a market-based educational system guided by parental choice and competition.

This ideological belief has been an organizing force in Michigan over the last twenty-five years, with successive attempts to create schooling markets in the neoclassical image clashing with resistance and thereby creating new market institutions. Importantly, this resistance has rarely taken the shape of a clear struggle between pro-market forces and an opposing anti-market group. Rather, in a manner predicted by Fraser (2013; 2014), various market-friendly liberal groups have advocated for their own visions for schooling markets and at times aligned themselves with those on both sides of the market divide. Nevertheless, the clear influence of the neoliberal common sense of market efficiency can be seen in the state.

5.1.1 Governor Engler's market vision

The first step in moving schools in Michigan towards a market-based model came in the early 1990s when Governor John Engler undertook a complete remodeling of Michigan's school system. The charter school law briefly mentioned in Chapter 4 was only part of this project, with Engler also fundamentally reforming school funding and implementing a system of competition between public districts through the 'Schools of Choice' policy which set up a system where money followed students as they moved between school districts. Taken together, these policies

marked a radical change to public schooling in Michigan and a strong push towards governance through markets.

The changes to Michigan's school funding model, enacted through a referendum commonly referred to as Proposal A, were perhaps the key element in reshaping the state's public education system (Goenner, 2011; Lacireno-Paquet and Holyoke, 2007). Passed in 1994, Proposal A raised money for Michigan's schools through a new 2% sales tax, replacing the existing property-tax based, funding model. This money was used to fund a per-student 'foundation allowance' that followed students as they moved between schools, breaking from the previous system which had funded schooling on a district-wide basis. Proposal A was therefore consciously designed to place school districts and charter schools in competition by implementing a funding model that required schools and school districts attract and/or retain students in order to assure their financial viability. Engler made this link clear when arguing for Proposal A in front of the state legislature, stating that:

The total funding level of schools will be determined by how many students they can retain or attract. The schools that deliver will succeed. The schools that don't will not. (Engler quoted in Lubienski, 2001: p. 5).

By linking funding to competition for students, Proposal A set the stage for the rest of the changes that were to follow. As a member of the State Board of Education²⁷ put it, the foundation allowance ultimately "became a bounty on the head of a kid" that fueled competition between school districts and charter schools. Engler further entrenched this system of competition between schools a year later when the School Aid Act was amended to include the

²⁷ Member of State Board of Education, Michigan, 23 January 2015

new ‘Schools of Choice’ policy in 1994 (Goenner, 2011). This policy let districts choose whether to allow non-resident students to attend their schools. When combined with the foundation allowance, this meant that districts stood to gain or lose money based on whether they retained their own students and/or how well they attracted out-of-district students — thereby creating an incentive for local school districts to approach schooling as a market relation.

In addition to these changes to the funding model, Michigan’s charter school system was designed to be as close to the vision of a neoclassical market as possible under the limits of the state constitution. Michigan’s system allowed for multiple organizations to authorize charter schools which meant that, unlike in many other states, restrictions on opening charter schools were relatively lax because schools turned down by one authorizer could apply to another. Furthermore, authorizers were incentivized to charter as many schools as possible since they were allowed to keep 3% of the foundation allowance for each school they authorized. As one employee of a philanthropic funder of charter schools told me: “as an authorizer you take a 3% fee based on enrolment, so the market incentive of just figuring out how to authorize more schools is a lot of what is driving the market.”²⁸ Furthermore, Engler ensured that authorizers would look favourably on applications by allowing state-wide universities to authorize schools; because Engler appointed the boards of these universities, he was able to ensure that they would be supportive of the charter school movement (Goenner 2011; Lacireno-Paquet and Holyoke, 2007; Lubienski, 2001). As a whole, the implementation of Proposal A, the ‘Schools of Choice’

²⁸ Philanthropic Foundation Employee, Michigan, 6 February 2015

policy, and Michigan's charter school system, revamped Michigan's school system and created new competitive pressures on schools throughout the state.²⁹

Importantly however, Engler did not achieve a complete remodelling of Michigan's school system and his broader reform project suffered some setbacks. As established in the previous chapter, Engler and his allies viewed charter schools themselves as a compromise policy on the path towards a voucher system (Goenner, 2011; Lubienski, 2001). Indeed, the chairman of the group that funded the drafting of the law, TEACH Michigan, reflected on charter schools as only the first step of a grander plan, writing that Engler's reforms "have made it much easier to advocate extending the same financing system to independent schools" (DeWeese, 1994: p. 32). As such, charter school markets were viewed as a compromise policy — the best possible option given the political circumstances.

Furthermore, even this compromised move towards markets in education required the careful priming of a public that was hesitant to move away from the traditional public school system based solely on arguments of market efficiency. Notably, the coalition supporting charter schools relied on the creation of a crisis narrative in the public system, on depictions of an intransigent education bureaucracy, and on the argument that parental choice was a higher form of democratic control over schooling than elected school boards (Goenner, 2011; Lubienski, 2001). For example, Engler's 1995 *State of the State* address included a section on 'Building Educational Liberty' where he argued for the "liberty for parents to send their children to schools they deem the best" and stated he would undertake reforms that:

²⁹ It is for this reason that the Schools of Choice policy is often discussed alongside charter school markets with little distinction made between the two in this dissertation. The policies were introduced at around the same time and it is difficult to untangle the effects they have had on schooling in Michigan.

will seek to repeal the state School Code. Its replacement? A local Education Code that maintains accountability, but puts parents back in charge. That's one "outcome" we should all agree upon. It's time to stop controlling education from Lansing or Washington; it's time to start transferring full authority to parents and the schools they pay for! (Engler, 1995: para: 49).

Similarly, when introducing the charter school law in 1993 Engler recounted the story of Rory, an 8-year-old 'trapped' at his local school which did not meet his needs; stating that charter schools would allow Rory and other students the freedom to escape traditional public schooling (Goenner, 2011). These rhetorical moves helped to associate market-based education reforms with parental power and painted school boards and the education bureaucracy as anti-democratic when compared to choice exercised in a market (Apple, 2001; Cohen and Lizotte, 2015; Lubienski, 2003). This made the move to a market system about more than just efficiency of delivering a public service, but also marked it as a moral obligation to help children 'trapped' in poor schools. In making these arguments, Engler and other charter school supporters tapped into narratives around social mobility and democracy. These narratives were ever-present in the public statements made by Engler and his allies and, as discussed in Chapter 3, reflected the need to balance the competing demands placed on schooling with the creation of a market system (Goenner, 2011; Lubienski, 2001).

Even with this priming, the implementation of the charter school law was met with substantial resistance in Michigan. Supporters of public education, including the Michigan Education Association (the state's teachers' union), immediately launched a legal challenge on whether charter schools met the state's constitutional requirement that funding flow to 'public' schools. This lawsuit was not settled until 1997 when the Michigan Supreme Court ruled that

charter schools were, in fact, constitutional (Goenner, 2011). The threat of this lawsuit and resistance to charter schools from key bureaucrats such as the state superintendent were on the mind of those drafting the charter school law and affected the decisions they made; as Goenner (2011: p. 104) recounts, “[Engler] said it is important to understand that he and his team could not accomplish all the deregulation they desired.” These failures included a lack of a funding for charter facilities, which slowed their growth rate, and the inclusion of accountability measures which were put in the charter law in order to meet the definition of public under the constitution. Perhaps most notably however, in 1996 anti-charter groups were able to cap the number of charter schools which could be authorized by state-wide universities (Arsen et al., 1999; Lacireno-Paquet and Holyoke, 2007). Despite multiple attempts, Engler was never able to gather enough support to remove this cap and it helped limit the growth of charter schools in Michigan (Goenner, 2011).

Therefore, while according to people close to him and his own comments, Engler was committed to creating a system of schooling that would adhere as closely to the neoclassical vision of a perfect market as possible, resistance, struggle, and existing constitutional barriers shaped the actually-existing markets implemented through Michigan’s charter school law. The creation of markets for schooling were therefore forged through struggle even in a market-friendly state like Michigan — a struggle which shaped how those markets functioned. Thus, even though Michigan was a relatively permissive environment in the national context (as outlined in Chapter 4), political contestation played a key role in shaping its charter school markets.

Nevertheless, the ideology of market efficiency permeated the market institutions that were set up in Michigan. This included the system of multiple authorizers incentivized to charter

as many schools as possible as well as the revised funding model put in place under Proposal A. While resistance and institutional barriers shaped the actual-existing charter school markets in the state, they did so in response to a well-supported ideological vision that relentlessly drove market reforms. This was accomplished through conscious efforts to instill the neoliberal common sense of the market through a narrative of students trapped in failing schools with charter schools (rather than reforms within existing schools) as their only way out. Despite the fact that reshaping schools in Michigan occurred on a contested terrain, Engler and his allies were able to implement several policies that created a market within the publicly-funded school system and prime the ground for a further push towards markets; something that actors like DeWeese (1994) noted was always part of the plan.

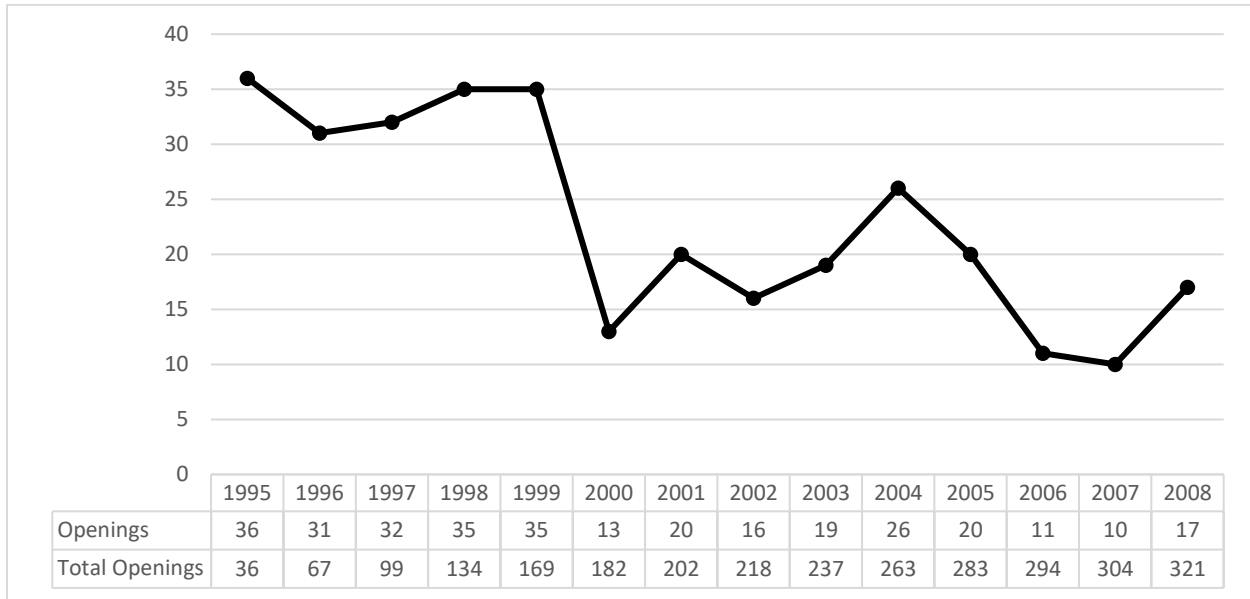
5.1.2 Libertarians, liberals, and the limits to reform

Following the implementation of the cap in 1997, the level of debate and legislative proposals surrounding charter schools greatly subsided. According to Lacireno-Paquet and Holyoke (2007) this was in part because an impasse had been reached between the pro-and-anti charter groups and in part because charter schools, which were limited by the cap, remained a relatively minor part of the educational landscape in the early 2000s. In 1999 only 2.8% of Michigan's students were enrolled in charter schools, growing to 4.1% by 2003 (*Public Elementary/Secondary School Universe Survey*, 2015). The cap on charter schools authorized by statewide universities likely kept a lid on this growth (Lacireno-Paquet and Holyoke, 2007) since, as can be seen in Figure 5.1 below, the number of charter school openings per year dropped dramatically once the cap was reached in 1999. Schools of Choice policies also remained a marginal policy intervention at this time with only 2% of Michigan students using the policy to cross school district lines in

2002 (Spalding, 2013). As such, market-based education reforms remained largely off the radar for the early part of the 2000s.

Figure 5.1 Charter school openings (number of schools opened) in Michigan by year from 1995 to 2008

(Centre for Educational Performance and Information, 2017)



As the decade wore on however, the reforms put in place in the 1990s became a larger part of the educational landscape. As multiple interviewees recounted,³⁰ this was in part because school funding could not keep pace with the rate of inflation once the state’s financial troubles caused a drop in the revenue gathered through the 2% sales tax. As one employee of a parent activist group told me:

what broke in 2007 was that the sales tax, expected/project revenue, collapsed. And they were talking in the spring and summer of 2007 of having to take back something on the

³⁰ Employee, Parent Activist Group, Michigan, 29 January 2015; State Representative, Michigan, 15 December 2014; Intermediate School District Superintendent, Michigan, 16 February 2015

order of \$375 to \$400 per pupil... for districts that are basically budgeted to break even, most of them don't have the capacity to absorb that sort of cut.³¹

This increased financial pressure on school boards in an austerity environment caused many to look at out-of-district students as a means of balancing their budgets, leading to a corresponding increase in districts participating in the Schools of Choice policy. According to the superintendent of an Intermediate School District, school districts began to compete for students when an austerity regime and heightened competition created a zero-sum game:

The policy has been there for Schools of Choice for quite a while, but as districts start to see their students leave, either to charters or other school districts then they have to change. Most of them have changed their policies on Schools of Choice and there are districts that up until the last two or three years hadn't accepted Schools of Choice students [that are] now entering into the competition because they need the students and they need the revenue... We've seen that a lot in the past few years.

[Q: Why only in the last few years do you think?] I think because of all the cuts that have been made at the state level in school funding. The fact that more and more districts are opening up so you have more students leaving districts... on top of all state cuts you are losing students.³²

Thus, the reforms that Engler put in place did not create a market for education solely by putting in place a new governance system, but required a mix of these reforms with an austerity regime

³¹ Employee, Parent Activist Group, Michigan, 29 January 2015.

³² Intermediate School District Superintendent, Michigan, 16 February 2015

that pushed school districts to participate in competitive behaviour. This highlights how markets never exist in isolation but are always embedded in their socioeconomic contexts, with market dynamics taking off strongly as funding became scarce rather than entirely through the demand of students for alternative educational choices.

Following this period of growth, the politics around charter schools and markets in education became active again in 2011 when Republican Governor Snyder replaced Democratic Governor Granholme. While Snyder prefers to think of himself as a technocrat rather than an ideologue (giving himself the label ‘one tough nerd’), his election opened a window for those supporting market-based education reforms to push for a new wave of changes. This included both libertarian groups and liberals with a belief in technocratic, market-based fixes.

Like in the 1990s under Engler, a strong belief in libertarian ideology has influenced many of the policies shaping education reform under Snyder. Notably, the DeVos family, which includes current U.S. secretary of education Betsy DeVos, has strongly advocated for minimal government involvement in schooling and sought to advance voucher programs in the state. Much of this influence has been channelled through the Great Lakes Education Project (GLEP) which the DeVos family founded in 2001 in the wake of a failed voucher referendum. While GLEP is devoted to advancing voucher programs, its monetary and political capital was essential to a successful campaign to lift the cap on university-authorized charter schools in 2011.³³ Indeed, GLEP and the DeVos family financed the electoral campaigns of many of the Republicans who voted to lift the charter school cap, with the *Detroit Free Press* reporting that 66 of the 78 of these legislators were directly funded by GLEP or by J.C. Huizenga, founder of

³³ GLEP employee, Michigan, 26 January 2015

the for-profit charter school chain National Heritage Academies (Jesse, 2014). Furthermore, in the subsequent primaries GLEP targeted Republican legislators who voted against removing the cap, pouring money into what one targeted legislator referred to as ‘the dirtiest campaign’ he had ever been involved in (Jesse, 2014).

This libertarian advocacy network has had a strong influence on education policy beyond simply lifting the cap. Notably, soon after taking office the Governor, in his special message on education reform, advanced his idea for an ‘Any Time, Any Place, Any Way, Any Pace Program’ which would have changed school funding to follow students on a course-by-course basis. He also advocated for legislation which would have required that all districts participate in the Schools of Choice program outlined above (Snyder, 2011). This proposal was married with a secretive ‘skunk works’ project where members of Snyder’s staff and Richard McLellan (who helped Engler draft the original charter school law) convened employees of both the Department of Education and charter school operators to meet in-person and over private e-mails (which are not subject to the Freedom of Information Act). This group discussed moving towards a voucher-type system by developing a ‘Michigan Education Card’ that students would be able to use to purchase access to individual courses, as well as the prospects of developing a system of low-cost, online schools that could deliver such courses (Clark, 2013; Skunk Works FOIA documents, 2013). Upon the revelation of this group and a corresponding backlash, Snyder ultimately distanced himself from ‘skunk works’ but the project and his first statements on education signalled a strong, and well-funded, advocacy network pushing towards a mix of libertarian education ideals and technological approaches to education.

This core of libertarian advocates for market-based education reforms were not the only players proposing changes to charter school markets however. Philanthropic foundations such as

the Eli and Edythe Broad Foundation developed a close relationship with Governor Snyder as he came into power. As discussed further in Chapter 6, these groups would play a large role in Detroit specifically, but also helped develop and fund Snyder's signature education reform: the Education Achievement Authority.³⁴ This project, modelled after New Orleans' recovery district, was mandated to take over schools which performed poorly on state-mandated tests (the bottom 5%) and provide them with 'turnaround' services to improve their performance. Importantly, this was also a favoured policy of the Obama administration and a central feature of Michigan's application for Race to the Top funding (Finances_Foundation, 2013; Mason and Arsen, 2014). The EAA attempted to realize this mandate by taking over low-performing schools and turning some over to charter operators while running others themselves. According to its advocates, the oversight of the EAA, when combined with the autonomy of charter schools, would improve educational outcomes.

Freedom of Information Act requests obtained by State Representative Ellen Cogen Lipton highlight how closely Broad worked with Governor Snyder's team to develop the project, with Broad Foundation employees on e-mail chains with Snyder's senior staffers as well as Department of Education employees (Finances_Foundation, 2013). This support included substantial material contributions including over \$10 million in start-up funds from the Broad Foundation as delivered through the Michigan Education Excellence Foundation, a non-profit

³⁴ The Broad Foundation provided millions in funding for the EAA. Furthermore, Eli Broad and his staff were in constant conversation with state officials regarding the EAA's priorities and in monitoring its progress. Broad himself wrote to the chief of the Education Achievement Authority, John Covington, with worries that he was understaffed and offering to help (Finances_Foundation, 2013: p. 102). His staffers were also in direct contact with Covington, asking him questions not only about funding but also about policy decisions and the relationship between the EAA and the Detroit Public School District (Finances_Foundation, 2013: p. 210).

designed solely to fund the EAA.³⁵ Rather than simply relying on market forces to improve education, these FOIAs reveal how the EAA's supporters viewed it as a method of linking school choice with a strict accountability regime. The EAA's strategic plan made this orientation clear, outlining that "[the] EAA will operate from the premise that increased autonomy linked to high accountability will yield the best performance results for children" (Finances_Foundation, 2013: p. 93). Rather than professing a belief in market competition alone then, the group of actors involved in the EAA believed that markets were only one component of needed reforms and that a test-score based regime was a necessary part of any charter school market. For example, in e-mails between a number of actors who would go on to set up the EAA, Lou Glazer wrote:

most charters are operated to get customers... if parents shop for other things than student achievement (safety, discipline, extra-curricular stuff, nice facilities, etc) you get schools that give the customers what they are looking for, that is why you need a system that combines the market with centralized standards (Highlighted Exchanges among Members of 'Excellent Schools Detroit', 2010: p. 38)

Thus, while many of these liberal groups supported lifting the charter cap, their engagement with the neoclassical ideology of markets was far more tentative than the groups associated with the DeVos family.

³⁵ Dennis Muchmore, Governor Snyder's Chief of Staff, was clear in his private correspondence that the Michigan Education Excellence Foundation was designed solely to fund the EAA. When writing to Detroit Public School's emergency manager Roy Roberts and others, Muchmore stated that "The Michigan Education Excellence Foundation was created for the purpose of assisting the EAA in developing a long term, sustainable system of schools and itself is answerable to those who are raising and providing funds to us for the future. We all want to make this as seamless as possible, but as with all foundation contributions, the donors will demand a somewhat more detailed accounting of the disposition of the donations to MEEF that are forwarded to EAA. In fact, they already have" (Finances_Foundation, 2013: p. 60)

Despite their impressive financial reach, both libertarian and liberal education reformers failed to implement their visions. This was in part because their ideological support for markets ran into opposition from a public still invested in the local institution of the public school. For example, libertarian groups put forward a series of proposals during the 2012 ‘lame duck’³⁶ session that would have drastically reshaped public education but which failed to garner legislative or public support. This included a proposal authored by Richard McLellan at the end of 2012 that would have put in place the Governor’s ‘Any Time, Any Place, Any Way, Any Pace Program’ by implementing the per course funding structure discussed above. McLellan’s proposal was never introduced to the legislature however and quickly became toxic after the ‘skunk works’ revelation (Livengood, 2017). Similarly, another bill, HB5923, which would have allowed private businesses to open charter schools and allowed charter schools to restrict student entry to their schools, failed to make it out of committee. These ideas, perhaps because of the climate of secrecy surrounding their development, were widely panned as anti-democratic and prioritizing profit over the needs of children. Notably, multiple Democratic State Senators reacted strongly to these bills, including Senator Hopgood, who asked “If the Governor is willing to make a profit off of our most precious resource – our children – what could possibly be off limits?” (Okemos Parents for Schools, 2013: para. 25). Even within a widely supportive environment then, there were limits to how far the market ideology could be advanced. Proposals that were blatantly linked to profit-making efforts (allowing businesses to open charter schools) or that did not fit within the ideal of a meritocracy (allowing charters to restrict entry) could not

³⁶ These are sessions held after an election but before new legislators take office and therefore where non-returning legislators can vote for legislation without fear of repercussions from the electorate. Because of the strict term limits in Michigan, there are always a large number of legislators in this position during ‘lame duck’ sessions and they are therefore are a period when controversial legislation is often passed.

gather support from the public, perhaps signalling tensions between the creation of markets and the educational values discussed by Rizvi and Lingard (2009).

During the same session, bills that would have expanded the EAA also failed in the legislature, although they did make it to vote. These bills were necessary for the EAA's expansion because, while the original plan was for it to be a state-wide district, it was first implemented through an Interlocal Agreement between Eastern Michigan University and Detroit Public School district (both of which had boards appointed by the Governor). The nature of this agreement meant that the EAA was restricted its operations to the Detroit Public School system and that it could not be expanded state-wide (Mason and Arsen, 2014).³⁷ The 2012 bills therefore sought to expand the EAA's reach and make it the reform district for all schools scoring in the bottom 5% of state-wide tests throughout the state. This proposal caused an uproar from parent groups which ultimately helped prevent its passing. As a Democratic legislator recalled:

[The EAA] bill was introduced last session, the last year of last session, and it sort of hit a wall.... they held a number of hearings and the more that the public learned about the state-wide school district, they weren't really happy with it. So, a number of grassroots groups organized.³⁸

This fierce resistance, often from suburban communities, meant that efforts to expand the EAA fell short and the Governor's signature education reform stalled. In this manner, both libertarian and liberal market supporters began to run into the limit of their agendas in the 2012 session.

³⁷ As Mason and Arsen (2014: p. 36) quote from the EAA's launching: "The system's initial operation will be in Detroit, where Detroit Public Schools (DPS) Emergency Manager Roy Roberts will create and publish criteria that will be used to place schools in the new district. The system will expand to include low-performing schools throughout Michigan."

³⁸ State Representative, Michigan, 15 December 2014

A key reason for the failure of both the libertarian and liberal agendas outlined above were the racial politics of Michigan, with suburban districts highly resistant to any policies which would desegregate their schools or which attacked their local public school system. For example, multiple interviewees recounted that Snyder's attempts to require all districts to participate in the Schools of Choice policy fell apart based on resistance from Detroit's richest suburbs who did not want to have to accept students from the city.³⁹ Facing this resistance, the Governor instead decided to offer a series of incentives to school districts if they participated in the program.⁴⁰ The bills also awakened resistance that had not been present when education reforms were limited to predominantly Black districts, a reminder of Lipman's (2011) assertion that coercion and consent operate differently depending on which community is targeted for reform. As a member of a parent organization who helped pushed back against each set of bills told me:

A lot of people realized, especially this thing about making school districts irrelevant [through Any Time, Any Place, Any Way, Any Pace], it was about the local high school that I know. A lot of people think 'oh charters are fine for all those poor people in Detroit, they need options, but what do you mean they are going to take away our high school?'⁴¹

Such resistance included parent groups coming to testify at the Education Committee, district superintendents and the State Board of Education writing letters against the proposed bills, and

³⁹ Employee, Parent Activist Group, Michigan, 29 January 2015; Charter School Advocate, Michigan, 18 December 2014.

⁴⁰ As the same Democratic legislator told me: "They basically cut about a billion dollars from the School Aid Fund, which is a segregated fund, and then they restored some of those dollars in the appropriations process but they called them 'best practices grants'...it was really a fund of money telling schools that they'll get it if they do certain things the way that the administration wanted school districts to act. So, one of the best practices was that you have to make your district a school choice district" (State Representative, Michigan, December 15 2014).

⁴¹ Employee, Parent Activist Group, Michigan, 29 January 2015

public forums across the state. The EAA in particular became the target of opposition, with Eastern Michigan University's Board of Regent's meetings disrupted by students taking over the space to demand the university pull out of the Interlocal Agreement and connecting this struggle against the EAA to the wider Black Lives Matter movement by staging a 'die-in' and chanting 'I can't breathe' in reference to the killing of Eric Garner by New York City police.⁴² While arguments that markets increased parental control had been successful in the 1990s, as the reality of what this meant for their local schools dawned on suburban parents, opposition grew and alternative ideologies of the school as a source of community were mobilized.

Ultimately, after Snyder's initial success in repealing the cap on charter schools in 2011, in implementing the best practice grants promoting the Schools of Choice program, and in using the Interlocal Agreement to set up the EAA, his reforms began to stall out. Snyder's signature reform, the EAA, is now universally characterized as a failure and the schools it took over will soon be returned to a reconstituted version of the Detroit Public School district (see Chapter 6). This decision was made after several controversies, including a scandal centred on the EAA's close connection to a technology company that used the EAA to test its incomplete software, sapped the EAA of its support (Guyette, 2015). Things have gone so badly for the EAA and Snyder that *Crain's Detroit Business* has referred to education reform as Snyder's 'kryptonite,' writing that "every time he touches the controversial and deeply emotional subject, something seems to go awry" (Livengood, 2017: para. 2) and with *The Detroit News* likening Snyder to Sisyphus pushing the boulder of education reform endlessly up a hill (Jacques, 2017). Most recently, the State Reform Office, which is under Snyder's control, backed down from its

⁴² Personal Observation, Eastern Michigan University, December 5 2014

announcement that it was considering closing 38 schools that had performed poorly on state-wide tests (Jacques, 2017; Livengood, 2017). This followed a number of setbacks to his plans to install an education commissioner over charter schools in Detroit — plans that were opposed by GLEP and which ultimately failed to gain support in the legislature (see Chapter 6 for more details).

None of this is to say that Snyder’s education reforms have been toothless. The changes put in place in 2011, augmented by the continuing shortfall in school funding and a wider austerity regime, have had a large effect on the shape of charter school markets. This is especially the case in Black communities where the number of charter schools have grown substantially under state-imposed emergency management. As can be seen in Figure 5.2 below, following the removal of the cap in 2011 there was a sharp uptick in the number of charter school openings. According to the philanthropists, charter school operators, and activists I interviewed, removing the cap fundamentally changed market dynamics in places like Detroit:

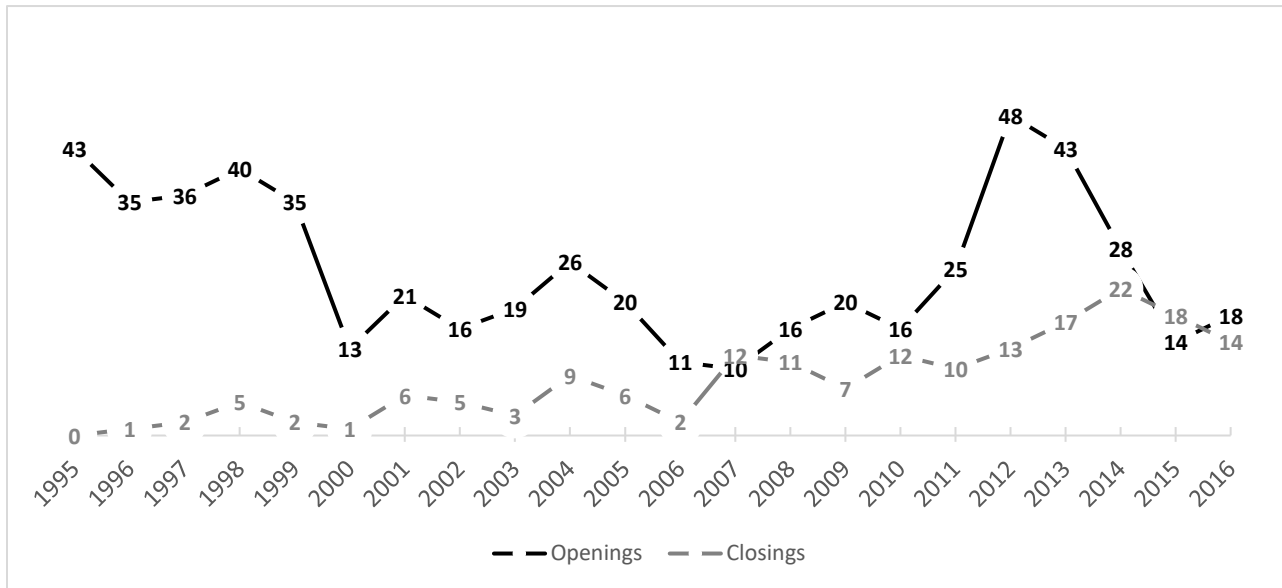
Before 2010 there was a certain cap on charter schools... So you saw a great deal of coordination. We’ve always had, multiple, a very large number of authorizers, when you removed the cap we started to see any sort of coordination go out the window. In one of our neighbourhoods we had nine schools that were on the list to open in one year.⁴³

The lifting of the cap increased the level of competition for students, causing not only more school openings but, as can be seen in Figure 5.2, an increase in the number of charter schools that faced closure as competition for students accelerated. Indeed, a review of the state of market dynamics in Detroit following the lifting of the cap described ‘cutthroat’ competition for students

⁴³ Philanthropic Foundation Employee, Michigan, 6 February 2015

where schools offer gifts such as sneakers and iPads in order to entice students to enroll (Innovation in Public School Choice, 2014). This placed increased pressure on local school districts who turned their efforts towards advertising as competition from charters grew and on parents and caregivers upon who faced the burden of navigating this chaotic landscape.⁴⁴

Figure 5.2 Charter school openings and closings (number of schools) in Michigan by year from 1995 to 2016
(Centre for Educational Performance and Information, 2017)



	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total Openings	36	67	99	134	169	182	202	218	237	263	283	294	304	321	341	357	382	419	461	489	503
Total Closings	0	1	3	8	10	11	17	22	25	34	40	42	54	65	72	84	94	107	124	146	164

The legislative session in 2012 has also had a large impact on the politics around charter schools which has, in turn, helped stall Snyder’s attempts to implement market-based education reforms. While prior to this session libertarian and liberal groups often worked together and had

⁴⁴ Suburban School District Board Member, Michigan, 22 January 2015

both supported lifting the charter school cap, the ramifications of the removal of the cap and an attempt to push further towards the neoclassical view of a market created tensions between the two. As a local Professor of Education familiar with state politics recounted:

I think that a real crisis emerged between the more centrist educational groups... and the more right-wing groups. And I think that this came about during lame duck in December 2012... when a very, this is the same lame duck that led to Right to Work, and you had a very strong push from sectors of the Republican party that were well to the right of Snyder basically looking at it as their moment. So that's the moment at which McLellan and Baird and others were pushing for a complete reworking of education and also the skunk works scandal, the idea of delivering education more cheaply, of unbundling education, really radical stuff... [at that moment] it felt like the centrist groups were saying whoa, now wait a minute, where are you going with this stuff. This isn't what we talked about.⁴⁵

Indeed, this schism became apparent when talking to members of both groups. According to one philanthropic foundation employee, the lifting of the cap caused them to reconsider their approach:

We believe in choice, but we also are also coming to see the effect of [choice], and being an advocate for, choice with guardrails. So we think there should be some regulation for quality, we think that there's a public responsibility. We think its a market dynamic... it's not a market without regulation. In Detroit, we purely pushed on the market strategy

⁴⁵ Professor of Education, Michigan, 2 February 2015

assuming that market dynamics will take care of itself, and there's too many competing dynamics for that.⁴⁶

While libertarian groups made the opposite argument:

They are talking, and have been for a couple years, about trying to create a common enrollment system. So whether this is voluntary or mandatory... I mean the difficulty of it is whether it is a service that assists parents, or whether it is a backhanded way to control choice. We don't support regulated choice, or managed choice. So if you have a common enrollment system, and they decide, some bureaucrat somewhere is deciding how many students should go to school x,y, or z: that's a problem.⁴⁷

This schism, with Governor Snyder in the middle, reduced the likelihood of further legislative changes, leaving the system enacted through the removal of the charter school cap largely in place. As will be further outlined in Chapter 6, attempts to move further towards the neoliberal view of markets ran into resistance both from parent groups who did not want to see their own public schools impacted and from liberal groups that switched their allegiances as the effects of Snyder's early reforms became clear. Conversely, attempts to reign in the 'cutthroat' competition in places like Detroit have been opposed by a well-funded network of libertarian groups. Paradoxically then, the level of contestation over charter school markets has resulted in an impasse that no one is happy with, where struggle is ongoing and no one is able to gain an advantage in ongoing reform debates.

⁴⁶ Philanthropic Foundation Employee, Michigan, 6 February 2015

⁴⁷ GLEP employee, Oregon, 26 January 2015

5.1.3 Stasis and chaos: The roll out of markets in Michigan

The history of the move towards market-based education in Michigan highlights how these markets have emerged through highly uneven power struggles and along racial and spatial lines. From the 1990s onwards a powerful network of libertarian advocates has sought to remake the delivery of schooling explicitly in the image of an idealized market. Since Governor John Engler first pushed for a charter school law there has been a consistent move towards creating charter school markets where there are few barriers to entry and where operators are able to function without restriction. This move towards a market ideal has not been monolithic however, with fractures appearing between this libertarian core and market-oriented liberals who have come to believe in a form of ‘choice with guardrails.’ Such fractures became most apparent when these liberals were faced with the ramifications of unfettered market competition after the lifting of the charter cap. Furthermore, the rejection of recent efforts to associate markets with the highest form of parental control has meant that parent groups and supporters of public school districts have been able to mobilize alternative ideologies of schools as a means of resisting the smooth roll out of policies such as Snyder’s ‘Any Time, Any Way, Any Place, Any Pace’ program or the expansion of the EAA. Parent groups have been able to argue for the importance of schools as sites of community building and as places antithetical to profit making in order to prevent further moves towards a market dominated by private actors. Importantly however, following a widespread pattern across the United States (Lipman, 2013; Scott, 2011) this has occurred unevenly along racial lines, with white suburban school districts being able to successfully resist the imposition of market rule.

The history of markets institutions in Michigan also illustrates that the roll out of market institutions does occur over a blank slate. Markets are built on existing institutional histories and

those being challenged by market-making projects speak back, reshaping their form. In the 1990s the constitutional amendment against funding religious schools and the constitutional definition of a ‘public school’ meant that charter schools in the state of Michigan had to remain accountable to a public institution, even if those institutions ended up being state-wide universities with boards appointed by the Governor. In the decades that followed, resistance efforts shaped how markets grew and operated. The cap on charter schools and the decision of school districts not to opt into the Schools of Choice program meant that the market-based governance of schools remained a relatively marginal intervention for close to a decade. The further expansion of markets in the early 2010s required state power as the removal of the charter cap was paired with funding incentives pushing school districts to participate in the Schools of Choice program as well as the direct takeover of schools through organizations like the EAA. Even still, the growth in market ideology in shaping charter school markets met its limits (at least for now) when state actors attempted to move the most extreme market-oriented policies from marginalized communities to the state as a whole; highlighting the unevenness of how markets are created and how they interact with other forces such as white supremacy (more on this in Chapter 6). While these struggles occurred on uneven terrain with powerful actors able to promote their chosen policies, the institutions that have governed Michigan’s charter school markets over the past 25 years have undoubtedly been shaped by state-level political struggles.

Nevertheless, despite this resistance, the overall arc of Michigan’s charter school system reveals how the ideology of market efficiency has been the guiding force in its development. What has been illustrated above then, is that this arc is not smooth, nor is it inevitable. Contradictions and struggle are rife in markets and the history of Michigan’s charter school markets are impossible to understand without paying attention to the back and forth nature of

these conflicts. Indeed, as the libertarian market ideology has repeatedly been pushed forward it has, in the manner predicted by Polanyi, elicited a countermovement as even those who are largely supportive of markets balk at their worst effects. These struggles, and the different governance structures created through them, have real effects. In the most basic terms, this can be witnessed in the simple statistics of charter school openings and closings in Michigan and the huge impact lifting the charter school cap has had on the operation of charter school markets. The politics of markets, and the power relations that shape these politics, matter.

5.2 Oregon: Corporate challenge to union power

When compared to Michigan, Oregon's charter school market presents a stark contrast. While both states were connected to similar national networks when they adopted their charter school laws, the libertarian belief in the power of competition played a much weaker role in the construction of Oregon's charter school system. Instead, the charter school markets in Oregon can best be understood through their emphasis on local control, with school districts in charge of authorizing new charter schools within their boundaries. This system of governance has meant that there are very few national or for-profit charter school chains in the state. It has also meant that charter schools have not come to dominate a single area to the extent they have in cities like Flint or Detroit. This system is not absolute however, with national, for-profit virtual charter schools like K12 Inc. and Pearson Education's Connection Academy finding loopholes that have allowed them to grow rapidly. As such, the evolution of Oregon's charter school system reveals much about how actors can disrupt stable market arrangements and how existing power structures react to this disruption.

5.2.1 Oregon and the principle of local control

As briefly recounted in Chapter 4, the genesis of Oregon's charter school law differed greatly from Michigan's. Although the libertarian Cascade Policy Institute and others pushed for a charter school law that allowed multiple authorizers, opposition from anti-charter groups resulted in a law which enshrined a principle of local school district control over charter schools. Multiple interviewees attributed this outcome as, at least partly, the result of the strong influence of the state's teachers' union, the Oregon Education Association (OEA). This is perhaps unsurprising since the OEA is one of the largest funders of state legislators (Mirk, 2011). Indeed, attempts to pass a charter school law in Oregon had failed in 1995 and 1997 due to their opposition (*The Oregonian*, 1998b). It was only in 1999 when Republicans had a rare moment of control over the legislature that a charter school law was able to pass through the legislature. However, the shape of this law, and of the market it set up, was the result of negotiations between the Democratic Governor Kizthalber and Republican legislators. While Republicans pushed strongly for a multiple authorizer system and for the ability to hire unlicensed teachers, Kizthalber was resistant to any law that included these requirements and threatened to veto any bill that contained them (*The Oregonian*, 1999a; *The Oregonian*, 1999b; *The Oregonian*, 1999c). In the end, a compromise was reached where local school districts became the only entity that could authorize a charter school but where charter schools could appeal to the State Board of Education if they were turned down.⁴⁸ This ensured that school districts would have a strong system of control over the spread of charter schools within their geographic boundaries.

⁴⁸ Currently the State sponsors only four of the 126 charter schools in Oregon.

Following the passage of the law, charter schools became part of the Oregon schooling landscape but did not achieve widespread growth. Five years after the passage of the law in 2004 there were only 56 charter schools in the state enrolling 5009 students, under 1% of Oregon's total enrolment (*2004-05 Statewide Report Card*, 2005). The system of local control was an important reason for the slow pace of growth. Placing school districts in charge of the authorizing process within their boundaries meant that they held a tremendous amount of power over charter schools. This is because school districts do not only decide whether charter schools can open but are also in charge of designing the framework through which they judge charter school applications. Indeed, I was told by a senior bureaucrat at Portland Public Schools that it would be very difficult for a for-profit company or large non-profit chain to make it through their process since they place a strong emphasis upon a school's connections with the local community in their evaluation system.⁴⁹ A state administrator drove this point home, saying:

In Oregon, our primary authorizers are school districts and school districts have a lot of power in early stages of an application getting approved or not.⁵⁰

Simply put, if an organization wants to open a charter school in a school district they must go through the process that the local school district has implemented. It is only if they are turned down that a charter school can appeal to the State Board of Education, where there are no guarantees of approval.

Another barrier to the growth of charter schools in Oregon is the funding dollars they receive. Part of this is because Oregon's per-pupil funding for all schools, public or charter, is

⁴⁹ Administrator, Portland Public Schools, Oregon, 2 July 2015.

⁵⁰ Employee, Oregon Department of Education, Oregon, 18 June 2015.

\$1,100 less than Michigan's (2014 Public Elementary–Secondary Education Finance Data, 2014). Specific to charter schools, however, is that school districts in Oregon keep a larger share of the state's per-pupil funding for charter schools than in most other states: this includes all Title 1 funding⁵¹ and up to 20% of per-pupil funding for elementary school students and up to 5% for high school students (Study of Oregon Charter School Funding, 2015). This was listed as a factor which has kept large, national chains out of state by many interviewees, with a school district administrator noting that:

[large national chains stay away] because of our funding model... In Oregon the minimum amount of pass-through dollars that go to charter schools are 80% of the state per-student school funding allocation for K-8 and 95% for high schools. It is much, much lower than other states... It is probably not worth their time.⁵²

Importantly, this funding model and, indeed the law itself, was the result of compromises between the two parties:

What I have heard from people who were part of writing that law, that was what they could all agree to. It was fairly arbitrary, people were just trying to find an agreement on something... you've probably noticed that every full session since then I think, there has been a bill to try and address charter school funding.⁵³

Thus, the political compromises made on school funding in 1999 between a Democratic Governor and a Republican legislature has helped restrict entry of large chains to the state and thereby shaped the market.

⁵¹ Title 1 funding is federal funding for schools serving low-income students.

⁵² Administrator, Portland Public Schools, Oregon, 2 July 2015

⁵³ Administrator, Portland Public Schools, Oregon, 2 July 2015

Together these two factors have meant that Oregon's charter school system differs greatly from Michigan's. As highlighted in the introduction, Oregon (5.1% in 2013-4) has a lower proportion of students attending charter schools than Michigan (9.2%) and a far less urban profile. The two systems are qualitatively different as well. While one of the most commonly quoted facts about Michigan's charter school system is that it has the highest level of for-profit operators in the U.S. (Kain, 2011), Oregon's charter school system is characterized by the absence of not only for-profit chains, but of national charter school chains altogether.⁵⁴ This has been the result of both the conscious construction of a system that enshrines local control and a side-effect of an arbitrary compromise on how charter schools are funded. Clearly, the struggle over the charter school law at the time of its implementation has greatly impacted the evolution of Oregon's charter school markets.

Importantly however, the longstanding effects of the initial charter school law have not been simply the result of its unimpeded functioning, but rather of political efforts to preserve Oregon's system of local control. Since 1999 there have been multiple attempts to alter Oregon's charter school law in order to better fit the circulating best practices discussed in Chapter 4. As with the implementation of the charter school law, these struggles have largely occurred along partisan lines. The past decade illustrates the nature of this struggle, with Democrats using their control of the Oregon House and Senate to stymie any legislation which would have altered the existing charter school system and Republicans able to use an even split of the House in 2011 to

⁵⁴ Only 8% (10 out of 125) of charter schools in Oregon are run by a Charter Management Organizations or Education Management Organizations. In Michigan this figure is 82% (*National Alliance for Public Charter Schools*, 2017).

participate in deal-making which allowed some minor changes to the charter school system. As a state legislator recounted about the 2011 legislative session:

There is a very divisive line between those... who support [charter schools] and those who think they need to go away. That line is very bright and it's also based on the numbers in the building.... so when you had thirty of each party and it takes thirty-one to pass a bill, anything we did came out as being bipartisan... the majority of bills were bills that the Democratic governor wanted and a handful of bills were bills that Republicans felt strongly about. They were around open enrollment, charter schools and who could authorize charter schools.⁵⁵

These changes did not result in a dramatic shift in the charter system but did somewhat reduce the power of local control by allowing Institutions of Higher Education to sponsor charter schools (Hunt et al., 2011).⁵⁶

That Oregon's system of local control has remained largely in place can therefore not be read as the result of inaction, but as continual action to preserve this market structure in the face of pressures to change; illustrating that the national circulation of policy models described in Chapter 5 are continually brought to bear on state-based variations from the norm. As a state administrator reflected:

When [the charter school law] was originally written and during that time, and [as] I think has [been] maintained since then, the local control, where a lot of the people, both legislators and school lobbyists and various organizations, they want the power to stay with

⁵⁵ State legislator, Oregon, 14 July 2015

⁵⁶ Although it must be noted that they have yet to sponsor a single charter school.

the local school district... I think there are also some folks out there who really advocate for charter schools to be a component of a school district to ensure that extra infrastructure for accountability and oversight.⁵⁷

Arguments to expand the reach of charter schools and to break the system of local control have therefore run into strong resistance efforts which have largely stymied attempts to restructure charter school markets. This has meant that charter school markets in the state have functioned in a very different manner than in other parts of the country but only because there have been active efforts to preserve their system of governance.

5.2.2 Eluding boundaries: Local control and virtual schools

The political protection of Oregon's system of local control has not meant that charter school markets in the state have remained static however. Virtual charter schools, which allow students to attend school entirely online, were not envisioned when Oregon's charter school law was passed in 1999 and have proven to be a challenge to the existing system. While only 0.5% of charter school students in Michigan attend virtual charter schools, in Oregon they educate 27% of such students. Within this group 71% of students attend only two schools, Oregon Connections Academy (ORCA) run by Pearson Education (3,558 students in 2014) and Oregon Virtual Academy (ORVA) run by K12 Inc. (1,750). Notably, both schools are run by for-profit, national charter school operators, a rarity in Oregon. The manner in which these schools have been able to carve out a niche in Oregon is instructive in understanding how actors probe market structures for profit-making opportunities, how a market actors react to such challenges, and the role of space in both processes.

⁵⁷ Employee, Oregon Department of Education, Oregon, 18 June 2015

ORCA and ORVA pose a challenge to Oregon's system of local control because the system's design did not anticipate how technological change would allow actors to bypass district control over schooling within their boundaries. Because virtual charter schools can enrol students from throughout the state while locating their head office in any location, they have been able to bypass opposition to their presence by enrolling students from a distance. Through the use of technology, online schools are able to enrol students living with the boundaries of a school district like Portland while being governed by a school district located on the other side of the state. The State Board of Education made the nature of this mismatch clear in a 2009 report addressing the challenge of virtual charter schools, writing that:

[in 1999] the charter school law did not anticipate online operations and did not address that possibility. Although legal, online charter schools do not fit well within the charter school framework as it was designed. Online charter schools can enroll students around the state, possibly without limit (*Online Learning in Education*, 2009: p. 4).

The Oregon charter school system, which was largely designed around the ability of a school district to control schooling within their geographic boundaries, was not set up to handle online charter schools that could enroll students throughout the state while being authorized by a single school district. In effect ORCA and ORVA found a way around the strong spatial delineation of market boundaries that defined charter school markets in the state and used it to bypass a system designed to prevent their presence.

This outlier dynamic became apparent almost immediately after the Oregon Connections Academy (ORCA) opened its virtual doors in August 2005. ORCA chose to locate in the Scio school district, which had only 696 students in the year prior to ORCA's opening, while advertising its services to students throughout the state. Scio, in turn, agreed to keep only 5% of

state funding rather than the 20% allowed by state legislation, increasing the profit margin for ORCA. For a tiny school district like Scio, 5% of the state's funding for ORCA's thousands of students represented a potential windfall given their small size. On the other hand, ORCA's ability to locate anywhere in the state granted it negotiating power over school districts when seeking a deal.⁵⁸ This meant that, in contrast to the brick and mortar system where the district held all the power in negotiations, with the online model ORCA could take their offer to multiple school districts and thereby gain leverage. This approach was an anathema to the education establishment in Oregon. As an administrator with Portland Public Schools put it:

One of the questions is, and one of the things that ORCA testified about... is that they essentially put out an RFP for sponsorship. And to us that seems very counterintuitive to the process of charter school application and the purpose of charter schools. It is definitely different than the process that usually happens. So I think a lot of us are just questioning, 'what does it mean when a school can put out an RFP for sponsorship.'⁵⁹

This mismatch between a system of local control and the functioning of an online school able to elude school district boundaries was therefore perceived as a threat to the existing market order.

While ORCA was able to break into Oregon's system through this loophole, its continued presence depended on a political struggle against those opposed to its schooling model and the challenge it posed to Oregon's system of governance. Indeed, immediately after ORCA was announced, the state legislature passed SB1071, which would have brought ORCA within the system of local control by mandating that 50% of a virtual charter school's students be from

⁵⁸ Negotiating power it would use to move in 2015 to Santiam County School District which agreed to pass along 96% of state funding (Albany Democrat Herald, 2015)

⁵⁹ Administrator, Portland Public Schools, Oregon, 2 July 2015

the district that sponsored the school. Ultimately, however, ORCA launched a successful lawsuit by arguing that its charter predated the legislation and therefore the law did not apply. Over the next few years other schools, including K12 Inc's Oregon Virtual Academy (ORVA), were able to gain waivers from this law.

ORCA and ORVA's continued presence set off a series of legislative battles over the next decade. SB1071 was only one of many attempts to bring the two schools within the system of local control or, at least, to alter the system to recognize ORCA and ORVA's state-wide nature. In 2009 for example, SB767 enacted a moratorium that capped existing virtual charter schools at their current number of students as the State Board of Education reviewed how to govern virtual charter schools in the state. This moratorium did not last long however, as the shift of power in the 2011 legislature outlined above resulted in the lifting of the moratorium and the removal of the 50% rule put in place through SB1071. As told by participants on both sides of the issue, these changes to the legislation on virtual charter schools passed because they became a bargaining chip in a greater legislative compromise that followed, with the Democrats trading the lifting of the home district cap in exchange for Republican support for the Governor's workforce development plan.⁶⁰ This changed the dynamic of the system and allowed virtual charter schools to continue to grow, largely settling the issue of the existence of these schools. Since then proposed legislation has largely been defensive in nature. For example, HB3660 which prevents a school district from having more than 3% of its students attend virtual charter schools and HB2301 which requires that virtual charter schools have 95% of their courses taught by teachers certified in Oregon.

⁶⁰ State legislator, Oregon, 14 July 2015; OEA representative, Oregon, 15 July 2015

The presence of ORCA also spurred the creation of an alternative online school housed within the public system. In 2005 when ORCA was announced, SB1071 also provided funding for the creation of the Oregon Virtual School District (OVSD) by the Oregon Department of Education. OVSD was designed to help stymie the loss of students to virtual charter schools by providing online services to teachers and students within the public school system. This option was not widely taken up and, according to one lobbyist, did not receive much support at the state level.⁶¹ In 2010, a second attempt to create a public alternative to for-profit online schools was made by the Northwest Regional Education School District with the support of a number of organizations including the OEA.⁶² These groups launched two charter schools under the Oregon Virtual Education (ORVED) umbrella (ORVED-East and ORVED-west) that were designed to work with the public system by offering individual online courses to public school students through intergovernmental agreements. This was consciously done in order to compete with ORCA and other for-profit online schools, with their pitch to school districts including the following quote:

The question isn't will your students take courses online, the question is will it be a program that works with and supports public schools or a for-profit company that only cares about the bottom line (Ballance, n.d.).

Rather than seeking to only limit ORCA and ORVA through legislation, opponents who sought to preserve the system of local control also attempted to create market alternatives that kept

⁶¹ Lobbyist, Oregon, 10 July 2015

⁶² The Board of Directors includes employees of OEA, the Confederation of School Administrators and the Oregon Association of Education Service Districts.

students interested in online education within the public system. However, as can be seen in Table 5.1 below, the two large, for-profit schools have continued to dominate the market.

Table 5.1 Virtual charter school enrollment in 2015 (Oregon Department of Education, 2015)

School	Enrollment	Market Share
Oregon Virtual Education – West	49	0.65%
Silvies River Charter School	116	1.53%
Sheridan AllPrep Academy	120	1.59%
Paisley School	221	2.92%
Metro East Web Academy	368	4.86%
Clackamas Web Academy	425	5.62%
Baker Web Academy	730	9.65%
Oregon Virtual Academy	1776	23.47%
Oregon Connections Academy	3763	49.72%

The legislative proposals and newly-created alternatives outlined above witness that the challenge ORCA posed to the system of local control was met with a political response designed to preserve the market’s shape. Crucially however, ORCA’s presence was not the result of careful negotiation into the existing system, but rather of ORCA shifting the market through its actions. Indeed, by simply appearing on Oregon’s charter school market, ORCA set the terrain for how virtual schooling was delivered in the state. As I was told by an OEA representative, this move defined the market for virtual education in Oregon:

Q: How much of virtual education in Oregon has been shaped by ORCA being the first form it was available through?

A: 99%. I think we are pushing back and playing defence. But they got to own the landscape.⁶³

While the market that was set-up through Oregon's charter school law emphasized local control, ORCA was able to use the fact that the original charter school law did not anticipate the presence of virtual charter schools to challenge this market structure. This made attempts to restore local control difficult.

The challenge in bringing ORCA and ORVA within the system of local control was, as many recounted, in part because once ORCA opened, it became almost impossible to change their status. This was because the optics of closing a school were unappealing to many representatives, illustrating that the importance given to schooling also acts a resource for pro-market groups. As a former member of the State Board of Education told me:

Politically, it is very hard, trust me, to shut down a school once it has started. I mean legislators do not have the stomach to close schools. So, I mean once you've got a school with real people and say shut it down...⁶⁴

As such the changes sought by those opposed to the growth of virtual charter schools were mostly defensive in nature. ORCA's initial presence changed the market realities and this made restoring the previous system difficult. As the State Board of Education's report in 2009 noted, if those who had written the charter school law had foreseen virtual schooling as an option, provisions would have put in place to prevent these schools from opening in small districts

⁶³ OEA representative, Oregon, 15 July 2015

⁶⁴ Former member, State Board of Education, Oregon, 15 June 2015

where they held the balance of power. Nevertheless, because these provisions did not exist, ORCA was able to seize a place in the market and change its dynamics.

While closing down virtual charter schools was politically unpalatable, there have been continual attempts to reconstruct the governance of Oregon's charter school market to reflect the change they represent. This has taken the shape of multiple proposed bills meant to address the mismatch between the system of local control and the reality of state-wide online charter schools. As far back as 2010, the State Board of Education proposed requiring that virtual charter schools operating on a state-wide basis be approved by the State Board of Education. While never enacted, similar proposals have been made to the state legislature over the years. This has included multiple task forces studying the issue (2009, 2012, 2017) as well as bills in 2015 and 2017 proposing that governance of virtual charter schools be moved to the State Board of Education if their enrolment exceeds that of the chartering school district. These bills have been designed to reshape the market's system of governance to accommodate the difference that ORCA and ORVA make. As David Williams of Portland Public Schools testified to the House Education Committee in 2015:

We think there really are two fundamentally district types of entities operating virtual charter schools in the state. One type is more of a local or regional approach... Another is really a state-wide charter school, a state-wide virtual charter school. There are several of these in the state that operate very large systems... We think that creates a fundamental difference in how we operate oversight and accountability in the state of these schools and therefore we have a bill before you that changes this oversight (*Public Hearing, HB3044-2015, 2015*).

ORVA argued against this characterization however, with their lobbyist arguing “one could look at the small districts of Oregon much like Washington D.C. looks to the states as incubators of change and as opportunities for new and innovative thought and action and implementation” (*Public Hearing, HB3044-2015*, 2015). Ultimately however, the status quo has prevailed as legislators have shown little reluctance to take on either the virtual charter schools or supporters of traditional public schools.

5.2.3 Stability, disruption, and space

The legislative battle over the place of virtual charter schools in Oregon illustrates the dynamic nature of markets. While the principle of local control has been a guiding force shaping how charter school markets have operated in Oregon, existing market orders can be challenged. That ORCA was the first to do so illustrates the incentives for profit-seeking actors to probe market structures for loopholes they can exploit or to rework those structures to their advantage. This is hardly a surprise — however, this dynamic is a curiously underrepresented aspect of the emerging geography of markets. Indeed, Christophers (2015) has argued that geographers must better understand the way that capital works to shape and reshape market structures if we are to understand the relationship between the micropolitics of markets and the macrostructures of capitalism. While Christophers does so as a corrective to studies of markets which focus on their fragility, in Oregon’s charter school markets profit-seeking was actually a force disrupting the existing market order. This is important because the shape of Oregon’s market constituted a barrier to capital accumulation, raising questions about the ability to preserve market orders that privilege principles other than the circulation of capital. As the difficulty in bringing ORCA and ORVA under the power of the existing system seems to signal, the stability of such markets depends on political struggles over market structures.

The role of space in the functioning of Oregon's charter school markets also played an interesting and important factor in maintaining and disrupting the system of local control. Oregon's charter school markets remained closed to national and profit-seeking actors because its system tightly bound the governance of these markets to a well-defined geography: the school district. However, as technology challenged the integrity of these boundaries, Oregon's system was unable to adapt. As many geographers have noted (Berndt, 2013; Christophers, 2014c; Kama, 2014; Hall, 2015), the maintenance of such boundaries is integral to markets, allowing them to seem coherent and providing a locus of action. What is illustrated in the case of virtual charter schools is how politics and power can function differently as the scale of market action shifts and how market actors can use this to their advantage. For example, by ensuring that markets stayed locally-bounded through school district control, the market system in Oregon was able to keep profit-seeking largely in check; however, once the scale shifted to the state-wide level, pressure began to build and the ability to restrict for-profit firms from finding loopholes to exploit was limited. As discussed in Chapter 2, such scalar politics raises important questions over the role of space in struggles over markets, and about how fights over the scale of markets can work to advantage different actors. In this case the ability to define space became a central feature of the disruption of Oregon's charter school markets and attempts to reinstate the system of local control.

Finally, the ongoing contestation against the principle of local control continues to be an important aspect of the politics around charter schools in Oregon. While the relative power of the teacher's union and of the Democratic Party in the state have been able to largely preserve the strength of this principle, it has required constant maintenance. The disruption posed by virtual charter schools further illustrates that even seemingly stable market orders require preservation

as outside sources of power (circulating geographies of expertise, national-level for-profit operators, etc.) move into a market to challenge its structures. As highlighted in Chapter 4, this is an ongoing feature of these markets, as power is continually mobilized to reshape markets across the United States. The history of the evolution of governance structures of Oregon's market therefore continues to illustrate that the functioning of markets is shaped by the articulation of extra-local pressures with situated political dynamics.

5.3 Roll-out, resistance, and schooling markets in flux

Thinking across the Oregon and Michigan cases highlights how market structures come to embody the ideologies that have guided their creation. This, of course, is one of the central insights of the social studies of economization/marketization (SSEM) approach associated with Callon. To SSEM scholars, ideas about how a market functions are materialized in the actions of market actors, who construct markets that fit these visions through their decision making. In both Michigan and Oregon, ideologies such as the libertarian notion of how market should function or the principle of local control came to be reflected in market structures. However, in contrast, to the SSEM approach, and building on the work of Christophers (2014a) and Braun (2016), I have also illustrated the ways that these market-making actions are connected to broader power relations and the roles they play in both the circulation of capital and in supporting (or resisting) the ever-increasing power of market rule; the power of actors such as the DeVos family are therefore central to understanding why certain market structures win out over others.

That both markets have been sites of struggles even at their most stable moments also follows from the theoretical framework established in Chapter 2. What is interesting is that despite the common pressures described in Chapter 4, charter school markets in Michigan and Oregon have taken such drastically different shapes while ostensibly being a variation on the

same formula. The particular histories of struggle over each market, and the political and social contexts within which they have unfolded, are central to understanding how these markets function. This is because these conflicts are connected to the wider politics of each state, with the strength and wealth of the libertarian movement in Michigan pushing charter school markets in one direction, and the principle of local control and the importance of teachers' unions in Oregon moving those markets in the opposite direction. Viewed from this angle, charter school markets are just one arena through which ideological struggles in each state are manifested. By moving beyond nationally-circulating market discourses and zooming in on the particulars of state-based struggles over charter school markets, this articulation between the construction of charter school markets and state politics becomes clear.

It is also important to note that the conceptions of control of both markets were contested regularly, necessitating that those invested in the existing market order actively work to protect it. Again, these politics are not internal to each market, but must be understood as shaped by the geographies of power mobilized to challenge existing market orders. In Oregon in particular, the ability of the system of local control to withstand the push towards a multiple authorizer system and to adapt to the pressure of profit-seeking virtual charter schools has meant the mobilization of local actors in the face of outside pressures to change. This means that while the governance system of Oregon's market was largely stable, this stability required constant maintenance as actors like Pearson's Connections Academy probed the existing order looking for profit-making opportunities. Even in the relatively unrestrictive market for charters of Michigan, constant pressure was placed on the existing market order as new systems such as the unbundling of schooling on a course-by-course basis (the 'Any Time, Any Place, Any Way, Any Pace Program') were put forward to enable new avenues of capital accumulation.

In both cases, spatial relations were key to the functioning of the market. At the most obvious level the fact that charter school policies are established at the state level is what enables the differences between the two states — setting the scale of market governance. The system of local control in Oregon is an extension of this process of territorialisation at a more local geography, with the institution of the school district serving as the site of market governance in the state. Spatial relations also played several less obvious roles however, such as allowing ORCA to bypass Oregon’s system of local control, or determining which communities were placed under market rule in Michigan. In both Michigan and Oregon then, space was not just important in delineating the borders of a market but in the fact that these borders and the ability to define them were themselves a site of struggle. The expansion of markets in Michigan to suburban communities, not the laws themselves, were what caused an anti-market backlash at the state-level, while scale jumping is what allowed ORCA to flourish in Oregon. Struggle does not just occur within spatially-delineated markets, but as Christophers (2014b) and Kama (2014) have argued in relation to pharmaceutical and carbon emission markets respectively, over their boundaries and the reach of market rule.

Finally, in both states the fact that these were markets for schooling mattered. The importance of schooling as a site of community and social mobility were mobilized by both sides of the market divide, illustrating Fraser’s (2013) point that there are no easy alliances between anti-market forces and emancipatory struggles. Nevertheless, in Oregon’s initial rejection of a multiple authorizer system and its defence of the system of local control, the idea that children’s education is not to be experimented with provided a discursive resource for those opposing charter schools. At the same time, while Engler and his allies promoted markets as the pinnacle of democratic control over schooling, the realities of the charter school markets in places like

Detroit placed a strain on the ability of market-makers to argue that their interventions were in the best interests of students and in promoting educational values of social cohesion and social mobility. As will be reviewed in the conclusion, whether this will lead to instability in the emerging educational settlement remains up for grabs. However, the history of charter school markets in each state illustrates the importance of these values in political struggles over these markets.

Chapter 6: Race, Power, and Schooling Markets in Detroit

The chapters up to this point have focused mostly on the interplay between market-making projects and place-based politics at the state level. In many ways this makes sense, with education policy set by state governments. Yet, despite a seemingly common policy environment, the spread of charter school markets has been highly uneven even within states. This can clearly be seen in the case of Michigan where charter schools enroll almost half the students in Detroit while many of the city's neighbouring suburbs remain largely charter-free. This chapter will therefore explore the factors that have led to these uneven geographies within Michigan with a particular focus on the Detroit metropolitan region. In doing so, it will explore the ways in which the racial politics of schooling in Michigan have shaped the emergence and functioning of charter school markets, ultimately building to an argument that markets must be understood as deeply embedded in the local geographies within which they exist and also as a key frontier through which these geographies are remade.

This argument will be made in four parts: (1) the political economy of the Detroit metropolitan region will be briefly reviewed; (2) the recent history of the Detroit Public School district will be placed in comparison to those of neighbouring school districts; (3) the specifics of the most recent struggle over schooling markets in Detroit and how this relates to wider struggles over the city will be described; and, (4) the lessons from this interaction between schooling markets, the racial politics of schooling, and the history of Detroit will be discussed.

Before this argument is made however, it should be noted that this chapter relies entirely on the Michigan case study to the exclusion of the Oregon case. The most important reason for this is because Oregon does not have a region or municipality where charter schools are as densely concentrated as Detroit (especially considering that over $\frac{1}{4}$ of Oregon's charter school

students attend online schools). This means that charter schools have had a much smaller impact on the production of local geographies in the state and, therefore, that the Oregon case does not provide the same level of insight into the local dynamics of markets as the Michigan case. Furthermore, given the urban orientation of this chapter and the fact that charter schools have largely been kept out of the state's largest city, Portland, comparison between the two cases would largely be a fruitless endeavour.

6.1 The political economic context of Detroit

Detroit, in both the up and down periods, has often been portrayed as the epitome of American capitalism. From the booming postwar era to the vast inequalities and disinvestment that followed and now to the displacement that has marked capital's selective return to the city, Detroit has been a stand-in for capitalism's excesses (Kinney, 2016). Importantly, Detroit's school system has not only paralleled the rise and fall of the city's fortunes, but also actively produced the patterns of white flight, disinvestment, and segregation that have shaped the city's history. For example, as Kang (2015) writes, when the racial demographics of neighbourhood schools changed in the city in the 1950s, white residents became less likely to approve the tax increases necessary to fund schools that were increasingly attended by the city's Black population. This created a cycle where, as more white students left the school system (and the city), white voters continually voted for disinvestment in schools, leading to an even greater exodus from these underfunded schools. In this section then, I will briefly review the historical and political economic context of Detroit in order to situate the current, market system of schooling within its political-economic context.

As Kinney (2016) writes, narratives of Detroit's industrial past have created a mythology of the city as a boomtown powered by the automotive sector. This narrative of Detroit as the

once “embodiment of a new version of the American Dream” continues to shape perceptions of the city as an American success story that fell into disrepair following what residents alternatively refer to as the 1967 Detroit riots or the Detroit rebellion (Kinney, 2016: xvii; Tabb, 2015). The reality of this decline cannot be disputed, with the postwar city of 1.8 million in 1950 now home to only 700,000 people (Reese et al., 2017) and with the city containing 80,000 abandoned residential properties in 2012 (Schindler, 2016).

However, as Sugrue (2014 [1996]) reviews in *The Origins of the Urban Crisis*, the common perception of the roots of Detroit’s decline in the 1967 rebellion and in the subsequent ‘mismanagement’ by the city’s Black leadership fails to capture the racist patterns of discrimination and the already-shifting manufacturing landscape that predated the rebellion. Sugrue highlights how an amalgam of government regulators, real estate interests, and homeowners effectively prevented the Black community from accessing stable housing and thereby laid the groundwork for the racially segregated city that exists today. For example, he reports that of the 545,000 housing units available in the city in 1957, only 47,000 were available for purchase by Black homebuyers. Furthermore, the virulent racism that characterized this period allowed real estate agents to engage in ‘blockbusting’ practices whereby the ‘threat’ of Black families moving into a community was mobilized to drive down house prices, which real estate agents would then flip in order to overcharge Black homebuyers desperate for housing. These racial fears combined with federal incentives for suburban development led to the large-scale movement of white residents out the city long before the rebellion of 1967.

Likewise, the shift of manufacturing to suburban and rural locations had already begun in the 1950s and was soon compounded by a loss of jobs to automation. Sugrue documents that Michigan’s share of auto manufacturing fell from 56% to 40% from 1950 to 1960 and that

between 1950 and 1956, 55 manufacturing firms moved out of Detroit to the outlying suburbs (see also Tabb, 2015). As Sugrue (2014 [1996]: p. 270) argues, while:

It is a commonplace assumption that Detroit's urban crisis began with the riot of 1967 and worsened with the inauguration of Coleman Young as Detroit's mayor in 1974... What has become of Detroit, however, is not the product of post-riot panic or the alleged misrule of Coleman Young. By the time Young was inaugurated, the forces of economic decay and racial animosity were far too powerful for a single elected official to stem.

The movement of jobs outside the city was therefore not the result of mismanagement by the city's Black leadership but of economic forces that predated them. Despite a mythology of Detroit's decline driven by violence and mismanagement then, Detroit's history was shaped by racial fears and economic forces that resulted in wealth moving out of the city and in sharply demarcated patterns of racial segregation.

Over the next several decades these trends continued as manufacturing declined not only in the city but across the state and trends of racial segregation and disinvestment remained firmly in place. These pressures culminated in the 2008 financial crisis when the resulting home foreclosures hit Detroit particularly hard, causing an economic shock that provided the justification for the imposition of emergency management by the state and then ultimately the city's bankruptcy (Peck and Whiteside, 2016; Tabb, 2015). Following the same pattern as the post-1967 era, a rush to blame Detroit's Black urban leadership obscured the ways in which federal and state disinvestment, poorly-structured and borderline illegal financial instruments, and a worldwide financial crisis had led to the city's financial distress (Peck and Whiteside, 2016); not to mention the ongoing ramifications of racial segregation which had seen much of the region's wealth move to suburban neighbourhoods. Since this time, the ongoing oversight of

the Financial Review Commission, a group accountable to the state governor and with approval power over the city's budget, has meant that Detroit has effectively been ruled from afar by the state government

The bankruptcy and the subsequent remaking of the municipal government has resulted in the prioritization of reinvestment in a newly-white downtown core. The We the People of Detroit Community Research Collective (*Mapping the Water Crisis*, 2016) have documented how emergency management and the post-bankruptcy period have changed the city and created a highly uneven pattern of reinvestment and displacement. They list six "key strategies [that have] advanced the corporate come-back agenda": (1) the disempowerment of the majority African-American electorate through emergency management; (2) the privatization of city services and the dismantling of social services; (3) the destruction of the Detroit Public School system and the stripping of its assets; (4) the shift of policy-making power to private foundations and appointed commissions; (5) the undermining of the local cultural production in the city; and, (6) a mass media campaign that places the problems facing Detroit as the result of the failure of Black civic leadership. As they powerfully argue:

For several decades, Detroiters have observed our city devolve from a thriving metropolis of predominantly African-American working people, proud of our neighborhoods, supportive of our schools and libraries, to a divided landscape where there is a bustling, largely white, downtown core, surrounded by wide stretches of urban prairie and foreclosed and vandalized homes. There are now two cities, one reflecting government and corporate abandonment and loss of jobs, essential city services and amenities; the other, a redesigned enclave from the city center to the riverfront, serving the interests of Detroit-

based multinational corporations and the young, upwardly mobile technocrats who manage the operations. (*Mapping the Water Crisis*, 2016: p. iv)

As Pedroni (2011: p. 211) has argued, the emergency management of Detroit Public Schools is enmeshed with, and an important part of, this process of selective investment and disinvestment, with public school closures and charter openings acting as “the opening salvo of the cleansing of racial histories and place-making from [Detroit] neighborhoods” that allows this development to move forward.

This connection between fiscal reform of municipalities and market-based education reforms is a feature of many American cities. Indeed, in the popular narrative, both within Detroit and nationally, the use of state power or mayoral control to impose the growth of charter schools has been promoted as a necessary urban policy for the ‘revitalization’ of city cores and for the good of local communities. As Davis and Oakley (2013: p. 83-4, original emphasis) write:

From this perspective, the creation of new schools in blighted urban communities is *benevolent* urban policy, designed to transform neighborhoods and provide greater access to resources and opportunities—including access to good schools—for low-income residents living in those communities.

This viewpoint is reflected in the work of pop urbanist Edward Glaeser who advocates for the imposition of charter schools as one part of an agenda to “privatize as much of the dysfunctional space in the city as [possible]” as a means of awakening the entrepreneurial potential of cities and lure investment to them (Glaeser, quoted in Peck, 2016: p. 24). As Imbroscio (2016) has argued, these moves fit within a larger trend of addressing problems of urban poverty through a ‘meritocratic’ orientation to urban policy which seeks to alleviate poverty through unlocking

‘opportunities’ for the poor rather than tackling the root causes of poverty and building more inclusive cities with robust social programs. The emergency management of schools and the imposition of schooling markets are therefore not only processes geared to remake public education but to remake cities as a whole.

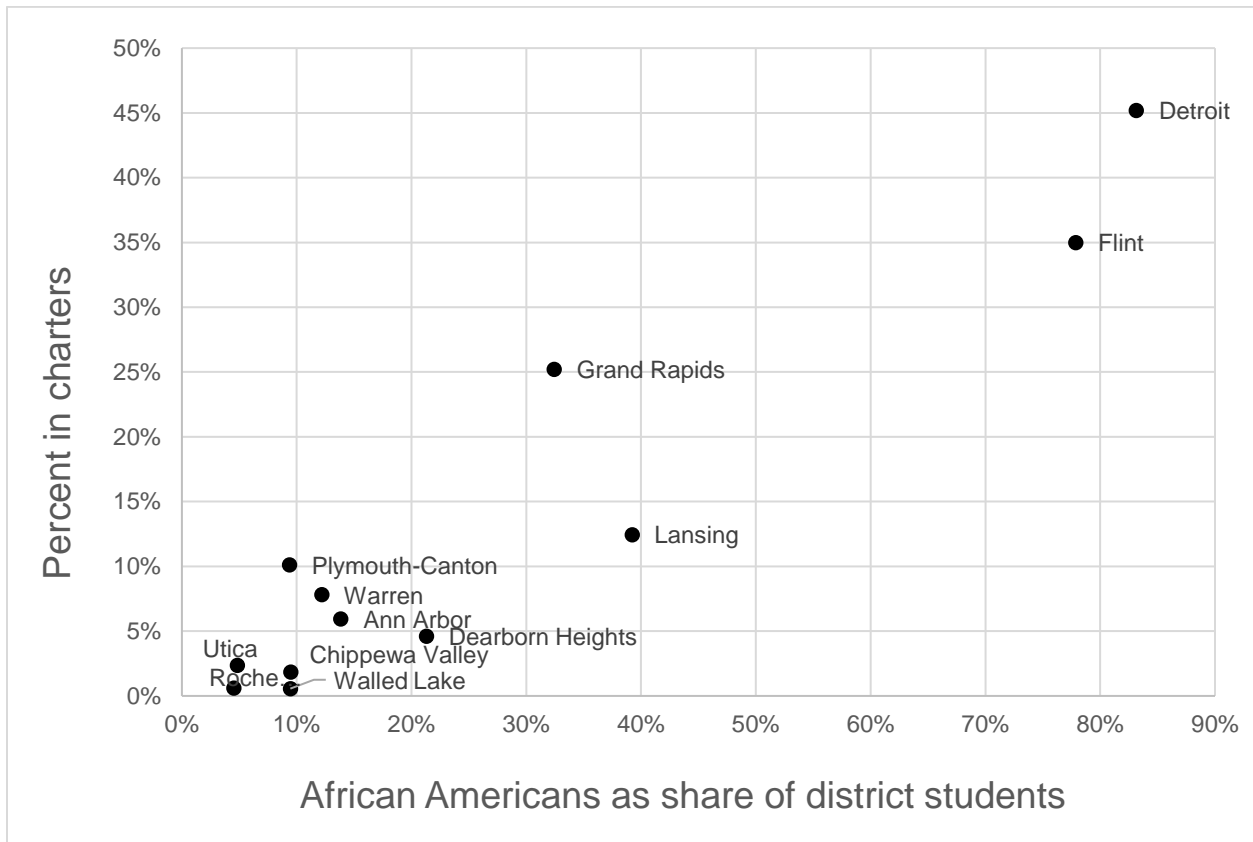
Indeed, there are links between the emergency management of municipal governments in Michigan and that of the Detroit Public School (DPS) district that are easily tracked. The past two emergency managers of the school district, Darnell Earley and Judge Steven Rhodes, are both closely connected to the emergency management of municipal governments as well as of the DPS. Earley was the emergency manager of Flint’s municipal government and was personally responsible for many of the decisions that led to the poisoning of that city’s water. Rhodes was the judge in charge of Detroit’s bankruptcy proceedings and oversaw the dismantling of pensions and city services. These connections highlight the tangible links between the emergency management of Detroit’s schools and the broader remaking of Michigan’s cities. The rest of this chapter will therefore examine how the marketization of Detroit’s school system fits into these wider patterns, specifically in comparison to other school districts in the metropolitan region.

6.2 Race, power, and the spread of markets in the Detroit region

Despite the common policy environment outlined in Chapters 4 and 5, the actual spread of markets within Michigan has been a highly uneven process shaped by the state’s racial politics. As can be seen in Figure 6.1, while majority Black school districts such as Detroit and Flint have seen a rapid proliferation of charter schools, white school districts have been largely sheltered from their growth. This unevenness has not been the result of internal market pressures however, but rather, as will be explored in this section, can best be understood as the result of decades of

disinvestment and the racially-targeted application of emergency management laws. This section is therefore broken up into two parts: (1) a discussion of state control over the Detroit school system and how it has been used to promote the creation of charter schools, and (2) a contrasting description of how other school districts in the region have engaged with schooling markets.

Figure 6.1 African-American population and percentage of students in charters for Michigan’s 12 largest school districts (Michigan Department of Education, 2017)



6.2.1 Emergency management and the creation of schooling markets in Detroit

Crucial to understanding the growth of Detroit’s charter school market is an analysis of the role of state control over the local school board. The Detroit Public School (DPS) district was effectively under state management from 1999 to 2005 and then again from 2009 to the present

day (Kang, 2015).⁶⁵ While this chapter primarily focuses on the second period of state control, Kang has referred to the first period as essentially a “dress rehearsal” for what was to come, recounting that:

Ultimately, [the first period of state control] did little to improve education or finance. In fact, the fiscal situation grew significantly worse under mayoral control: the CEO, Kenneth Burnley, had begun his tenure with a \$93 million surplus and by the end of his tenure in 2004 reported a \$200 million deficit... During the period of mayoral takeover, thousands of students left the system along with their per-pupil funding, a loss of nearly \$225 million in state funding. In spite of some reported educational improvements, Proposal A had created a context in which Burnley could not attract new students fast enough to offset the ones who were opting to leave the system. The fiasco would result in Detroiters voting for the return of the publicly elected school board in November 2004 (Kang, 2015: p. 74).

This history of a worsening financial situation under periods of state takeover has often been hidden in debates around the Detroit Public School (DPS) system however. Instead, the wider city-wide narrative of local mismanagement under Black leadership also shaped how the financial struggles of the DPS are understood, with the supposed failures of local management of the DPS a constant refrain that shapes the continued marshalling of state power to control Detroit’s schools.

The second state takeover of DPS was far more significant in terms of helping push for the marketization of schooling. This takeover, geared at addressing the districts’ financial deficit,

⁶⁵ The first period of state control was promoted as putting Detroit’s mayor, at the time Dennis Archer, in charge of DPS. However, the presence of an oversight board which included the veto power of a gubernatorial appointee meant that the state had effective control over the school district. Indeed, this veto power was used by Governor Engler to prevent the appointment of an anti-voucher superintendent for the district (Kang, 2015).

saw the imposition of a market ideology in ways that would drastically remake the city's educational landscape. The takeover's orientation towards markets-as-solution was made clear by the first of five emergency managers, Robert Bobb, who quite simply told *The Wall Street Journal* "We want to create a marketplace of schools" (Dolan and Banchero, 2011: para. 7). As implemented by subsequent emergency managers over the next eight years, this market vision, undertaken with support from the Governor's office, resulted in the creation of a charter school marketplace widely characterized as out of control. Indeed, Detroit's charter school market has been referred to as 'the wild west' (Zernike, 2016) and the site of 'cutthroat competition' (Institute for Innovation in Public School Choice, 2014) in different publications.

Importantly, this vision for the remaking of the Detroit school system through state power has been supported by a cabal of now-familiar actors including, as discussed in Chapter 5, Eli Broad. Notably, Broad paid part of the salary of DPS' emergency manager and helped Bobb, who graduated from his 'Superintendent's Academy,' secure his appointment to the position (*Philanthropy News Digest*, 2009). This group also included local charter school operators, philanthropists, the emergency manager, and state officials. Freedom of Information Act documents showcase how these actors worked in concert, with e-mails chains often including a mix of bureaucrats and foundation employees planning the future of the district. For example, an e-mail chain discussing the possibility of bringing national charter school management chains to Detroit in 2012 included not only DPS employees but also employees of the Broad Foundation, Skillman Foundation, Excellent Schools Detroit, and Michigan Future Inc. (*Inside the EAA*, 2014). Similarly, e-mails between state bureaucrats such as State Superintendent Mike Flanagan and the Governor's staff often included employees of the Broad and Skillman foundations as recipients (MDE FOIA 11, 2014). Thus, while the state acted as the enforcer of the policies

described below, the planning of these projects, and the resources used to undertake them, came from a broad array of actors, although crucially, not the elected representatives of the city or the school board.

Understanding these groups, their motivations, and their connection to the emergency management of DPS is central to understanding schooling markets in the city. Under the leadership of these groups, DPS' emergency managers have actively worked to promote the growth of charter school markets and to restructure the DPS to be more market-oriented. This has been accomplished through a mix of school closures and the handing over of Detroit schools to charter school operators. A policy of school closure matched with charter school openings, and its support from a wide-range of actors, can be seen through the actions of the umbrella organization Excellent Schools Detroit (ESD). The group was established in 2010, a year into the term of the first emergency manager, and quickly published its plan for Detroit's school system, aptly titled *Taking Ownership* (2010). This document, which was signed by charter operators, local philanthropic foundations, and, crucially, the emergency manager, illustrate both ESD's support from local elites and its market vision. At its official launch, which was attended by the Robert Bobb, ESD announced its plans to close public schools across the city and replace them with charters. As Doug Ross, a charter school operator who would later be appointed the head of DPS' charter school office, stated at the launch:

The vision of this group is an education marketplace in Detroit with common high-performance standards in which DPS, charter, and private schools compete for students around those academic standards... So, bottom-line, the old plan said to parents 'wait, be patient, give us another five years to improve where your child goes.' This plan says 'uh-uh, waiting's over.' We're going to close low-performing schools, we're going to open new

ones and parents now you have to take the initiative to find the best school for your child.

Big difference, new day. (Skillman Foundation, 2010)

Specifically, *Taking Ownership* (2010) called for the closure of half of the city's 'failing school programs' by 2015 and the opening of 40 new 'high-quality' schools over the same period.

While charters are not explicitly mentioned as the desired high-quality schools, FOIA documents reveal that members of this organization engaged in talks with large, national charter school operators in hopes of bringing them to the city (*Inside the EAA*, 2014).⁶⁶ Thus, the growth of charter school markets, as guided by these actors, was a central goal of ESD and DPS' emergency managers.

Indeed, the plan outlined in *Taking Ownership* quickly became practice under the leadership of Robert Bobb and subsequent emergency managers Roy Roberts and Jack Martin. During his two-year term Bobb closed almost 60 schools and explicitly copied the school closure plan undertaken in Chicago, naming his Detroit plan 'Renaissance Plan 2012' after the 'Renaissance 2010' plan in Chicago which closed 80 public schools and pushed for more charters in the city (DPS presents Renaissance Plan 2012, 2011). As he told *Tell Us Detroit TV* (*Robert Bobb to unveil DPS Renaissance Plan 2012*, 2011) regarding the plan: "we will bring the very best charter operators so that we are creating a system of schools as opposed to a school system." The policy of school closure and cooperation with charters has continued throughout the emergency management of DPS to the present day with the number of schools run by DPS dropping from 198 in 2007-2008 to 103 in 2015 (Guyette, 2015). This clear and drastic remaking

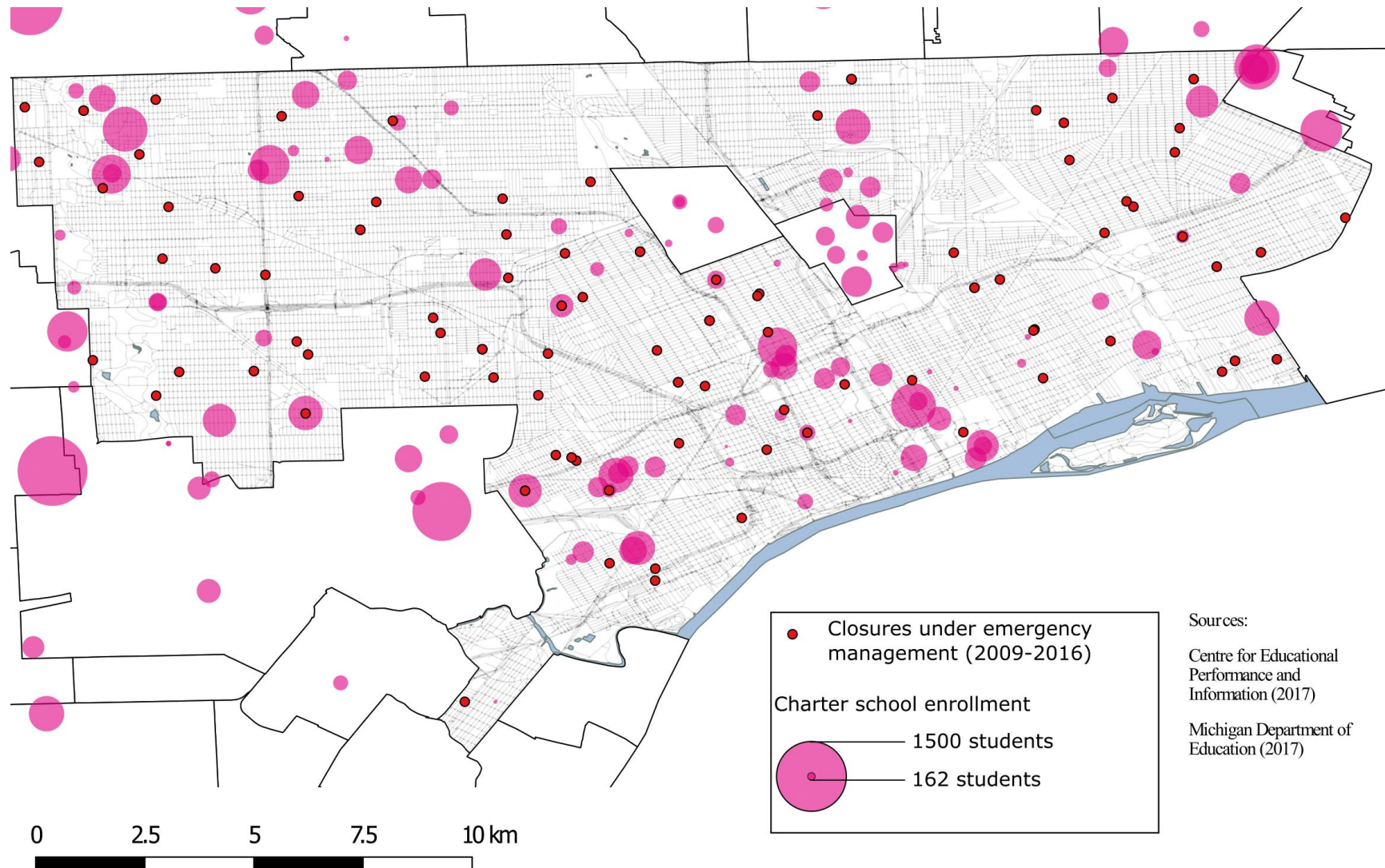
⁶⁶ This included Rocketship Education, Knowledge is Power Program (one of the chains discussed in Chapter 3), Noble Network, LEARN, and Uncommon Schools (*Inside the EAA*, 2014).

of the city's educational landscape can be seen in the map of school closures and charter school enrolment shown in Figure 6.2.

Furthermore, as described in Chapter 5, this policy of school closure coincided with the removal of the cap on the number of charter schools that could be authorized by state-wide universities. The lifting of the cap led to the average number of charter schools opening in Detroit per-year to jump from 5.6 in the three years before the cap was lifted to an average of 12 in the years following the removal of the cap (*Centre for Educational Performance and Information, 2017*). This meant that the mass closures of DPS schools through emergency management was paired with a growth in the number of charter schools opening in the city. Quite literally, the state thrust students into the educational marketplace by closing schools out from under students at the same time as it was allowing more charter schools to open. The impact of these changes can be witnessed in the fact that the percentage of Detroit students attending charter schools grew from 31% in the first year of the second period of emergency management (2009-2010) to 46% in the 2016-2017 school year (Michigan Department of Education, 2017).⁶⁷ The 'choice' of students to enter into this marketplace must therefore be understood as constrained and shaped by the lived reality of these students and their parents within the context of school closures; indeed, as Sheppard (1980: p. 206) has argued in cases where the ability of actors to choose is constrained, the exercise of choice in such circumstances often "expresses no preference at all."

⁶⁷ Unfortunately, the 2009-2010 school year was the first year that the state began specifically tracking resident/non-resident data, so the growth during the first period of emergency management is unavailable.

Figure 6.2 School closures under emergency management and charter school enrollment in Detroit



At the same time that these school closures were occurring, those who sought to prevent the takeover and resist school closures were marginalized or excluded from the debate through legal and discursive means. Most prominently, Governor Snyder's team worked to ensure that the elected school board remained side-lined in policy debates. As FOIA documents reveal, this was discussed at the highest levels with Governor Snyder's chief of staff, Dennis Muchmore, writing to the State Superintendent, Mike Flanagan, that he was concerned with "the problem with DPS and keeping their old board out of the middle of this. We're trying to make sure the [Attorney General] is ready to deal with them. [Emergency Manager] Roy [Roberts] is very troubled by their efforts to reasserts themselves" (MDE FOIA 9, 2014).

The disempowerment of the elected school board also manifested itself in repeated legal moves to ensure that they would have no influence over the functioning of the DPS. This began with the legal battle over the appointment of Robert Bobb into the position of emergency *financial* manager and his subsequent attempts to control district policy well beyond financial matters. This was important because the law used to appoint Bobb (PA 72) gave him control over only the finances of the district, meaning that Bobb's use of his authority to set the district's policy directions exceeded the powers given to him under the law — a fact that was confirmed in a successful 2010 lawsuit. In response to this ruling, the state legislature quickly passed PA 4 which established the control of emergency managers over all aspects of a school district's operation and further expanded their powers by allowing them to override collective bargaining agreements and disregard local laws. This expansion of power was met with widespread backlash and PA 4 was repealed by a state referendum in November 2012, returning control over education policy to the elected school board. In response to this repeal (and in an act of shocking disregard for the will of the voters), in December 2012 the state legislature passed PA 436 which

largely reinstated PA 4 and the power of emergency managers with one crucial addition: an appropriation of funds that made PA 436 referendum-proof and thereby prevented another repeal. In this manner, the school closures in Detroit were enabled through the disenfranchisement of Detroit's voters and the marshalling of the state's legal apparatus to quash dissent.

Furthermore, at the same time as the emergency manager was closing schools, the Governor, working closely with the Broad Foundation, was planning his signature education reform: the Education Achievement Authority (EAA). Inspired by the turnaround district model, a preferred Race to the Top strategy, the EAA was designed to takeover schools that performed poorly on state-wide tests and then to place them under its own control. Despite being promoted as a state-wide turnaround district, the EAA was only active in Detroit, taking over 15 DPS schools and thereby further reducing the number of schools under district control. Of these 15 schools, 12 were directly operated by the EAA and three were handed over to charter school operators. While, the EAA is now considered a failure on all levels and these schools are being returned to the DPS, they were yet another state-led act under emergency management that resulted in the takeover of DPS schools and their transfer into the hands of a new authority.

As a whole, the closure of schools, the takeover strategy of the EAA, and the widespread opening of new charter schools has meant that many Detroit students were forced to engage with schooling as a market relation. This puts a lie to the notion that market decisions can be understood outside their social and political context. Students displaced by school closures were often left on their own to find their next school and, at the same time, were aggressively targeted by charter schools looking to boost their enrolment. A 2014 study (ironically funded by Excellent Schools Detroit) described this state of affairs in detail. The report outlines the

information vacuum faced by the most at-risk families as well as the predatory actions of charter schools. As one parent told the researchers:

People at every school are telling me that they are great, that their school is the best one for my child. They offer us sneakers and iPads and other gifts if I send my child there. How am I supposed to know if a school will really educate my child? (Institute for Innovation in Public School Choice, 2014: p. 12)

The report goes on to describe the cutthroat competition in Detroit and the pressure that charter schools are under to undertake marketing campaigns and to offer gifts as they attempt to recruit enough students to ensure their ongoing survival. Even the local school district has not been immune from participating in this system. Figure 6.3 shows a DPS advertisement targeting students who are experiencing charter school closures — students that may have had a DPS school close on them in the past.

Figure 6.3: DPS advertisement

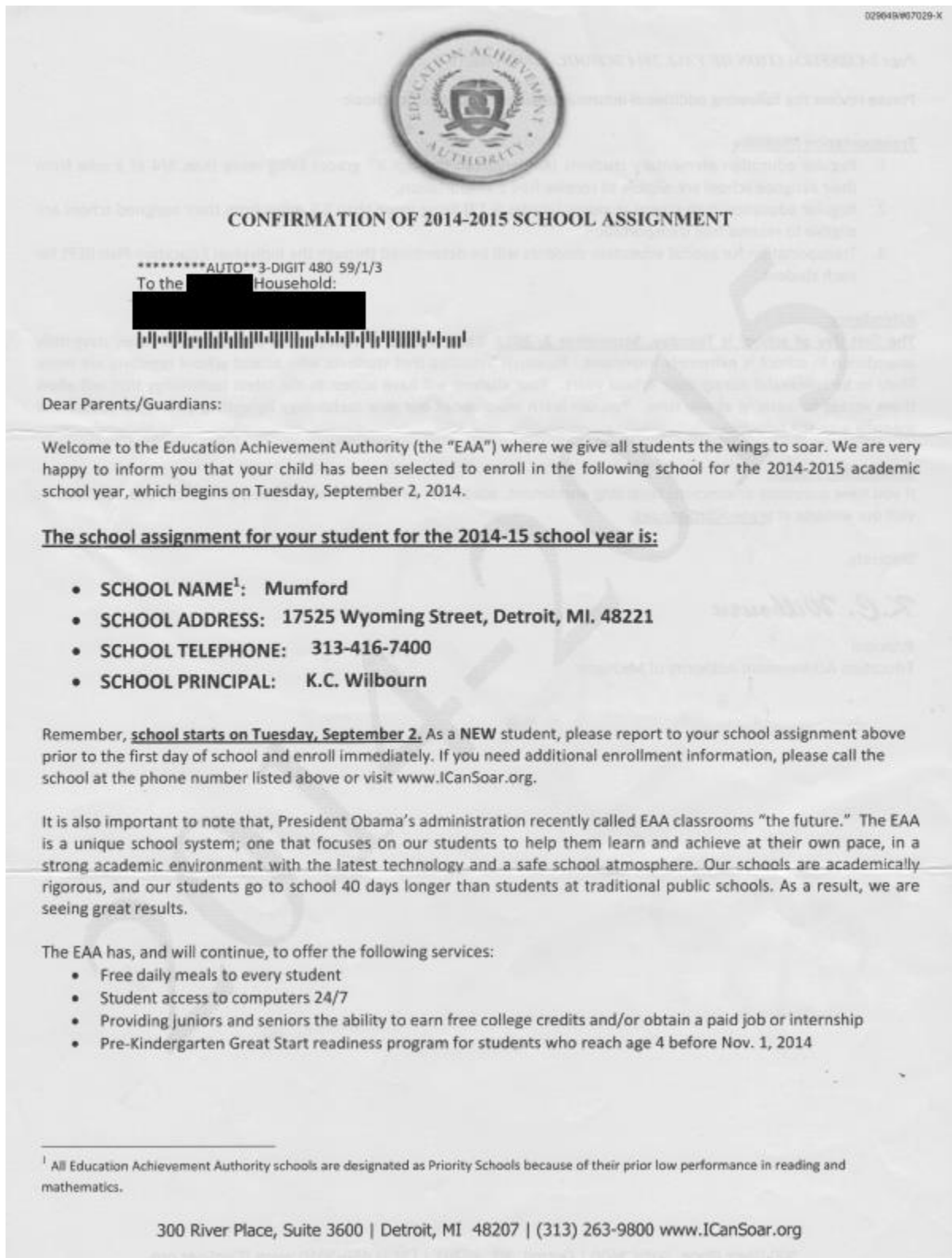


Photo credit: Emma Howland-Bolton

This environment of intense bombardment of parents and students who must navigate this array of choices must be understood within the context of school closures as illustrated in the map presented earlier (Figure 6.2). Such closures have meant that students in large swaths of the city are left without a clear schooling option at the same time as they are targeted by intense advertising campaigns. The expansion of market rule over schooling as facilitated by emergency management has therefore forced parents and students in Detroit to view schools as consumers.

A remarkable example of the chaos and predation that Detroit students face can be seen in a letter sent out by EAA in August 2014 included below as Figure 6.4. Reportedly sent out to students of least seven local school districts, this official-looking letter is confusingly titled ‘Confirmation of 2014-2015 School Assignment’ and makes it seem as if these students have already been enrolled in an EAA school and that they simply need to confirm this enrolment (*Electablog*, 2014a). In reality, these letters were sent to students who were not enrolled in EAA schools and appear to have been a strategy designed to trick students into attending them. The EAA eventually apologized for the letter, stating “the letter did not make it clear enough to parents that their local EAA school is just one of several educational options available to them. We apologize for any confusion the letter may have caused” (*Electablog*, 2014b). However, it is indicative of the environment that Detroit’s students and parents find themselves in amongst the chaos of emergency management, with school closures, the state takeovers of schools, and the rapid opening (and closing) of charter schools often leaving them adrift in the face of what even some charter supporters refer to as the ‘wild west’ (Zernike, 2016).

Figure 6.4: EAA letter



Importantly, as many scholars within the sociology of education have pointed out, such environments place disproportionate burdens upon marginalized communities, and especially women of colour, to navigate this chaos on top of their many other responsibilities. As discussed in the introduction to this dissertation, the design of this project did not include research at the household level, however work studying how families navigate school choice in similar settings is instructive in this regard (Cooper, 2005; 2007; Pattillo, 2015; Stambach and David, 2005; Vincent, 2017; Wilson, 2015). For example, Pattillo (2015: p. 63), discussing the dynamics of choosing a school in Chicago, writes:

[the narrative of choice] underestimates the cumulative physical and psychological effort that poor parents expend in making ends meet and surviving (Mullainathan and Shafir, 2013); minimizes the disproportionate toll that searching for a school takes on families for whom even bus fare can pose a financial challenge; and legitimizes the logic that accessing a quality public good should require work in the first place.

Thus, students and caregivers in Detroit, already facing the burdens of the city's eroding social infrastructure, were placed into a market relation — a relation that cannot be understood outside of the racialized and gendered context within which this decision making occurred.

6.2.2 Freedom to choose: Suburban districts and markets

In contrast to Detroit, most other school districts in the metropolitan region have not been subject to the same level of state oversight and control. This has meant that these school districts have engaged very differently with the market for students and that students in these districts have not been forced into engaging with schooling as a market relation. Of course, as outlined in Chapter 5, many of these school districts face some of the same structural pressures as Detroit such as budget shortfalls in an austerity environment and declining enrollment; however, unlike Detroit

they have been free to adjust to these pressures in the manner of their choosing and have worked to actively boost traditional public schooling rather than undermine it. Thus, while some structural issues remain the same, school districts in the suburbs of Detroit have engaged in schooling markets through vastly different approaches and often in a manner shaped by the racial dynamics of the metropolitan region.

Before the actions of these school districts are discussed however, it is important to establish that race has been a clear factor in this differential treatment of school districts. This is most obviously witnessed in the uneven application of emergency management laws: while 55 school districts across the state were in a deficit situation in 2014, currently only majority Black districts have been placed under state management (Bosman and Davey, 2016; Williams, 2014). This fact has not been lost on the general public. For example, while the superintendent of Garden City Public Schools, Michelle Cline, caused a brief controversy when she told a public meeting that they needed to undertake austerity measures unless they wanted to be the first white district to face emergency management, the blowback she faced was indicative of how unlikely the prospect really was. Indeed, Cline defended her comments by stating:

All the districts cited are impoverished districts that are predominantly black. There is apathy, and I wonder if that is because the districts that have gone down are predominantly black. I wondered if the staff thought this wouldn't happen because Garden City is predominantly white. Nobody seems to care about the predominantly black schools. The people in the audience didn't seem to believe we could go under. Is that because we are predominantly white? That was why I said what I said. (Lewis, 2015: para. 14).

Despite her protests that the threat of emergency management over Garden City was real, no white school district has been put under emergency management. The controversy Cline faced

was because she named a reality that everyone knew, but that could not be acknowledged: only majority Black school districts were viewed as suitable for emergency management.

Within the context of the uneven racial application of emergency management, the difference that this freedom to act has made for other Detroit-region school districts goes beyond simply the absence of the active turnover of their schools to charter operators. Districts not under state management have been able to protect themselves against the incursion of charter schools and even to take advantage of their relative freedom to, in turn, attract Detroit students. Table 6.1 below clearly charts the difference in student movement facing local school districts. Notably, it is apparent that Detroit is an outlier in the region with 46% of the students that live in the district attending charter schools and 14% more attending schools in other districts. Meanwhile, local school districts that also face the pressure of students leaving their district such as Oak Park and Ferndale have, as will be explored below, actively sought to make up budgetary pressures by attracting outside students. On the opposite end of the spectrum, wealthy school districts like Bloomfield Hills and Grosse Pointe, which have higher funding levels than most other districts even post-Proposal A,⁶⁸ and which have lost very few students to charters or other school districts, have been able to opt out of the market altogether by not allowing out-of-district students to attend their schools; continuing an ongoing practice of segregation enacted by these

⁶⁸ This is because when Proposal A was implemented a ‘hold harmless’ clause was enacted that ensured that no school district would drop in funding levels. Even after twenty years, over 50 school districts continue to have higher funding levels than the rest of the state as a result of the maintenance of their pre-Proposal A levels of funding (Pratt-Dawsey, 2014)

communities that mirrors the physical barriers they have established to prevent their integration with Detroit.⁶⁹

Table 6.1: Student movement in selected Detroit region school districts (Michigan Department of Education, 2017)

District	County	Outgoing Students				Incoming Students	
		To Schools of Choice	% of Resident students	To Charters	% of Resident students	Schools of Choice	% of District
Bloomfield Hills	Oakland	253	5%	31	1%	355	6%
Dearborn	Wayne	741	3%	1,445	6%	198	1%
Detroit	Wayne	14,536	13%	50,590	46%	1,852	4%
Ferndale	Oakland	547	22%	121	5%	1,358	43%
Grosse Pointe	Wayne	171	2%	111	1%	57	1%
Northville	Wayne	219	3%	199	3%	284	4%
Oak Park	Oakland	1,224	34%	533	15%	3,079	62%
Van Dyke	Macomb	1,097	30%	217	6%	252	10%

The differences between these school districts cannot be understood without attention to how emergency management prevented DPS from responding to the pressures it faces and the freedom other school districts have had to respond to similar pressures. While under emergency management the DPS actively closed schools and turned them over to the EAA and charter school operators, other school districts were able to choose how and whether they engaged with charter schools. For example, in Saginaw the local school district decided to demolish a local school building rather than to sell the building to a competing charter school chain (Johnson, 2015), an alternative that would have been impossible for the DPS while it was under emergency

⁶⁹ For example, suburban municipalities have repeatedly voted against a regional transit network that would make it easier for Detroit residents to access their cities (AlHajal, 2015) and Grosse Pointe has recently used a farmer’s market to block off a street that connects Grosse Pointe to Detroit (Harmon, 2015).

management. On a broader level, and as was briefly recounted in Chapter 5, I was told by both pro-market and anti-market lobbyists that when Governor Snyder attempted to expand the EAA outside of Detroit widespread resistance from suburban communities prevented this expansion.⁷⁰ The ability of these richer, white communities to stymie policies that would impact their schools is illustrative of how the uneven geography of market rule was facilitated not only by the imposition of emergency management in Detroit but also by the active efforts of other communities to prevent the implementation of the models used in Detroit in their own school districts.

This is not to say that all school districts were equally able to respond to the spread of charters and competition from other school districts in the manner of their choosing. The place of different school districts within the city's landscape of race and power shaped whether and how these districts engaged with a competitive marketplace for students. This became clear when Governor Snyder's proposal to making the Schools of Choice policy mandatory throughout the state ran up against opposition from richer school districts that did not need out-of-district students to balance their budget. Several of these school districts passed resolutions opposing the motion, with the Grosse Pointe School District describing their opposition to the changes as based on the 'sacrifices' its residents had made in choosing to live in an upper-class neighbourhood and in funding their schools at a higher level (Tuthill and Emerson, 2011). As they wrote to Governor Snyder, they opposed the policy because:

⁷⁰ Charter School Advocate, Michigan, 18 December 2014; Employee, Parent Activist Group, Michigan, 29 January 2015

the citizens of the Grosse Pointe Public School System have chosen to make personal sacrifices, including but not limited to investing in premium housing stock, approving in elections to levy upon themselves a Hold Harmless millage and additional millages to maintain and improve the physical plants and other infrastructure in order to establish and maintain an optimal learning environment for the youth of our community (Tuthill and Emerson, 2011: p. 1).

And also based on the argument that forcing Grosse Pointe to accept the Schools of Choice policy would undermine the ability of the local school district to control education within their boundaries:

this contemplated legislation and the stated position of the Governor represents further elimination of the local community's authority, granted by the State School Aid Act, to make decisions at the local level after taking into consideration factors unique to their individual circumstances and representing the will of the local community to make decisions in the best interests of our students (Tuthill and Emerson, 2011: p. 1).

Thus, at the same time that DPS was placed under extreme austerity measures and saw control handed over to the state government, wealthier districts in the region were able to continue to generously fund their schools while preventing any incursion of market-based reforms into their district. They were able to do so by tapping into the superior resources available to them as longstanding sites of concentrated racial and economic power and, somewhat ironically, by mobilizing the principle of local control — the application of which was currently being denied to Detroit residents.

The ability to completely opt out of participation in the competition for students was limited to only the richest school districts, however. As discussed in Chapter 5, many other

school districts faced financial pressures caused by declining enrolments combined with an austerity regime. In the face of these pressures, some Detroit-region school districts engaged in aggressive recruitment drives and attempted to utilize the Schools of Choice policy to bridge their budgetary shortfalls. As shown on Table 6.1, school districts like Oak Park and Ferndale have balanced their loss of students to charter schools and other school districts through attracting an influx of out-of-district students. Oak Park is a stunning example of this, with 62% of the district's students residing outside of the district's boundaries. This process has often come at the expense of Detroit's public school system; in fact, in Oak Park, 84% of district students who live outside of the district come from Detroit and in Ferndale this figure is 44% (Michigan Department of Education, 2017). These attempts to recruit Detroit students constitutes a dramatic shift from the pre-Proposal A era of public schooling in Michigan when many suburban districts actively sought to prevent Detroit students from attending their schools, even going so far as to report out-of-district students to the police.⁷¹

The ways in which these suburban school districts have engaged in this competition for students has varied greatly due to patterns of racial segregation and the peculiarities of the policy environment governing how students move between districts. The racial segregation that has long defined the Detroit region (Kinney, 2016) has been a particularly important factor shaping how school districts have attempted to recruit outside students. Despite the fact that school districts like Ferndale, Oak Park, and Van Dyke have all seen over 20% of their own students leave the district, each district has responded differently but in a manner that reflects their

⁷¹ Educator and member of a local parent group, Michigan, 6 January 2015; GLEP employee, Michigan, 26 January 2015; Charter School Advocate, Michigan, 18 December 2014; Former teacher, Michigan, 6 February 2015

community's racial composition. While Oak Park is a suburb with a large Black population (57%), Ferndale (10%), and Warren⁷²(14%) have much smaller Black populations (United States Census Bureau, 2017). Not surprisingly then, Oak Park has been the most receptive to students from Detroit and has an active campaign to draw students from Detroit to their school system with their website featuring the slogan 'Get the Oak Park advantage.'

Ferndale and Van Dyke have exhibited a much more tentative engagement with this competition for students, however. While Ferndale also has a high number of out-of-district students and is facing financial pressures, the district has taken advantage of a loophole in the Schools of Choice policy to bring Detroit students into the district while maintaining a system of segregation along geographic, and implicitly racial, lines. This has been accomplished through opening a high school, University High School, that accepts students from other counties (Section 105c under the Schools of Choice policy) while limiting enrolment in the district's current high school, Ferndale High School, to only students within the county (Section 105). Because Detroit is in Wayne Country and Ferndale is in Oakland County this has effectively created a segregated system where University High School became the 'Detroit' school and Ferndale High School, which did not accept out-of-county students, remained the school for the students within the district. This helped the district maintain a segregated system while bringing in new sources of funding (Pratt-Dawsey and Wilkinson, 2016).

Van Dyke Public Schools exhibited an even more tentative engagement with the market for students in the region. In the face of financial pressures the school district decided to open their enrolment to students outside of the county, but left in place one important caveat: they

⁷² Where Van Dyke Public Schools is located.

would only accept kindergarten students. As reported at the time (Allard, 2012), the district's board used barely-veiled racist language to justify this decision in the face of community opposition:

"We're not just letting a mad rush of people come into the district," Board Treasurer Steven Nielson said. "Kids must be in kindergarten, so we can have them ... for 13 years."

...

It was a difficult decision to vote in favor of opening up across county lines for some board members, who discussed the matter before voting on it.

"I'm not comfortable with this," Trustee Eleanor Bates. "I know we need to do this, I guess."

Student discipline was a concern for Bates.

"We need to get tougher on our behavior problems," said Bates, adding some of her neighbors send their children to Warren Woods Public Schools and Center Line Public Schools instead of Van Dyke. "(They) said there (is) no discipline in our schools. It's so disappointing to see what the students are getting away with. I think we have to clamp down on our discipline."

"I do feel what we're doing is the proper thing," Board Secretary Richard Carloni said, inquiring about what "safeguards" will be put in place, so students and staff are safe. At the board table, he said he has heard from staff and students who said they don't "feel safe in school."

...

As for the student that Brinkey said takes two or three buses and walks a mile to be in school, "That's the student I want here." (Allard, 2012: para. 4-19.).

Thus, while Van Dyke participated in the market for students due to economic necessity, their engagement was shaped by the racist fear of Detroit students as safety risks to other students and teachers. Questions about what ‘safeguards’ would be put into place to make sure students and staff were safe from *kindergarten students* reveal how the deeply-rooted patterns of racial segregation in the city shaped Van Dyke’s decision to engage only tentatively with a system of competition for students. While Van Dyke now accepts Detroit students, they will only do so if they can ‘have them’ for their entire schooling experience and after the region’s lack of public transit has filtered out poor students or those who are not willing to take multiple buses and walk for miles.

As outlined above then, across all three districts there has been a conscious effort to recruit Detroit students as a means of managing budgetary pressures. Importantly, this has involved not only opening up spots through the Schools of Choice policy and hoping students attend the district’s schools, but also the creation of marketing campaigns geared at attracting Detroit students. Indeed, multiple local administrators reflected on the fact that the amount of money and time spent on marketing has skyrocketed over the past decade.⁷³ Figure 6.5 provides an example of one such advertisement geared at Detroit students. This advertisement, which is from the River Rouge school district bordering Detroit, is just one example of the way many school districts in the region have turned to marketing as a means of attracting students. What this has meant is that as school districts are faced with financial pressures, the resources of these

⁷³ Suburban school board member, Michigan, 22 January 2015; Local principal, Michigan, 22 January 2015; ISD administrator, Michigan, 16 February 2016.

cash-strapped districts are often diverted towards advertisements in hopes of turning around budgetary deficits — exacerbating such pressures when these efforts are unsuccessful.

Figure 6.5: River Rouge advertisement



Photo credit: Josh Akers

Advertising campaigns such as River Rouge’s are often controversial however, as is the tactic of attracting Detroit students to neighbouring school districts. This is in part because as more students from Detroit attend suburban school districts, parents residing in these districts have often moved their children from what are now perceived as ‘unsafe’ schools based on the racial fears highlighted in the Van Dyke case. This has led to the phenomenon of ‘funnel districts’ where the number of incoming students from Detroit is matched by the number of students moving elsewhere (Alvarez, 2013). As described by a suburban school board member:

As you’d suspect we had a large marketing campaign... in its inception it was definitely lots of targeted marketing of various media forms including local Black radio stations in Detroit, lots of flyers, and this was actually a bone of contention within the district because we are now in this market environment. Because of Schools of Choice, [school district A]

is trying to market to our kids, [school district B] is trying to market to our kids, and everyone is trying to steal our kids and all of our marketing money is geared towards trying to bring kids [from Detroit].⁷⁴

In this case, the attempt to manage budgetary pressures by attracting Detroit students, ran up against the need to advertise to the *districts' own students* in the face of other school districts' marketing campaigns. The combination of austerity and the racial landscape of student movement has therefore resulted in a highly complex targeting of students in an all-out battle for funding dollars — a battle that plays out along lines of race and power.

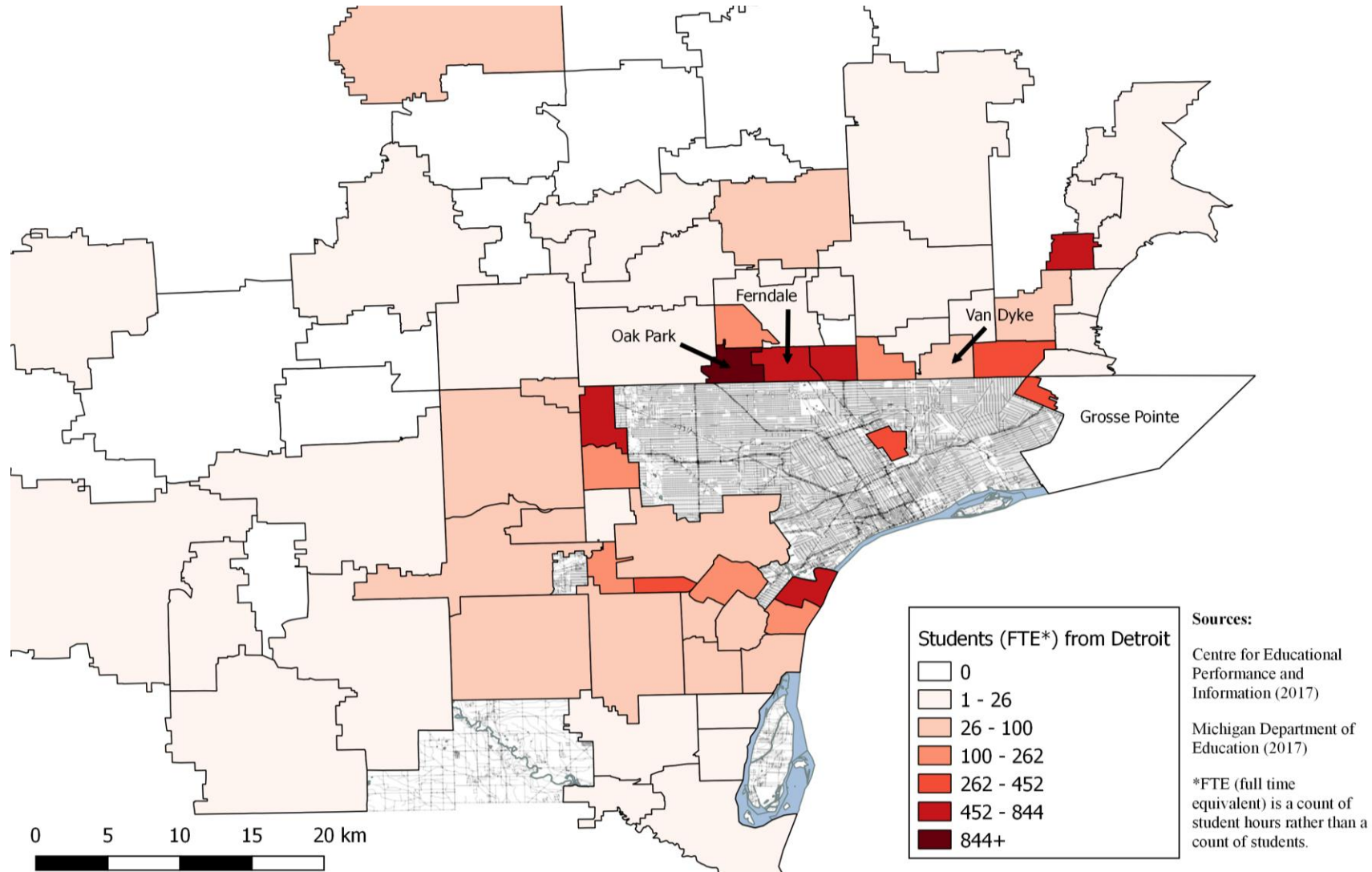
The map shown in Figure 6.6 illustrates the highly uneven flow of Detroit students within the metropolitan region described above, with districts such as Grosse Pointe preventing the attendance of Detroit students, districts like Oak Park embracing the flow of students from Detroit, and others having a far more restricted engagement. These differences illustrate a very important reality of how schooling markets have emerged in the Detroit region: that a district's ability to react to market competition is based on vast disparities in wealth and power as well as the racial politics of the region. At the extremes are school districts like Detroit and Grosse Pointe. With the former, state power has been used to prevent the local community from choosing its approach to markets; with the latter, the level of wealth in the school district has meant that markets can safely be ignored even within an environment of state-wide austerity. In the middle are school districts like Oak Park, Ferndale, and Van Dyke who face pressures that require them to engage with schooling markets, but are able to do so on their own terms by using

⁷⁴ Suburban school board member, Michigan, 22 January 2015

the Schools of Choice policies to manage which out-of-district students they allow into their schools.

The differential engagement of school districts with the market for students also illustrates that markets can be an opportunity for those with the power to shape their structures to their needs and, conversely, that markets can act as a disciplining or destructive force for those without power. As outlined above school districts with some measure of power have been able to use the creation of markets to attract the funding associated with outside students and thereby to increase the amount of funding they bring in every year. For districts like Detroit however, which have been under state-imposed emergency management, no such power was available to them and markets served as a destructive force. Building on the examples from the previous two chapters, this further highlights how power generated outside of markets can be brought to bear upon them to ensure that they function in the interests of those with power — with wealthier school districts able to shape the market according to their needs.

Figure 6.6: Enrollment of Detroit students in surrounding school districts



Beyond power dynamics, this differential engagement in a competition for students has also been shaped by the racial segregation of the region and the anti-Black racism that it reflects. This is not just seen in the uneven application of Michigan's emergency management laws, but also in the differences in how Oak Park, Ferndale, and Van Dyke have chosen to engage in the market for students. Oak Park, as a historically Black suburb, has participated in this market whole-heartedly, while Ferndale and Van Dyke have had a much more tentative engagement. In the latter districts, thinly-veiled racial fears have resulted in an approach to markets that maintains segregation while still bringing in the funding associated with out-of-district students. This illustrates that, as education scholars studying school choice policies have noted, constructions of schooling markets as the reflection of individual choice often obscure the ways in which race and racism are inherent to how markets for schooling function (Gillborn and Youdell, 1999; Gulson, 2011; Scott, 2011). Indeed, Gillborn and Youdell (1999: p. 216) argue that markets actively enable and strengthen the role of racial power in shaping schooling:

By adopting an individualized perspective, therefore, education policy and practice are increasingly enshrining racism in a discourse that apparently removes 'race' from the picture, but simultaneously provides the perfect conditions for racist stereotyping to flourish.

This can clearly be seen in the case of markets in the Detroit metropolitan region, where the choices of the Black and Latinx students that make up the majority of Detroit students about where they can attend schooling is highly prescribed by the structure of the Schools of Choice policy. In contrast to narratives that portray the increased segregation that school choice policies often bring as the result of individual choices, the actual functioning of schooling markets

highlight how the movement of students is shaped by the way racial power is baked into market structures.

The functioning of education markets in the city can therefore not be separated from the racial segregation that characterizes the city as a whole and the uneven power available to different groups. Importantly, rather than simply being the reflection of individual choices on a marketplace, the racially-uneven spread of markets is instead built into the institutions that govern the competition for students in the Detroit region. The fact that school districts can use state legislation to prevent Detroit students from attending suburban school districts and have actively worked against attempts to remove this legislation, is central to how the market for students created through the Schools of Choice policy functions. Meanwhile, the decision to close schools in places like Detroit pushes parents and students into a market-based relationship with schooling. Racism and the racist distribution of power is therefore central to understanding the institutional structure of the regional markets for students in the Detroit region, shaping who engages with market relations and how they do so, rather than simply reflecting the ‘choice’ of individual actors. In this way schooling markets are deeply embedded within the racial politics of places like Detroit, reflecting the inequalities of power that have characterized the city from the postwar period to the present day (Kinney, 2016; Sugrue, 2014 [1996]).

Importantly however, the articulation between racial segregation and schooling markets does not simply reflect these racial geographies, but is a key site of their continual reproduction and the shaping of how these geographies evolve. So, while previously many local school districts had completely restricted the entry of Black Detroiters into their schools, the movement of students across the region has been fundamentally altered as school districts seek to attract students in order to increase their level of funding. This has led to new, although no less

insidious, patterns of racial segregation in the region's schooling system. Furthermore, as will be discussed in the next section, the functioning of schooling markets are also a key site of struggle over the future over the city of Detroit, the results of which may have a profound impact on the processes of urban restructuring that have brought middle-class white residents into the downtown and midtown of Detroit while facilitating the displacement of long-time Black residents (Akers, 2015; Kinney, 2016; Safransky, 2014).

6.3 The struggle over Detroit, the struggle over markets

Despite the concentration of the power in the office of the emergency manager, struggles over the future of the Detroit Public School (DPS) district have been far from simple. While the district has been under state control since 2009, the tactics used to govern Detroit's schools have been the site of fierce political battles over not only the future of the city's school system but also over the future of the city itself. Much of this struggle has taken place at the state-level through conflict between liberal supporters of school choice who want to implement limited restrictions on charters in Detroit and libertarian groups that view any such restrictions as impinging on the freedom of parents and students to choose their schools. While, as discussed in Chapter 5, these groups were largely aligned around the time of Governor Snyder's election, the reality of Detroit's education landscape following the lifting of the charter cap caused a break in this alignment. This break came about as liberal supporters of charter schools beginning to push towards a system of 'choice with guardrails' in the face of a charter school system characterized by rampant competition between schools.⁷⁵

⁷⁵ Director, Philanthropic Foundation, Michigan, 6 February 2015

While it began after the lifting of the charter cap, conflict between these groups came to a head as the city emerged from bankruptcy proceedings and it became increasingly apparent that the school district would need an infusion of money in order to remain solvent. The timing of these two events resulted in a wave of editorials, including one by Governor Snyder himself, discussing how the reform of Detroit's schools was a necessary proposition for the 'revival' of Detroit (see AlHajal, 2014; Lessenberry, 2015; Riley, 2014; Snyder, 2015). This reflected the national narrative of charter schools as a method of urban revitalization as promoted by pop urbanists like Glaeser (Peck, 2016). As one editorial by Jack Lessenberry described:

The deficit is \$170 million. Worse, the district owes \$53 million to the state pension system and apparently hasn't made a payment since last fall, which in turn means more penalties.

Clearly, this can't go on financially. And there's a deeper problem: If Detroit is ever going to be a real city again, one where normal people want to live, it needs a public school system where they can confidently put their children.

It's as simple as that. Even if you cleaned up the crime and brought in boatloads of new jobs, few other than hipsters and the elderly will live there unless there are schools they can trust (Lessenberry, 2015: para. 4-6).

The opportunity to assert control over the future of the DPS through a state 'bailout' combined with the heightened attention given to schools in post-bankruptcy Detroit set up a conflict between opposing factions over the future of schooling in Detroit, and by extension over charter school markets. More than that, as editorials like Lessenberry's highlighted, the struggle over Detroit's school system became an important site of conflict over who would define the future of post-bankruptcy Detroit.

Despite the financial struggles of the public district being the cause of the initial debate around the future of schooling in the city, the politics that unfolded following this revelation centred around how charter schools in the city should be governed. Indeed, as it became clear that new legislation and perhaps the end of emergency management was on the governor's agenda, groups began jockeying for position as they sought to define the future of schooling in Detroit. Most prominent in terms of media coverage was the Coalition for the Future of Detroit Schoolchildren (CFDS). This group brought together unlikely allies including a member of the elected school board, representatives from corporations such as Quicken Loans, philanthropic foundation employees, the president of Michigan's largest teacher's union, and charter school operators. Through public discussions and a published report the CFDS sought to advance a new model for the governance of charter schools that incorporated criticisms of the 'hypercompetitive' market system described above (Niquette, 2013). This was to be accomplished through the creation of a mayorally-appointed 'Detroit Education Commission' (DEC) that would be given oversight power over the opening and closing of all publicly-funded schools in the city. The CFDS also proposed the creation of common enrolment, data, and transportation systems to help Detroit parents navigate the overwhelming array of choices they faced when choosing a school (*The Choice is Ours*, 2015). While they did advocate for a return of the DPS' elected school board, the CFDS's proposals placed this board underneath the control of the mayorally-appointed DEC rather than re-establishing an elected governance model as the highest level of decision-making.

In doing so the CFDS put forward a vision for a managed, technocratic market that aligned with other systems of governance that had recently been put in place the city and that reflected the national consensus on urban revitalization through market rule (Peck, 2016). For

example, Akers (2015) and Safranksy (2014) have described how the delivery of public services in Detroit now follows market activity, targeting public investments at areas with active real estate transactions rather than determining these investments through democratic deliberation. The CFDS's proposal reflected this larger movement in the city towards governance through market technocracy. Notably, they proposed that the mayor appoint a 'nonpartisan' committee to control the DEC which would "serve as a gatekeeper for opening, converting, or closing schools" (*The Choice is Ours*, 2015: p. 13). The group further elaborated on how the DEC would fulfil this gatekeeping role, writing that "New schools will be selected on merit. Among other roles, [the DEC] will conduct an annual analysis of demographic trends and school performance to identify where better schools are needed" (*The Choice is Ours*, 2015: p. 13). The system proposed by the CFDS would therefore have moved the control of schools out of the hands of an elected body and put schooling under the aegis of mayoral appointees who would govern through ostensibly-neutral, data-oriented approaches, thereby attempting to drown out the politics surrounding the market in a wave of data. The CFDS vision therefore reflected what Barry (2002) and Ouma (2015) refer to as the post-politics of markets, where data and expert opinions are mobilized to present market orders as apolitical.

The CFDS was not without its critics in the city and within the larger public education community. This became clear when a member of the CFDS resigned midway through its deliberation process, writing that:

those that lead this effort have prioritized preserving the EAA, for profit education ventures and charter schools over educational expertise, common sense dialogue and student centered, data driven decisions (Lightfoot, 2015: para. 16).

This accusation that the leaders of the CFDS leaders had formed the group with a solution already in mind was bolstered when Governor Snyder appointed Paul Pastorek, the state superintendent who oversaw the creation of New Orleans system of charter schools and a paid employee of the Broad Foundation, as his liaison to the group (Marshall, 2015). The CFDS were also criticized as a group of elites who lacked democratic legitimacy in presenting themselves as the representatives of Detroit.⁷⁶ When faced with this criticism, co-founder Tonya Allen responded: “it is not a public coalition, it is a private coalition of people who have decided who they are going to set forth recommendations... you should do the same.”⁷⁷

At their root, many of these criticisms were grounded in a simple question posed to Allen at a meeting of the DPS school board: “The real question is why can’t democracy function in Detroit? Period!” Such criticisms were waylaid by Allen’s narrowing of the terms of engagement through her own question: “What’s more important: winning or being right?” and her argument that there was no point in rehashing the past.⁷⁸ Similar rhetoric was used in other discussions of the future of DPS. For example, the CEO of Excellent Schools Detroit, Dan Varner, when asked how a system of oversight that coordinated enrolment, transportation, and data within a set geographic boundary differed from the functioning of a traditional school district, stated:

I would just argue that the cat is out of the bag like the genie is out of the bottle, right? The notion of going back to DPS is so, I don’t even know how you would do that at this point... politically and practically that doesn’t make any sense.⁷⁹

⁷⁶ Although it must be noted that the group included a state representative from Detroit and a member of the elected school board.

⁷⁷ Personal observation. Meeting of Detroit Public School board, Michigan. 2 February 2015

⁷⁸ Personal observation. Meeting of Detroit Public School board, Michigan. 2 February 2015

⁷⁹ Personal observation. Future of education in Detroit: A panel discussion, Gerald R. Ford School of Public Policy, Michigan. 23 October 2014

In this manner, and through the disenfranchisement of Detroit voters discussed earlier, attempts to restore local school district control were forestalled as politically impossible, or distractions on the path to ‘winning.’ This set up the CFDS as the (only legitimate) voice of Detroit in the education debate, a status that was later enhanced by their close allegiance with Mayor Duggan, who lent his public support to the group (Hawkins, 2017).

Ultimately however, the political group that most hotly contested the CFDS’s plans were libertarians who viewed the proposal for a Detroit Education Commission as an attack on school choice and on charter school markets. Rather than being concerned with stories of a marketplace dominated by school closures and fierce competition for students, for these groups the future of the city of Detroit was secondary to the preservation of parental choice. In a tongue-in-cheek move, the DeVos-funded Great Lakes Education Project (GLEP) formed its own coalition, the Coalition Opposed to the Detroit Education Commission, which included libertarian and neoliberal organizations such as Americans for Prosperity (Michigan) and the Michigan Freedom Fund, charter school lobby groups such as the Michigan Association of Charter School Academies, and a number of charter school operators. This group set themselves up in opposition to the CFDS, stating that:

We strongly oppose the creation of a Detroit Education Commission that will hamper educational choice and create an additional educational bureaucracy ripe for political capture. Parents, not politicians, should be empowered to make choices for their children (Naeyart, 2016: para. 3).

For this coalition, any local control over schooling was a non-starter and a return to a past that was best left behind. Members of this group went so far as to publicly call for the end of DPS as

an institution. Betsy DeVos herself even penned an editorial that stated “we need to retire DPS” and that:

Rather than create a new traditional school district to replace the failed DPS, we should liberate all students from this woefully under-performing district model and provide in its place a system of schools where performance and competition create high-quality opportunities for kids (DeVos, 2016: para. 2).

Thus, while the CFDS called for a technocratic fix to help stabilize a market system they viewed as running amok and supporters of the traditional school district issued a call for democratic control, libertarian groups instead called for the dissolution of the city’s school district and its complete replacement by a marketplace of schools.

As the financial pressure on the DPS grew more acute and the need for state intervention became clear, the politics around the future of Detroit’s schools focused on the CFDS and libertarian proposals. The debate became particularly heated when Governor Snyder’s proposed plan for the future of Detroit’s schools was leaked to the media. This plan adhered in some ways with that of the CFDS but crucially departed from a return to an elected school board. Instead, Snyder proposed that the school board be filled with members appointed by himself and the mayor of Detroit. Snyder also proposed splitting the school district into two, with the existing district taking on the DPS’s debt and a new, reconstituted district taking over DPS schools. The governor’s plan did include a version of the DEC, however, which provided some support for the CFDS’ vision (Zaniewski, 2015). When leaked, Snyder’s plan was panned both by Detroiters for continuing state management of DPS and by the libertarian right for potentially impinging on parental choice.

While the debate waged for several more months, the final legislative ‘fix’ for DPS was determined during a marathon legislative session that lasted until 4:30 am (Gray, 2016). As Armen Hrachian (2016) of Excellent Schools Detroit recounts in a blog post revealing the inside machinations behind the vote, the Democrats in the legislature repeatedly pushed for the DEC and offered compromise bills to Republicans. While this resulted in a bill that passed in the State Senate, these proposals were ultimately non-starters in the State House which was staunchly opposed to the DEC. In the end, the version of the bill that made it through both the House and Senate did so with entirely Republican votes and with every Detroit legislator voting against it. The legislation split the district into two as desired by Snyder but did not include any provisions for the DEC, any limits on the opening and closing of charters, or any system for coordinating the delivery of services. Furthermore, while a return to an elected school board was included in the legislation, the actions of this school board, including the hiring and firing of key bureaucrats, remained subject to state control via the oversight of a gubernatorially-appointed financial review commission (Gray, 2016; Pratt-Dawsey, 2016). Thus, while the CFDS proposed a vision for schools that fit with the vision of market governance through technocracy, ultimately the status quo of state control combined with the unrestricted operation of charters was preserved.

This result has been largely attributed to the power of the DeVos family’s lobbying and wealth. The *Detroit Free Press* reported that, in the wake of the DPS vote, the DeVos family contributed \$1.45 million to the Republican party and individual Republican candidates; this included \$655,000 in the week immediately following the vote (Henderson, 2016). Inside accounts from members of the CFDS also point towards the influence of the DeVos family in shaping the final legislation (Barnum, 2017; Harris, 2016; Hrachian, 2016). For example,

Hratchian (2016) describes the politics leading to the bill as the result of lobbying from DeVos-funded groups:

The reality is this came down to a clash of ideology that is worthy of honest debate. My opinion, some are fighting for an inequitable and destabilizing form of choice long ago discredited and abandoned in other cities and states around the country (MAPSA, GLEP and the DeVos family). The rest of us are fighting for higher quality, fiscal and neighborhood stability, and equitable choice for Detroit's families.

Attempts to place 'guardrails' on Detroit's schooling market through the DEC therefore ultimately fell short despite the effort put into promoting the CFDS's report. While the unrestricted operation of charters was met with a backlash from many in the city, the power to determine the future of Detroit's schools and to shape the future of the city lay with the state government and the Republican party.

Despite their failure however, these attempts illustrate the contested terrain that education presents for market-making projects. Groups that were largely supportive of the use of markets in education and that admitted that they had 'purely pushed'⁸⁰ for markets in the past, ultimately came to question this ideology of market rule when confronted with the reality of the mass displacement of children due to school closures. As the CFDS wrote in *The Choice Is Ours* (2015, p. 12):

How can students learn in an environment that is so unstable, when they don't even know which school they will be attending next year? How can families make sense of a system

⁸⁰ Director, Philanthropic Foundation, Michigan, 6 February 2015

where the expectations are so different, where what might be considered 3rd grade reading in one school is considered 5th grade reading in another?

In this context, the constant news stories of children being displaced by school closures (often mid-school year with no warning) proved too powerful for many pro-market actors to ignore. In contrast to the market-led delivery of public services described by Akers (2015) and Safransky (2014), the importance attached to schooling and children resulted in a backlash against market rule even from elites who had largely been supportive of markets in the past.

That this backlash did not result in material change draws attention to the importance of paying attention to the nature of power and broader social struggles in shaping the functioning of markets. While resistance to market rule over schooling was real and could be read as a Polanyian double-movement against the commodification of social life, the fact that the power mobilized to pacify this resistance was successful requires an understanding of the specific social dynamics of Michigan. Certain options, such as a return to an elected school board, were simply off the table due to a history of disenfranchisement that has shaped both the school district and the city as a whole. Meanwhile, attempts to create some sort of oversight over the operation of charter schools fell apart as power and money was mobilized to prevent even a restricted, technocratic method of market management. These visions, and their final outcome, were all tied into wider social struggles over the city. For example, the push for a return to elected board was linked to a broader resistance against emergency management and the privatization of city services by groups like We the People of Detroit, while libertarian groups tapped into years of hostility towards the city of Detroit and the deep pockets of the DeVos family. Without understanding how these groups related to the broader patterns of racial disenfranchisement, wealthy benefactors, and party politics in Michigan it is impossible to understand how the

backlash to the ‘hypercompetitive,’ ‘wild west’ marketplace in Detroit resulted in a preservation of the status quo.

6.4 Race, urban space, and schooling markets

The focus of previous chapters on struggles over schooling markets at the national or state-wide scale shed a light on the politics that set up the structures within which charter school markets operate. However, as has been demonstrated in this chapter, these markets do not work in

isolation but as embedded within the geographies that have long shaped the places they occupy.

In the Detroit region with its stark disparities of wealth and power, this has meant that some communities have been subjected to the extremes of market-shaping policies while others have been able to mobilize to prevent the encroachment of markets on their local school districts.

Thus, for some school districts with the power to shape the market for students, the emergence of this market is an opportunity, while for districts like Detroit the same market accelerates the disciplining power of austerity.

This situation reveals much about both the nature of markets as sites of social struggle and about how schooling markets in particular operate. Struggles over schooling markets in Detroit have been about far more than the delivery of schooling but also about the disenfranchisement of Black communities in Michigan, the emergence of technocratic, market fixes, and a hostility to the public delivery of social services that is rooted in a libertarian, market ideology. The uneven power available to different groups has meant that the shape of the charter school markets in Detroit has not been the result of individual decisions in the city, but of a wider ideological struggle over the future of the city itself, with material wealth used to both forge and maintain the shape of charter school markets in the face of political pressures to change their structure. This is important in relation to the arguments that charter school markets

serve as a tool in the ‘benevolent’ revitalization of cities (Davis and Oakley, 2013) and as a precursor to the return of capital to the city (Lessberry, 2015), especially given the national significance of Detroit’s restructuring. The fact that such market fixes have required the disenfranchisement of marginalized communities and the concentration of control in powerful actors is a clear illustration of who benefits from such market-making projects (Lipman, 2011; Peck, 2016).

At a regional level, the spread of markets and the willingness of different school districts to engage with them cannot be understood without paying attention to the racial politics that are central to how (and whether) different districts compete for students. Importantly, rather than being a neutral site where market actors have through their individual decisions created a segregated schooling system, racial power is central to the very structure of these markets. This can most prominently be seen through the disparity in the methods of market engagement available to different school districts and through the way the Schools of Choice policy is structured to allow suburban school districts to mediate whether they will open up access to Detroit students. Indeed, the importance of these policies can be witnessed in the way that districts like Grosse Pointe reacted to attempts to remove them and to thereby limit their control over market competition. This goes beyond merely reflecting existing racial and spatial dimensions however. As argued earlier, these markets do not simply passively reproduce racial geographies, but also actively remake them as they shape how students move throughout the metropolitan region and facilitate the displacement of existing communities from the city centre.

Furthermore, as Lipman (2013) has argued, the experience of different communities in the Detroit region fell along a spectrum of coercion and consent as the state sought to push the growth of charter school markets in the region — with some districts left no choice and others

only encouraged to participate through incentive programs. Given the fierce contestation by local community members against the state takeover and also by local elites reacting against what they viewed as ‘cutthroat competition,’ the roll out of markets in Detroit has required the coercive hand of the state in order to prevent this backlash from impinging on the operation of charter school operators. Thus, while schooling in Detroit was a contested terrain for market-making, uneven geographies of race and power meant that such contestation was unable to put in place even a limited, managerial fix. This has important implications for the future of the educational settlement in the city and elsewhere in the United States, signalling that perhaps Lipman (2013) was correct to argue that this settlement is not stable, but requires the use of coercion in a highly uneven manner. However, the story of markets for schooling, and indeed the continuing remaking of Detroit, is not a finished one and how these struggles will continue to unfold is far from assured.

Part 2: Conclusion

The three cases outlined in Part 2 of this dissertation illustrate how the creation of charter school markets in Michigan and Oregon has been shaped and reshaped through contestation and as they have articulated with local political dynamics. Importantly, the struggle over these markets has not only been over internal market dynamics but also over wider processes such as the future of American public schooling and the restructuring of Detroit. The functioning of these markets must therefore be understood as shaped by circulating geographies of power and expertise, ideological struggle, and place-specific political contexts.

Indeed, political struggles have been central to the development and functioning of charter school markets from their beginnings. Chapter 4 highlights how charter school policies emerged as an alternative option that bypassed longstanding resistance to voucher programs, with school choice advocates trading the autonomy of voucher programs for the political viability of charter school policies. The existence of charter school markets and their complex regulatory forms must therefore be understood as having been forged through broader ideological debates over market-driven education reforms, as those who believe in a pure, neoliberal ideology of markets have rubbed up against the long historical narrative that schools should be kept outside of market rule. Crucially, these were struggles, plural, that took different forms from state-to-state and district-to-district, as rapidly circulating policy models articulated with different political contexts.

Chapter 5 zoomed in more closely on how these struggles occurred on a state-to-state basis, using Michigan and Oregon as cases illustrating the importance of local political formations in shaping the functioning of charter school markets. In both Michigan and Oregon struggles over charter school markets were often fierce, but occurred along different ideological

lines and as rooted in the wider political environment of each state. In Michigan, a well-resourced libertarian movement drove much of the politics around charter school markets, relentlessly pushing against any restrictions on the autonomy of charter school operators. In Oregon, the struggle over these markets were centred around opposition to a system of local control which allowed school districts to control entry into the market. These struggles, and the types of markets they formed, had important impacts on how charter school markets in each state functioned. While Michigan is largely viewed as the ‘wild west’ for charter schools, with a multiple authorizer system that allows operators a great deal of power, in Oregon the balance of power is vested in school districts. Struggles over markets and their systems of governance therefore have a clear influence on how markets function in ways that are inextricably geographic, with market institutions built upon place-specific geographies of power.

The struggle over markets illustrated in Chapter 6 occurred at a regional, rather than state, level but also highlights how markets must be understood within their geographic context. The case of Detroit’s charter school market shows how geographies of racial segregation have shaped where markets have been created and how they function. This dynamic is even more clear when the use of emergency management to create markets in Detroit is read in conversation with the relative freedom neighbouring school districts have had in reacting to the state-wide roll out of market-making projects. What can be clearly be seen when looking across the metropolitan region then, is that charter school markets are more than simply devices for governing exchange between students and school operators — they also function to discipline behaviour and accelerate inequities as different actors shape markets to advantage their positions. Markets are therefore not neutral, but key sites through which a multitude of projects are advanced, contested, and reconstituted.

Chapter 7: Conclusion

Think of [schools] like your cell phone. AT&T, Verizon or T-Mobile may all have great networks, but if you can't get cell phone service in your living room, then your particular provider is failing you, and you should have the option to find a network that does work. (DeVos, 2017: para. 38).

As was outlined in Chapter 2, the ideology of market efficiency has been mobilized to remake an increasing array of areas of social life. The comments of Secretary of Education Betsy DeVos illustrate the reach of this worldview and how it is put to work to create market-based reforms. Returning to the Stuart Hall quote which began this dissertation, the ‘market experience’ has become the most universal experience of economic (and perhaps social) life and for this reason the “everyday words, phrase and idiomatic expressions” that are used to express market relations have “become the model of other social and political relations” (1986: p. 38); in other words, the efficiency of markets has become common sense in both the vernacular and Gramscian use of the phrase.

This dissertation has attempted to disrupt this common sense through situated research into actually-existing markets — to go beyond simplistic descriptions of how charter school markets function and reveal how they are interwoven with the sociospatial dynamics that shape processes of exchange. This has been accomplished through a theoretical framework which posits that markets are sites of struggle over not just internal market relations but over broader political dynamics. Through using the three, related, cases described above as ‘windows’ into market processes, I have traced how the functioning of charter school markets in Michigan and Oregon can only be understood once their complex histories and geographies are considered. Furthermore, by reading across the cases of Michigan and Oregon, the importance of geography

in shaping these markets has been highlighted through an examination of how the structure of each state's markets has been produced by the articulation of circulating geographies of power with place-based politics and associated geographies.

Given the complexity of these markets outlined above, in this final section I think across the theoretical arguments made in Part 1 and the empirical cases outlined in Part 2. I do so in order to clarify how the dissertation as a whole contributes to debates within economic geography and the sociology of education. As an organizing frame, I group these contributions into four key themes: (1) charter school markets as sites of ideological struggle, (2) educational values and market-making on contested terrain, (3) market hegemony, and (4) markets as space (re)making. These discussions are followed by a concluding section which further discusses (1) the emerging educational settlement and the role of resistance, (2) ramifications of this study for debates with the sociology of education, and (3) ramifications for the future directions for the geography of markets.

7.1 Key themes

7.1.1 Roll out, resistance, and the forging of markets through struggle

In Chapter 2 I outlined my approach to studying markets, seeking to understand how (or whether) social struggles for, against, and over market rule have shaped the functioning of charter school markets. As explored in the three cases-as-windows described in Part 2, it is clear that social struggles have had a clear and important impact on these markets. Indeed, the functioning of charter school markets is inextricably linked to political contestation and it is difficult to understand them without taking these politics into account. While a clear ideological vision for markets has motivated the roll out of charter school policies across the United States, the actually-existing charter school markets in different states, regions, and districts reflect the

results of power struggles over their form. Notably, variations in the governance structures which organize exchange on these markets (e.g. type of authorizer system, accountability regimes, etc.) can have huge impacts on not just the scale of charter school markets but also on what type of actors participate in them and their level of autonomy from regulation. Studying the struggle over markets is therefore central to understanding how and why markets take different forms, as well as the likely consequences of a market's operation.

The chapters above have illustrated how charter school markets have, from their very beginnings, been shaped by political contestation. Indeed, the popularity of charter school policies was based on their position as a compromise policy that could help break a deadlock between those supporting voucher programs and their opponents. As described in Chapter 4, charter schools were designed as a hybrid approach to creating markets “while still preserving the basic principles of public education” according to the sponsors of the nation's second charter school law (Hart and Burr, 1996: p. 38). The very core of the charter school idea, a market where the private delivery of publicly-funded schooling is married to a system of public oversight, was the result of thirty-five years of political battles which had prevented the implementation of voucher programs in the United States. The structure within which charter schools operate was therefore a direct result of attempts to keep more radical market-based options from achieving popularity — of an explicitly political struggle

Even beyond this central element, the specific market forms that characterize different state's charter school markets are the result of a running state-by-state battle over different governance models. While libertarian networks and the Democratic Leadership Council promoted charter schools across the country, local groups fought over the specifics of how charter school policies would be implemented in each state. The level of funding, who should

authorize charter schools, whether private schools could convert to charters, and a myriad of other political decisions over the details of charter school markets has shaped how these markets function into the present day. As highlighted through the Michigan and Oregon cases, these different market forms emerged as the result of ideological struggles over contrasting market visions, with Michigan's market shaped by a strong and well-resourced network of market ideologists and Oregon exhibiting a far more tentative engagement with this vision.

Crucial to these struggles has been the uneven terrain of power available to different groups. While the markets studied here contain diverse actors with vastly different visions for how charter school markets should function, or even whether they should exist, the power to determine market structures lies with those who can bring resources to bear on these struggles over market forms. This was clearly the case in Detroit where the elected school board was kept out of the debate over the future of the local school system and where the power and influence of the DeVos family was used to ensure that charter school markets would continue to function along the status quo. Importantly, the resources mobilized in struggles over Detroit's charter school market were external from the market itself, with emergency management from the state, the DeVos' personal fortune, and other philanthropic dollars all mobilized to shape the market's internal functioning. This highlights how the power to shape markets does not have to come from within these markets, as different actors bring in outside power to shape markets to fit their preferences. It also signals the difficulty in refusing market-based solutions to social problems, with the Oregon case revealing the relentlessness of the drive towards an idealized market.

That charter school markets became sites of interest to powerful actors highlights how they can best be understood when placed within their social, political, and economic context. It is not a coincidence that charter schools emerged at the same time as the ascendance of the

Clinton/Blair ‘third way.’ Nor is it an accident that emergency management has been used to restructure both Detroit’s municipal government and its school system within a short time period. As discussed in Chapter 3, schools and schooling markets are important sites where multiple social dynamics coalesce and the politics of these dynamics (gentrification, racial segregation, etc.) play out in and through charter school markets. This means that the struggles over schooling markets have often been related to broader political dynamics; for instance, as outlined in Chapter 6, patterns of racial segregation are central to how the metropolitan region’s market for students has evolved or, as outlined throughout the dissertation, the future of charter school markets has been linked to wider discussions about how to achieve the meritocratic promise of schooling.

The ways in which charter school markets have become sites of proxy battles over broader social and economic processes also reveals the complexity of the politics that shape these markets. As Fraser (2013; 2014) argues, the politics of markets go far beyond a simple market/anti-market divide and, instead, incorporate an array of competing pressures that play out through markets. This means that there can be divides even between groups that are considered largely aligned on wider issues. The Gates and Walton foundations have both spent hundreds of millions of dollars supporting charter schools, but have recently come into conflict over the use of voucher programs (Mulvihill, 2017). Such fractures can manifest within markets as struggles over specific aspects of how a market is governed such as the debate over the proposed Detroit Education Commission outlined in Chapter 6. These battles can be fierce precisely because their ramifications echo outside of the exchange that takes place within a particular market, with charter school markets embroiled in struggles over the relationship between church and state, over patterns of municipal restructuring and displacement, or over the methods through which

marginalized communities can achieve educational empowerment. Again, the structure of charter school markets is hard to understand without taking these politics into account.

This is not to say that internal struggles do not shape markets or that the market/anti-market divide is not a source of political contestation. The resistance of the elected school board to the imposition of charter school markets in Detroit and similar struggles in places like Chicago, New York and Los Angeles highlight how resistance to market rule can have important effects including driving away pro-market actors such as the Walton Foundation in Chicago (Sanchez, 2016). Indeed, the networks that are being built between groups struggling in different cities through organizations such as the Journey for Justice Alliance and the connections being made over the contestation against market rule in multiple domains (schooling, water, housing, etc.) made by groups like We the People of Detroit Community Research Collective, illustrate that an anti-market politics exists beyond the particulars of an individual market. As such the politics of charter school markets in different sites throughout the United States are linked not only by the political actors who promote charter schools and market-based policies but those opposed to them.

When taking all these forces into account, the central role that political struggles have played in shaping the functioning of charter school markets is clear. Despite the neoclassical and neoliberal focus on what happens when actors come together to exchange (in charter school markets this is when a student picks a school), the real action happens before the act of exchange takes place. That single act of exchange is instead organized by a variety of structures that have been fought over, reshaped, and contested throughout the history of a charter school market's evolution. The options available to a student when picking a school are the end result of decisions made by those who control entry to the marketplace, the level of coordination of the

marketplace, a student's personal mobility and power, and a myriad of other factors. Indeed, the very fact that they must make a choice at all is often the result of political struggles over traditional public schooling that have led to the widespread school closures as described in Detroit. Going back to the discussion at the end of Chapter 2, where I argued for tracing outwards from the act of exchange, this dissertation has paid close attention the terrains of struggle over the networks, institutions, and ideas that act upon this act of exchange. In doing so I have drawn attention to how the expressly political struggles between actors over charter school markets, and the uneven terrain it occurs upon, have shaped how charter school markets organize exchange.

7.1.2 Educational values: Market-making on contested terrain

As argued in Chapter 3, schools are key state institutions that fulfill a number of important roles regardless of the method (market/non-market) through they are governed. This has meant that, despite Betsy DeVos' assertion that schooling should function like cell phone provision, the nature of the commodity (schooling) being exchanged matters.⁸¹ For many parents, the shift to a market-based system of schooling is not simply a change in service delivery but a threat to, or opportunity for, their child's future; for local elites, schools are often seen as key inputs into regional labour markets and as an integral part of economic development; and, for education corporations and financiers, schools are seen as sites of capital accumulation. These often-contradictory views have placed schools (and therefore charter school markets) under considerable pressure. As this dissertation has illustrated, such pressures have directly shaped the

⁸¹ DeVos has clearly never actually tried to switch cell phone providers mid-contract if she believes it is simple, which lends a certain irony to her use of cell phone provision as an example of an idealized market.

governance structure of charter school markets as different actors have used their power to shape these markets to gain an advantage. Importantly however, while the neoliberal ideology of efficient markets has perhaps the most power behind it (especially in places like Michigan), the roll out of markets in its image has not occurred over a smooth terrain but one marked by the values and dynamics specific to schooling.

That schooling has marked a contested terrain for market-making projects can most clearly be seen in the historical view presented in Chapter 4 and briefly touched in the section above. The promotion of markets for schooling is not a new project but one that has been promoted by every sitting president since Reagan. Yet despite the power behind these efforts it took more than a shift towards a market ‘common sense’ and the wider neoliberalization of the state to promote markets in schooling — it also took a crisis narrative that paired stories of America’s failing schools with concerted effort to paint markets as the highest expression of democracy (Apple, 2001; Schram, 2015). Indeed, the past three American presidents have all referred to education ‘as the civil rights issue of our time’ in speeches used to promote market-based education reforms. In doing so, they have equated the exercise of choice in a market with values of social mobility and social cohesion and thereby painted markets as the means through which these values can be realized. This move towards promoting personal choice in a marketplace as the reflection of educational values has been used to displace longstanding concerns about the racial and class disparities of America’s schooling system. Indeed, Scott (2013) has argued that notions of empowerment have been appropriated by pro-market reformers to signal that marginalized groups can best be empowered by granting them the ability to choose a school rather than control over the practices of schooling or its institutions of governance.

The effect of this reluctance to adopt markets in education, and the need to accommodate the roots of this reluctance within the creation of charter school markets, can be seen in the very fact that charter schools and not voucher programs became the policy model that spread throughout the United States. In Michigan, Oregon, and many other states across the country, charter schools only became an option after numerous failed attempts to implement voucher programs. As multiple promoters of charter schools have recounted, their initial popularity was based on arguments that the government's oversight of charter schools would prevent the worst tendencies of markets in terms of racial segregation and in allowing religious schooling. As the author of the original charter school law wrote: "The system proposed here is a competitive system... But it is also a public system. The schools will serve public objectives and will be publicly accountable for the public support they receive" (Kolderie, 1990: p. 10). These arguments about the 'publicness' of charter school markets was what allowed them to move forward, and this meant that markets for publicly-funded schooling functioned vastly differently than they would have under voucher systems.

The values ascribed to education also remain central in struggles over charter school markets today, despite decades of marketization. In part, this is because institutional histories matter in the functioning of these markets. For example, Michigan's ban on state funding for religious schools dates to the 1800s and has constituted a barrier that has prevented the implementation of voucher programs as well as religious organizations from opening charter schools.⁸² In Oregon, the continuing importance of school districts as the venue for making

⁸² For example, when Michigan's charter school law was passed a religious home-schooling network was authorized to start a charter school but quickly had its charter revoked through a court order (Goenner, 2011).

decisions about education in the state has helped prevent the uncontrolled growth of charter schools. Charter school markets have not destroyed these institutional histories then, but have instead reworked them to create new, hybrid market institutions that reflect them.

More particular to the values ascribed to schooling is that attempts to move further towards the neoliberal ideal of a market have rubbed up against an opposition that has noticed the contradictions between existing market systems and these educational values. In Michigan, this values-based resistance to schooling markets became clear as Governor Snyder's agenda began to falter following the removal of the charter cap. Snyder's most radical proposed reforms such as reworking school funding to function on a course-by-course basis and allowing the free movement of students between school districts were met with widespread opposition, even from those who had largely supported the growth of charter schools. This opposition drew upon people's sense of attachment to their local school and to its role as a site of social cohesion. While pro-market advocates derided these people as poor consumers, they instead espoused a view of schooling that could not be reduced to a market relation.

In Detroit, this dynamic of other educational values pushing up against a market ideology could also be seen. While ultimately unsuccessful due to the political power of the DeVos family, the move from 'choice' to 'choice with guardrails' on the part of philanthropic foundations active in the city points to the potential limits of market rule. Narratives of schools closing on children mid-year, of parents overwhelmed by predatory actors, and of the disenfranchisement of an entire city, illustrated the tensions between a market approach to schooling and its perceived role in promoting social mobility. The Coalition for the Future of Detroit Schoolchildren's narrative made this strain clear, writing:

When so many are in charge, there is no accountability. Schools (DPS and public charters) that have performed poorly for years remain open without being held accountable for quality. In fact, some low-performing public charter schools are actively recruiting students and, in some cases, opening new schools. That is not good for kids and not good for the city. We need great schools that are striving for quality instead of low-performing schools competing for a shrinking pool of students. (*The Choice is Ours*, 2015: p. 10).

Choice on the marketplace alone was not enough to satisfy this coalition. Business leaders concerned with economic competitiveness and philanthropists concerned with the actions of the worst charter school operators, pushed back against the ramifications of the unrestricted market model seen in Detroit — albeit while promoting a technocratic market fix.

Throughout all these examples it is clear that the fact that charter school markets are markets for *schooling* matters. While Barry (2002) and Ouma (2015) argue that markets are often characterized by a strong anti-politics, the realities of what (even a commoditized) schooling signifies to different actors has meant that market-making projects have had to account for educational values of democratic equality, social mobility, and social efficiency (Rizvi and Lingard, 2009). As such, the politics of these markets are far from hidden but, instead, are ever present and have had real impacts on how charter school markets function. In Oregon, the continuing presence of school districts as the arbiters of market entry are central to the functioning of its charter school markets and the result in a strong belief in local control over public education. In Michigan, the most extreme market forms have been limited to places like Detroit where the state government has complete control while richer communities are able to successfully resist market reforms. Thus, while charter school markets have been rolled out by powerful actors motivated by a belief in market efficiency, alternative values particular to

schooling have also shaped the ways in which these markets function, shaping where markets are constructed and the forms they take.

Values specific to education have not only been a resource to those resisting markets however. Pro-market reformers have also tapped into notions of individual empowerment to make the argument that markets are the path through which social mobility and democratic equality can be achieved. For example, in Michigan the ideal of parental choice as a means of escaping a failing school system has been mobilized from the time when Engler used the story of 8 year-old Rory who was ‘trapped’ in his local school to argue for the need for charter school legislation. As Fraser (2013) has argued then, the direction of struggles over schooling markets are not predetermined, and those both rolling out and resisting markets must appeal to those seeking to advance different values ascribed to schooling. No matter the direction of change however, the creation of markets and struggles over their form is shaped by what is exchanged in charter school markets: education.

7.1.3 Hegemony, contestation, and schooling markets

The dynamics discussed so far, markets as sites of struggle and the role of educational values in these struggles, together reveal another important aspect of the cases above: the relentlessness of market-making projects. While the advancement of schooling markets has been, at times, waylaid by resistance efforts, the appointment of Betsy DeVos to the position of Secretary of Education and her stated support for voucher programs signals that the market vision is ever on the move. This was predicted by those supporting the implementation of charter schools in Michigan and Oregon in the 1990s. For example, TEACH Michigan argued that the charter school law “made it much easier to advocate extending the same financing system to independent schools” (DeWeese, 1994: p. 32) and an Oregon thinktank researcher referred to

charter schools as “the first politically doable chink of the armor in the public school monopoly.”⁸³ While the arguments made in sections 7.1 and 7.2 above highlight that this movement has always been partial, it is important to also note the general trend: an ever-moving push for markets and new market forms.

The persistence of the move towards charter school markets as a nationwide policy intervention is witness to this fact. In Oregon, a charter school policy was passed only after two previous attempts to move the legislation through the state legislature failed. More revealingly, in Washington State there were seven failed legislative efforts, three failed public referendums, and the Bill and Melinda Gates Foundation spent millions promoting charter schools before the state finally passed a charter school law in 2012 (Cohen and Lizotte, 2015). Non-compliance with this new ‘common sense’ policy has become increasingly untenable and requires constant maintenance of non-market methods of providing public education.

The drive towards markets has not only included promoting new markets but also deepening the level of market rule and the continual testing of systems that attempt to control market competition. Oregon is an excellent example of this process, with the system of local control described in Chapter 5 targeted both by conservative legislators and by for-profit companies looking for loopholes in the system. This has occurred despite the fact that the local teachers’ union and other education professionals have attempted to put in place a system of online schooling that can compete with for-profit schools like the Oregon Connections Academy; as a representative of Oregon’s teachers’ union put it: “we are pushing back and playing defence.

⁸³ Thinktank researcher, Oregon, 18 June 2015

But they got to own the landscape.”⁸⁴ Even in Michigan, where libertarian groups have been able to largely set the agenda, this consistent push towards deepening market rule continues. This was best exemplified by the proposal to move school funding to a course-by-course basis in order to heighten the competition between schools in a context already referred to as ‘hypercompetitive’ or the ‘wild west’ of charter schools. Resistance has shaped these pathways, but the direction of change towards more markets and an increasing level of market rule is clear.

This consistent spread of markets, and its relentless march forward, should be understood within the arguments of Hall (1986) and Burawoy (2003) about the ways in which market relations have become the model for other relations — a new common sense. As Hall has argued:

The market is hypostacized: it ‘thinks’ this, ‘does’ that, ‘feels’ the other, ‘gets panicky’, ‘loses confidence’, ‘believes’ . . . Every social relation can be bought and sold, has its ‘price’ and its ‘costs’. Everything can become a commodity. Nothing escapes the ‘discipline’ of the ‘bottom line’. Exchange value is value. Nobody just ‘shops’: every one ‘competes in the marketplace’. Exercising ‘consumer choice’ is the next best thing to freedom itself (Hall, 2011: p. 12)

The internalization of consumer choice as freedom itself discussed by Hall has largely left those resisting the hegemony of this vision ‘playing defence’ as put by the union representative in Oregon. This has meant that, despite the struggles discussed above around educational values, these values have been reoriented in a manner that fits the new neoliberal common sense rather than fully disrupting it (Eastman et al, 2017; Scott, 2013; Sondel, 2015). This is of course not

⁸⁴ OEA representative, Oregon, 15 July 2015

monolithic, and groups like We the People of Detroit and the Journey for Justice have attempted to fight back against the marketization of schooling writ large. Yet these efforts have yet to coalesce into an effective counterhegemonic resistance that has halted the growth of markets. The hegemony of market rule in education marches forward even if it does so in hybrid forms and in a contested manner.

7.1.4 The spatiality of markets

The role of space and place in the functioning of markets is also clear in the cases reviewed above and marks another central theme of this dissertation. In exploring the circulation, creation, and contestation of charter school markets, space and place have often been central to both the functioning of markets and of struggles over their form. Notably, existing spatial relations have helped produce the uneven geographies that characterize charter school markets, spatial boundaries have constituted a terrain of struggle where these markets have been fought over, and the politics of place have both remade charter school markets, and been remade through them.

The most obvious role space has played in the functioning of charter school markets is in mediating how charter school policies have been implemented in different states. While charter school policies were promoted through national advocacy networks with extensive resources at their disposal, the shape these policies took and the markets they created depended on the articulation between these networks and the place-based politics of the states where these networks touched down. As scholars of policy mobilities have argued, it is this relationship between fixity and mobility, between what I have referred to as the circulating geographies of power and the politics of place, that produce variations in market form between places like Michigan and Oregon. The spatial relationships that have shaped charter school policies ‘along

the way' as they have been moved through these networks and implemented in different places have been an important element of their evolution.

Less obvious is the role that the process of boundary drawing has played in charter school markets. However, the clear demarcation of spatial boundaries and the exertion of control within those boundaries has been a strategy of those seeking to place restrictions on the actions of charter school operators. This has been the case in both Michigan and Oregon, with school district control over charter openings the central feature of the Oregon system and suburban school districts using their ability to control the entry of out-of-district students to shape their engagement with markets in Michigan. The ability to draw the spatial boundaries of a market has therefore been a central element through which markets are defined and struggled over. For instance, in the initial construction of markets in Oregon, the tight spatial control of markets was used to prevent the incursion of for-profit actors and large non-profit chains; however, as virtual charter schools used technology to evade these boundaries, they were able to fundamentally change the power dynamics of the market. In Michigan, Governor Snyder attempted to reduce the power of school districts in a similar manner through the 'Any Time, Any Place, Any Way, Any Pace Program' which would have delinked funding from individual schools but was ultimately unsuccessful.

These processes of boundary drawing are also essential to pay attention to because, contra to theories which assume the free movement of students in schooling markets, the ways in which spatial boundaries constrain available choices can severely shape the operation of markets. As Sheppard (1980: p. 206) has written "whenever choices are constrained, the possibility of misinterpreting observed behaviour as preference must exist." This is clearly witnessed in both the decisions made by students in Detroit and the movement of Detroit students throughout the

region. While the growth of charter schools in Detroit is often understood as a rejection of traditional public schooling, such choices must be understood as made within the context of a system of racialized segregation and state-based emergency management which has been weaponized to close schools and open charters (Pedroni, 2007). Similarly, the opening of certain options such as Oak Park schools to Detroit students while other boundaries remain closed (e.g. Grosse Pointe schools) or constrained (e.g. Van Dyke schools) has greatly shaped how Detroit's students move through the metropolitan region. How market boundaries are drawn and operate are therefore central to the functioning of those markets.

Finally, the simple fact that markets exist in places is an obvious, if underemphasized, factor in their functioning. The ways in which the implementation of charter school policies was shaped by the local context of states like Michigan and Oregon has already been established. The case of Detroit further highlights the importance of place-based politics and local geographies in shaping markets however. For example, the use of emergency management to promote the growth of charter schools in the city relied on the racial politics of a state that has been actively hostile to the majority-Black city. This illustrates how other geographic dynamics, such as racial segregation, play out through markets and shape their functioning. Simply put, the functioning of the Detroit region's charter school markets is impossible to understand except as shaped by the anti-Black racism that has long defined the region and which shaped not only the decisions of actors within these markets (such as school districts) but also these markets system of governance. The resistance of suburban school districts to the expansion of the Schools of Choice program and the barely-veiled racism of the Van Dyke school board are witness to this fact. These districts helped to preserve a market structure which allowed them to discriminate

against the largely Black residents of Detroit — a market structure which had racial power baked into its institutional walls.

Further illustrating the importance of place, schooling and charter school markets became an important site through which the future of Detroit was fought over. Numerous editorials (including one by Governor Snyder) positioned schools as the next frontier for the remaking of Detroit following the city's bankruptcy. The ability to forge the environment through which charter schools are regulated was therefore marked by a fierce politics where a technocratic market vision, a libertarian market vision, and a (largely-marginalized) non-market vision for the city were fought over. This meant that the functioning of the city's charter school market was shaped by more than just the specifics of the market, but by the relationship between this market and the politics of the place it exists within.

The functioning of the charter school markets discussed in this dissertation were therefore shaped by spatial relations and the politics of place. Space and place were far from an empty container for the functioning of charter school markets but instead guided their construction and structured their functioning. Indeed, the importance of spatial relations were far from hidden to those struggling over markets; as David Williams of Portland Public Schools testified to Oregon's House Education Committee (quoted in Chapter 5), the scale at which markets operate “creates a fundamental difference in how we operate oversight and accountability” (*Public Hearing, HB3044-2015*, 2015) and thus these scales were an important site of struggle. Similar to how sociologists of markets have long argued that markets are embedded in social relations then, so too are they embedded in spatial ones.

7.2 Concluding thoughts

7.2.1 Markets and the educational settlement

The growth of markets for schooling described in this dissertation has been rapid, but it is far from a complete process. Charter schools (and voucher programs) may be the policy option du jour for the Trump administration, but they still only enroll 5.44% of the students attending publicly-funded schools (*Public Elementary/Secondary School Universe Survey*, 2015).

Nevertheless, as argued above, the direction of the trend towards markets is clear and schooling markets, whatever their form, are likely to only continue to grow in scale into the future. For this reason, it is worthwhile reflecting on what the research presented above reveals about how or whether schooling markets have been able to balance the pressures described in Chapter 3.

According to Dale (2009), these include: (1) producing a skilled labour force as an input into capital accumulation and economic development, (2) creating social cohesion and order through instilling ideologies, and (3) providing a supposedly legitimate method of streaming children into social classes that can be used to justify the inequality of capitalism.

Building on the work of education scholars who have studied the growth of market-based education reforms, it is clear that the balancing of these pressures has required a shift in the notion of what constitutes democracy in schooling. By drawing on ideals of empowerment as experienced through individualized choice, markets have been promoted as means through which parents and students can achieve social mobility and control over their future (Apple, 2001; Cohen and Lizotte, 2015; Eastman et al, 2017; Scott, 2013; Sondel, 2015). This can certainly be seen in the rhetoric used in Michigan to help promote the roll out of markets. For example, as quoted in Chapter 6, Betsy DeVos argued that the complete elimination of the Detroit Public School district and the subsequent closing of its schools would actually help parents; writing “we

should *liberate* all students from this woefully under-performing district model” and allow them the freedom to choose charter schools (DeVos, 2016: para. 2, emphasis added). This reflects a nationally circulating discourse which is not limited to the libertarian right. While pushing for school choice policies at National Charter Schools Week for example, President Obama declared that charters are “an important partner in widening the circle of opportunity for students who need it most” (Obama, 2013: para. 3). In this way, the hegemony of the market ideology described and how it is used to construct markets as “the next best thing to freedom itself” (Hall, 2011: p. 12) has facilitated the acceptance of market rule over schooling.

Despite this rhetoric and its hegemonic power, the case of Detroit illustrates that there are limits to its effectiveness. Extreme market forms that lead to mass school closures, the displacement of students, and the disenfranchisements of entire cities have brought about a countermovement not only from those most affected by these reforms but also from elites who are opposed to the mass displacement of students (even while being generally supportive of markets). This can be seen in the Coalition for the Future for Detroit Schoolchildren’s (CFDS) attempts to put in place an oversight commission over charter schools in Detroit. However, their opposition was not directed at schooling markets in general, but at the specific market in Detroit which they perceived as emphasizing the freedom of charter school operators over the treatment of students. This led to the CFDS’s attempt to install a system of ‘choice with guardrails’ that would provide some oversight to a market that many within the group had helped to create.

This emphasis on resistance to charter school markets which does not challenge the ideology of the market can also be seen in a recent NAACP resolution calling for a moratorium on charter schools. Rather than pushing for a roll back of charter school policies, the resolution demands a moratorium until issues around charter schools such as increased racial segregation,

the defunding of public schools, and the mass expulsion of students are addressed. As the organization's president Cornell William Brooks stated:

The NAACP's resolution is not inspired by ideological opposition to charter schools but by our historical support of public schools – as well as today's data and the present experience of NAACP branches in nearly every school district in the nation (Statement Regarding the NAACP's Resolution on a Moratorium on Charter Schools, 2016: para. 9).

Rather than presenting an opposition to the notion of delivering schooling through a market or promoting an anti-market vision that views racial segregation and other ills as inherent to markets, the NAACP has instead called for a moratorium based on the results of market exchange. Beyond this resistance to the *effects* of markets, the continued pushback against voucher programs also suggests that there may be limits to how far the ideology of the market can be pushed before it disrupts the balance between the competing needs placed upon schooling; a tension that will likely play out soon given the Trump administration's stated support for vouchers.

However, there are efforts to resist the ideology of markets (not just the results of their operation) that exist today which are being undertaken by groups like the Journey for Justice Alliance and the Network for Public Education. The Journey for Justice's #WeChoose campaign discussed in Chapter 4 explicitly takes on the idea that individual choice can achieve values of democratic equality and social cohesion. It does so not through a struggle over specific markets but through a campaign that spans multiple cities and that draws links between the marketization of schooling and other processes of marketization as well as problems of police violence, mass incarceration, and gentrification; in this vision then, market-based schooling is opposed on counterhegemonic grounds and as rooted in struggles against racial injustice. Furthermore, in

response to the rise of charter schools, the group, along with the Alliance to Reclaim our Schools, has put forward their own vision for sustainable community schools geared around community engagement and culturally-relevant curricula (The Schools Our Children Deserve, 2016), As Hall and O’Shea (2013: p.13) write, and as witnessed in the actions of these groups, there is nothing inevitable about market hegemony but resistance does require coordination and an alternative vision:

Many groups, of course, do have cultural resources to resist these trends – and these include historic working-class solidarities, defensive organisations, strong local loyalties and a culture of mutual support... But these have not resulted in any coming together in a vigorous, effective response.

In the work of groups like the Journey for Justice Alliance there is potential for a counterhegemonic struggle that challenges the notion that markets are a means of achieving social justice and the values ascribed to education — market hegemony is not completely unchallenged but its contestation cannot be piecemeal.

It is here that the lessons of Chapter 4 on the mobility of charter school policies can perhaps be of use. As Temenos (2017) has written, the mobility of policy and associated contestations are not limited to the powerful, but instead there can also be ‘counter-mobilities’ which bring together geographically distant networks for progressive means. Groups like the Network for Public Education and the Journey for Justice have quite consciously begun this process by building networks of activists, researchers, parents, and teaching professionals to mobilize counter narratives and to link struggles across disparate sites. Much like the influence of libertarian and ‘third way’ networks were crucial in spreading charter schools across the United States, such networks could be (and have been) crucial in offering alternative education

reform plans, research which pushes against the standard narrative, and providing material support for anti-market struggles across the country.

What is clear from the cases above however, is that any challenges to the marketization of schooling, whether it is restricted to systems of oversight or takes the form of a challenge to the ideology of markets as a whole, occur on an uneven terrain of power. The ways in which the elected school board of Detroit was side-lined in discussions over the future of schooling in the city highlight the power that is often mobilized in support of market visions for schooling. This echoes De Lissovoy (2013) and Lipman's (2013) questioning of whether consent is even required for the roll out of the most extreme market forms or if coercion through the use of state power and disciplining technologies like standardized testing more accurately represents how markets are created and defended. Again here, there are questions about whether there are limits to how far coercive power can go in achieving stability, or whether teacher strikes seen in places like Chicago, mass 'walk ins' that have taken place across the country, and calls for action from groups like the NAACP can disrupt this use of state power.

The future of the neoliberal educational settlement is therefore not assured, even if it has achieved stability through the use of a discourse of empowerment as well as the coercive force of the state. There are signs of tension, especially in places like Detroit where the negative consequences of market rule are clear and apparent. As markets continue to be rolled out, potentially in new forms as promoted by Secretary of Education DeVos, these tensions are likely to be magnified. Whether they will result in any changes, or changes that go beyond a technocratic fix, remains undetermined and will depend on political struggle.

7.2.2 Space, place, and markets in the sociology of education

The approach taken in this dissertation, understanding how charter school markets have been forged through social struggle, has primarily been aimed at investigating the social underpinnings of markets. Nevertheless, this approach as well as the research described above may also have insights to offer education scholars interested in schooling markets and their effects. In this section I therefore discuss what an approach sensitive to the sociospatial constitution of markets has to offer the sociology of education.

The uneven geography of markets described above, and the factors which have produced it, is an important element for education scholars to consider. For one, this unevenness draws attention to the fact that marketization processes are not all alike and that, therefore, it is important to pay attention to the precise networks active in different sites and how they interact with place-based political contexts. This means that scholarship studying marketization processes in education cannot read their operation off from afar, nor can it narrowly focus on their functioning in specific sites. Instead, it is here that this dissertation's use of the policy mobilities approach may be helpful — a point recently made by Gulson et al. (2017) in an issue of *Critical Studies in Education*. By holding both fixity and mobility within the frame, the ways in which schooling markets in different locations are connected and diverge can be better understood within education scholarship.

The insights from this approach may also be useful for those seeking to resist the spread of market-based schooling reforms. As discussed above, activists are well aware of how markets are produced through circulating geographies of power and have sought to disrupt them through the creation of their own networks and by building alliances across place-based struggles. Beyond this however, the fact that market forms vary in their effects is important to keep in mind

when contesting the roll out of markets. Given the hegemony of the market ideology discussed above, and the power currently concentrated in a pro-market Secretary of Education, those opposed to market-based education may find themselves primarily playing defence as markets are created. In such cases, understanding how the particulars of market governance impact their functioning will be important. For example, in Oregon, that school districts were left in charge of entry into charter school markets had a profound impact on the evolution of that market. Where outright resistance to market rule is difficult, understanding the particulars of how charter school markets function and pushing for interventions that can limit their most negative effects may serve useful.

Finally, this dissertation's focus on how the act of exchange is shaped by institutional structures may be usefully read alongside existing work within the sociology of education which has focused on how markets function at the household level (see Ball, 2005; Cooper, 2005; DeSena, 2006; Pattillo, 2015; Vincent, 2017; Waitoller and Super, 2017). While I have explored the ways in which individual choices in charter school markets have been constrained by the governance structure of these markets, this work should be understood within the context of scholarship that has examined how individuals negotiate such constrained choices. As discussed briefly in the introduction, these approaches highlight important dynamics that shape exchange within charter school markets such as the uneven burden of choice based on lines of gender, race, and class (Cooper 2005; 2007; Pattillo, 2015). While the approach advocated here has pushed back against depictions of markets as made up of solely the decisions of individuals, we cannot be blind to the fact that individuals do make choices even within constrained circumstances such as an environment of mass school closures and exhibit agency in doing so (Patillo, 2015). There is therefore much to be gained from an ongoing conversation that examines how the choices of

individuals within markets interact with the political struggles over their form. This conversation would be useful for both those studying the geography of markets and the sociology of education.

7.2.3 Future directions for geographies of markets

Finally, this dissertation has sought to not only disrupt the taken-for-granted understanding of markets found in popular narratives, but to contribute to building the geography of markets. The specific arguments made in this dissertation regarding the spatiality of markets have been outlined in Section 7.1.4 above. Beyond these specifics however, there are important findings from this dissertation that can contribute to the future research agenda of the geography of markets. These include: (1) the methodological imperative to trace outwards from market exchange to the geographies of power that exchange exists within; (2) an attention to why existing market orders are disrupted, including to the desires of capital and the relentless of what Hall (2011) refers to as the neoliberal common sense of markets; and, (3) tracing the connections between individual markets and the production of new geographies.

As outlined in the introduction, the methodology used to study charter school markets in this dissertation drew heavily the policy mobilities approach. The attention of this approach to the ways that ideas are mobilized and recontextualized was useful in revealing how actually-existing charter school markets were shaped by the different networks promoting charter school policies, by the power available to actors in these networks, and by the articulation of these networks with the place-based politics of the sites where charter school markets exist. Such dynamics are not limited to charter school markets. For instance, Lai (2011) describes the different networks which shaped the construction of China's financial markets. In another example, the use of similar market technologies to reshape the salmon fisheries in both Alaska

(Hébert, 2014) and the UK (Cardwell, 2015) highlight the mobility of market governance models. That these processes can be found in diverse markets and distant sites signals that they are likely to a common feature in shaping the functioning of markets.

As such geographers studying markets must take Peck's (2012a) call for a comparative research program that documents similarities and differences in markets seriously, but they should go further and also trace the connections between markets — excavating how the power of expertise and technologies, the lure of financial capital, and different networks of travel are mobilized to create certain types of markets (particularly ones that adhere to the neoclassical model). As advocated in this dissertation, by beginning at the process of exchange and tracing outwards from this moment, how these networks operate upon markets can be revealed.

Crucially however, while insights from the social studies of economization/marketization can be useful in understanding these networks, it will be important for geographers to follow Braun's (2016: p. 258) suggestion and “establish both micro–meso and meso–macro connections” between these networks and the structures of capitalism so that the role of markets in wider sociospatial dynamics can be better understood.

The need to make such connections highlights the second point from this dissertation that is important for geographers studying markets: an attention to why markets are created, disrupted, and reshaped. Throughout the three cases described in Part Two I have highlighted how charter school markets are connected to wider power relations including processes of neoliberalization and capital accumulation. This has been accomplished through placing the networks promoting charter schools within the context of a wider hegemonic project of the marketization of social services and as linked to the profit-making imperative of groups like Pearson Education and their online charter schools. The relentlessness with which markets are

promoted and with which loopholes in market orders are sought illustrates that markets are dynamic institutions whose structures can be disrupted when they pose barriers to the desires of powerful actors. While Christophers (2015: p. 1861) asks “if [markets] in theory they are inherently contestable and fragile...why, in reality, are they actually so incredibly resilient?,” this question is taken from the viewpoint of studying markets that fulfil the needs of capital and which therefore are buttressed by power. Through studying charter school markets, which, as the case of Oregon illustrates, can sometimes present obstacles to capital accumulation and which often include some level of oversight, how the internal structures of markets are shaped by the desires of capital and the neoliberal common sense of unfettered markets is available for study.

The vantage point offered by charter school markets therefore points to the value of studying ‘weird’ markets or markets-in-creation. As those using the social studies of economization/marketization approach have highlighted, in many markets the technologies, ideas, and networks which serve to allow market exchange to occur are hidden by the ideological belief that markets are made up solely of the desires of buyers and sellers in a marketplace. In markets like charter school markets which are newly-created and where the social values ascribed to the commodity being traded prevent the social underpinnings of market exchange from being hidden, the connections between market exchange and power relations is readily apparent. As such, geographers studying markets may be able to find value in conducting research on sectors that are well outside what is considered to be the core of the economy and reading them in relation to cases such as studies of financial markets. Such cross-sectoral work could serve to fulfil the potential of the comparative approach advocated by Peck (2012a) and Muellerleile (2013).

Perhaps most centrally, geographers of markets would be well served to follow the lead of Burawoy (2003), Hall (1986), and Polanyi (2001 [1944]) in exploring the importance of markets to social and economic life. The geography of markets should have much to say about how this insight can be used to explore how markets are important to the production of spatial relations or, in the words of Collard (2014), their ‘spatial momentum.’ In an era where social life is increasingly under market rule, the ways in which markets reshape spatial relations is important to study. Collard’s (2014) exploration of how the valuation of animal life in exotic animal auctions has remade the Guatemalan landscape is one example of this. From the chapters above we can highlight several more, such as the changing patterns of student movement through the Detroit metropolitan region, the connection between schooling markets and the restructuring of Detroit, and the new geographies of schooling that are facilitated through online charter schools. Markets for schooling have not simply changed schooling, but have remade how people experience the places they live and their movement through space in important ways. The politics of such changes and what they say about how space and place are produced are a crucial area for geographers to explore if they wish to understand modern life and disrupt the neoliberal common sense of how markets operate.

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