

Stratification and Education

A temporal study of stratification within the education systems
of the social democratic welfare regime 1990 and 2013

Abstract

This paper focuses on the stratification within the education systems of the social-democratic welfare regime. Since 1990 the welfare states and education systems of Denmark, Finland, Norway Sweden has changed significantly. At the same time there has been a decrease in the power of the working class and its allies. According to the Power Resource Theory this should, at least eventually, lead to a roll-back in the welfare state. This paper attempts to observe whether this holds true for the education systems in the regime. In order to do that this study utilizes Esping-Andersen's concept of stratification to see if the countries within the regime have shifted. The conclusion is that the results are mixed and that while stratification has increased in some aspects it has actually decreased in others mostly to do with an increase in the access to pre-school.

Key Words: Welfare Regimes, Stratification, Power Resource Theory, Education, Comparative Research

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1 Introduction

The role of education in society and how education policy should be shaped has always been at the forefront of the debate both in scientific and popular circles since the days of Plato and Aristotle. Traditionally, education has been a field reserved for the elites of society and their offspring with the idea of universal education for the common man not being common until the 19th and 20th centuries. Since then, education has continued to be an important part of the debate and an important issue for voters ranking as the 3rd or 2nd most important issue in the last three elections in Sweden and in Denmark the importance of increasing funding for education has never been higher among voters (Statistiska Central Byrån 2011) (Stubager et al. 2013). At the same time the education systems in Scandinavia have, as will be shown in this thesis, gone through big changes the last 23 years.

This thesis utilizes the countries of the so-called “social-democratic” welfare regime. The concept of welfare regimes was created by the Danish researcher Gösta Esping-Andersen when he published his influential study *Three Worlds of Welfare Capitalism* in 1990 which discussed the nature of welfare states in the developed world and how they fit into different clusters or regimes. Esping-Andersen sorted the states based upon two variables, de-commodification and stratification, and discovered that, in general, they constituted three different way to construct a welfare state. These three regimes were named the liberal (characterized by low de-commodification and low stratification), the conservative (characterized by low de-commodification and high stratification) and the social-democratic regime (characterized by high de-commodification and low stratification). This study is focused on the Scandinavian countries of the social-democratic regime. The population in these countries is less reliant on the market and benefits and social provisions are generally universal compared to targeted assistance for the most needy (Scharpf and Schmidt 2000, p.332-333).

This paper is divided into seven parts. Following this introductory chapter is a chapter which contains a research review. The third chapter is the method section and deals with the methods used in the study, including a review of the comparative research method and the problems with adjusting it in a temporal study. The fourth chapter provides information about the theories this essay is built on and goes into the details of the power resource

theory as well as Esping-Andersen's theory of welfare regimes. The fifth chapter contains the results of the study and a discussion of the results and the variables used in it. The final chapter concludes the essay with a discussion of the findings of the study and suggests possible future research.

One theory that tries to explain the shape of welfare states is the Power Resource Theory. According to this theory, the shape of welfare states (and regimes by extension) is the power of the working class and their allies. If the working class and its allies are strong there is a greater chance that policies that mitigate market forces and decreased segregation and stratification will be enacted. If the working class and its allies in the social-democratic welfare regime had weakened that should also have an effect on stratification and de-commodification. Furthermore, this should also hold true for the education system of the countries included in the study. However, since complete de-commodification within the education system is pretty much a given throughout the OECD this thesis will focus on the stratification within the education systems.

The focus of this study is the countries of the social-democratic welfare regime namely Denmark, Finland, Norway and Sweden. The reason for choosing the social-democratic welfare regime and these countries is that since 1990, when Esping-Andersen published his book, education policy has shifted significantly within the social-democratic regime and the debate about how education should be provided has been high on the agenda. At the same time working-class organization and the strength of parties allied to the working class has decreased in virtually all of the countries in the study and policies that could be assumed to increase stratification have been enacted (OECD 2012). This would imply, according to the Power Resource Theory, that the education systems within the social-democratic welfare regime would become more stratified.

This paper hypothesizes that the education systems within the social-democratic welfare regime have changed since 1990 and that the general trend since then is an increase in stratification within the education systems. This should be seen in a larger prevalence of free school choice, in the increased prevalence of practices such as ability grouping, attempts to divide students at an earlier stage, increased use of standardized tests and a decrease in the availability and subsidization of pre-schools. This increase in stratification would also fit into the Power Resource Theory and further strengthen that theory.

What this study finds is that while the Power Resource Theory postulates that if the working class and its allies in the social-democratic welfare regime had decreased in power that should also have an effect on stratification and de-commodification. However, since

complete de-commodification within the education system is pretty much a given throughout the OECD we should only be able to see increases in stratification and not de-commodification. Nevertheless, what this paper finds is that the results are mixed. While some of the variables studied have shown a clear increase in stratification others show signs of the opposite or no change at all. This might be due to the timeframe used for the study or show a deeper problem when using the Power Resource Theory to understand changes within the field of education.

1.1 Research Question

My research question is as follows: Has there been a shift towards a higher degree of stratification in the education systems of the countries making up the social democratic regime? If so can this change be explained by the weakening of the working class and its allies in accordance with the Power Resource Theory?

This question will be answered by examining variables with an effect on stratification within education and if there has been a change in those variables in the countries studied. This will then be compared with the change in union density within the countries in order to determine if there has been a decline in working class strength.

1.1 Background and previous Research

The idea of education as a mean of dividing/sorting the population is not a new one. Marxist thinkers and researchers have spent especially much time on the subject with many of them viewing the education system as a tool of the capital/bourgeoisie with which to mold the labor pool according to their needs. In particular, Gramsci had a lot to say about the education system and the problems with stratified education (1970). According to Gramsci the aim should be “to create a single type of formative school (primary-secondary) which would take the child up to the threshold of his choice of job,” thus proposing a non-divided school void of sorting and with as little stratification as possible (1970, p.40).

1.1.1 Previous Research

This is not the first paper researching the topic welfare regimes and education nor will it be the last. Most of the previous research has focused on tertiary education, probably due to the fact that the concepts of stratification and especially de-commodification are much clearer and easier to research in that setting (see Yao & James 2012 and Bastedo & Jaquette 2009). In fact, de-commodification within primary and secondary education is virtually non-existent within the OECD.

One exception to this is Beblavý et al, whose study looks at whether stratification within the education system goes together with stratification within the welfare state as well as the role of the family and state in providing welfare (2011). The study finds that the states within the OECD can be organized in different clusters depending on their attempts at equalization and family/market involvement in providing education (Beblavý et al. 2011, p.27). This study is important because it shows that there is a connection between low stratification in the welfare system in general and low stratification within the education system.

2 Method

This study aims to compare the education systems of the countries belonging to Esping-Andersen's social democratic regime today to how they looked in 1990 in relation to the concept of stratification. To that effect I've decided upon five variables that have an effect on stratification with the goal of creating a cross-temporal study. The variables are: School Choice (can the parents student choose their school), Ability Grouping, Early Sorting, and Child Care (subsidized and available for all?). These variables have been chosen because they have been shown to have an effect on education stratification in previous research. The justification for these variables is also covered more in depth in the results chapter. Most of the data, especially the data for 1990, is retrieved from primary sources, chiefly the laws regulating education policy as they were at the time and in certain cases where it was felt to be necessary commentaries on the laws in question. Besides laws I also make use of secondary sources such as publications by EURES.

One negative side effect of this approach is that the laws might not actually represent the situation in practice but rather how it should be. Also, law and the purpose of law vary from country to country and whereas one country might detail everything in statute another might, for example, give courts a bigger leeway in interpreting laws. However, the laws do say a lot about how the system is intended to function ideally which is of the greatest interest to this study.

Another problem, as with most quantitative data, is the lack of reliability within the results. I cannot know for sure that the variables chosen really describe what I believe they do. The limited number of cases also creates a validity problem, however, since I have studied every country within the social-democratic welfare regime this should serve to mitigate that concern.

2.1 Comparative Research with a Temporal Twist

Comparative research is an old research method and is described by Bartolini as follows "The main purpose of comparative research has been to identify regularities in human political af-

fairs and to establish theoretical and empirically refutable propositions that could explain these regularities” (1993, p.139). To do this researchers “compare political phenomena in different situational contexts”, for example, Esping-Andersen’s comparison of different welfare states (Bartolini 1993, p.139) (Esping-Andersen 1990). The field of modern comparative research within the social sciences go back to the ideas of Weber and Durkheim (Ragin & Zaret 1983, p.731). However, Weber and Durkheim had two different approaches to comparative research and how it should be carried out. Weber believed in ideal types “to enable limited generalization about historical divergence;” these generalizations can then “point to different patterns of process” that should not be confused with natural laws (Ragin & Zaret 1983, p.731-732). In contrast, Durkheim, who also believed in the complexity of the social world, held that social policy should emulate the laboratory experiments of the natural sciences as much as possible and believed that sociology as a discipline needed to “transcend a preoccupation with detail and uniqueness” and instead look for generalizations (Ragin & Zaret 1983, p.732). Another central tenant of Durkheim’s approach was the existence of “social species” which are discrete types of societies necessary in order for comparisons and generalizations to be done (ibid). What both Weber and Durkheim had in common was that they saw comparative research as a middle road between complexity and generalization (Ragin & Zaret 1983, p.732-733).

As previously stated, this thesis is based on cross-temporal comparative research. When doing cross-temporal studies there are specific challenges to be encountered compared to doing non-temporal research. Bartolini writes that it’s important to recognize that when studying policy over several different points in time “variances in each property under analysis can be obtained through observation of the same unit ... located at different points in a temporal sequence” (1993, p.135). There are mainly three problems to take into account when doing temporal comparative research according to Bartolini (1993, p.147). The first problem has to do with the choice of temporal units, in other words how to decide on which time periods to study (ibid). This paper uses the 1st of January 1990 and the 1st of January 2013 as the two units of time for the study. 1990 is chosen due to the fact that it may be seen as the last year before the fall of the Soviet Union and rise of the new politics associated with that event. The 1st of January 2013 is chosen because it represents the present and how the education systems look today. The second problem deals with generalizations. Bartolini claims that cross-time generalizations differs to an important degree from those of cross-unit generalizations (1993, p.153). For this paper the issue is whether we can discover the sequential rules of the temporal variables (Bartolini 1993, p.154). That is if a change in unionization

density over time has an effect on the stratification variables. The third of Bartolini's problems concerns multicollinearity (1993, p.157). The problem with multicollinearity in a temporal study is that it might be difficult to "disentangle temporal presence and relative importance" (Bartolini 1993, p.157-158). This is a problem when making a study like this since one can't be sure that a change in stratification depends on a change in Power Resources and not some other parallel temporal phenomena. In other words there might be a reliability problem. However, there are also benefits with temporal studies such as that you increase the number of cases, for example when studying several variables in several countries over different time periods increasing the validity of the study (Bartolini 1993, p.145-146). In this paper that means that we double the amount of variables by looking at two time periods.

3 Theory

This thesis will make use of two theories in order to explain Scandinavian education policy and how it has changed. The two theories are the Power Resource Theory and the Welfare Regime Theory. The Power Resource theory explains how welfare states, including the education system, come to be shaped in different ways in different countries and why certain nations have a strong welfare state while others have a very limited, comparatively, welfare state. The Welfare Regimes Theory is an offshoot of the Power Resource Theory and it's used to explain how welfare states differ and to categorize the welfare states. This paper uses the Power Research Theory to explain the causal variable for the increase in stratification within the Scandinavian welfare states. The Welfare Regimes Theory is used to both highlight the concepts of stratification and de-commodification and why they are important to understand the Scandinavian welfare state. Together these two theories form the base of this thesis and for understanding the retrenchment taking place within the education sector in the social democratic welfare regimes.

3.1 Power Resource Theory

One of the most prominent theories about what shapes the structure of advanced welfare states is the power resource theory. Pontusson and Kwon describe it in the following way: "Power resource theory essentially posits that 'working-class mobilization' is a critical determinant of the public provision of social welfare or, more specifically, the extent to which public welfare systems redistribute income and labor-market risks" (Kwon & Pontusson 2006, p.1). This means that states with a more organized and better represented working class will have welfare systems that are larger in size and more redistributive (ibid). Another way to look at power resource theory is in the form of conflicts and that the "welfare state development is likely to reflect class-related distributive conflict and partisan politics" (Korpi 2006). Both of these perspectives are in agreement that it is the strength and actions of groups within society that has the most profound impact on the shape of the welfare system.

Power resource theory was created in the late 1970's and was advanced by the so-called Scandinavian school of social researchers (Olsen & Connor 1998, p.3). The theory was an attempt to assuage the perceived short-comings in the dominant theories of the day (Olsen & Connor 1998, p.3-4). The origins of what would become power resource theory can be found in the works of Gerhardt Lenski who "argued that democratic polities created the possibility for the 'many' to combine against the 'few' (the elites) and use the state to claim a larger share of the social surplus" on the condition of mass organization among workers (Myles & Quadagno 2002, p.37) In particular there were three theories that were dominant in the decades leading up to the introduction of the power resource theory: structural functionalist theories, pluralist theories and neo-Marxist theories (Olsen & Connor 1998, p.4-5). The structural functionalists, such as Durkheim, held that "political institutions arose in response to universal stresses and needs which emerged as simple societies evolved into more complex entities" (Olsen & Connor 1998 p.4). The creation of the welfare state can thus be seen "as a society's way of adapting gradually to the changes brought about by modernization, industrialization, and population growth rather than as the result of philanthropy, innovation, or political machination" (ibid). The proof of this, according to the structural functionalists, is that within the advanced economies that have experienced the highest economic growth, industrialization etc., we can see the emergence of the welfare state (Olsen & Connor 1998, p.4).

Pluralists, in contrast to structural functionalists, argued that it was actors that were the central catalysts of change in social institutions and the welfare state (Olsen & Connor 1998, p.5). Korpi claims that the essence of the pluralist argument is that "the essence of power and its consequences are revealed and can be studied primarily in situations where power is actually exercised" (Korpi 1998, p.38). Pluralists "maintained that power is widely diffused among a variety of competing interest groups and not held by ruling elites or classes", and that "no one particular group predominates at all the times over all issues" (ibid). Therefore, social changes and policies are more a result of the government's response to the lobbying of different interest groups representing different interest groups (Olsen & Connor 1998, p.5). The most famous work in this school of thought is Robert Dahl's study of the community of New Haven, Connecticut, and how political policies are shaped and created there (Dahl 1961). Dahl was pre-occupied with the concept of power, which he described as "A has the power over B to the extent that he can get B to do something that B would not otherwise do" (Korpi 1998, p. 39). Because of this, the pluralist tradition has been mainly focused on concrete decision making and on "who prevails in decision making" (ibid).

Finally, Neo-Marxist theories have had a great impact on what would become power resource theory. Neo-Marxist theories took issue with the false notion of stability and consensus that the other theories propagated, in fact if there was a consensus it was “enforced through economic and political domination” (Olsen & Connor 1998, p.5). Unlike pluralists, the neo-Marxists didn’t believe that power was diffused among different interest groups. Instead, they believed that it was concentrated to capitalists that could use it to control the state (ibid). Welfare programs are initiated because capitalists want them in order to “increase output, stabilize or revitalize the economy, and pre-empt or defuse working class militancy (Olsen & Connor 1998, p.5-6). Some of the neo-Marxists, more closely aligned with functionalist thought, considered all of this to be structurally determined and that the government automatically worked for the, some-times long term, interests of the capitalist class (Olsen & Connor 1998, p.6).

Power resource theorists disagreed with the lack of class conflict within the earlier theories and their failure to explain the variation in the growth of the welfare states (Olsen & Connor 1998, p.6). They agreed with the neo-Marxists that the capitalist class was by far the most important and powerful group in society but argued that “the balance of power between labor and capital was fluid and therefore variable” (ibid). Contrary to traditional Marxism, they also argued that the working class could “augment their power by forming coalitions with other classes, such as agrarian or white-collar workers” (Olsen & Connor 1998, p.6). The core of the resource power theorists arguments was therefore that it is politics that matter, even though structures have a role, and that without a strong working class/left wing coalition there is nothing that compels “the rich nations to commit resources to the development of a welfare state” (Olsen & Connor 1998, p. 7). Furthermore, power resource theorists argue that there is too much of an emphasis on economic development in explaining the early welfare states and that if one examines which countries were the first to introduce welfare services, Germany and Austria, they are also the countries with the most active labor movements at the time (Olsen & Connor 1998, p.7-8).

Central to the power resource theory, like the pluralists, is the concept of power. Unlike the industrialization theorists Power Resource theorists, chiefly Korpi, claimed that “‘politics matters’ in explaining welfare state diversity, ”and that the welfare states in the “democratic west” can be said to reflect the organization and political leverage of the welfare state (Myles & Quadagno 2002, p.37). However, power resource theorists’ definition of power differs from that of the pluralists. Korpi himself would define power resources as “the attributes (capacities or means) of actors (individuals or collectives) which enable them to re-

ward or to punish other actors” (Korpi 1998, p.42). Additionally, “since power is a relational concept, the attributes of actors become power resources only among two or more interdependent actors who have at least some interests in the attributes of the other actor” furthermore is not a zero-sum game and the exercise of power can be defined “in terms of the activation of power resources in the relation to other actors” (Korpi 1998, p.42). These power resources can be put into three different categories: coercive power resources, remunerative power resources and normative power resources (Korpi 1998, p.42-43). Coercive power resources refers to resources that involve physical sanctions, such as violence, remunerative resources refers to “resources involving the control over material rewards”, and normative resources refers to the “allocation or manipulation of symbolic rewards and deprivations” (Korpi 1998, p.43). According to Korpi, coercive resources “generate an alienation among persons subject to them”, remunerative resources “create a calculative orientation” and normative resources “generate positive orientations” (ibid). Furthermore, the costs, described as the need to monitor those subject to the resources, “tend to be highest for the coercive and lowest for the normative” (Korpi 1998, p.43). Therefore, power and power resources are not homogenous and come in several different shapes with varying attributes. Korpi further argues that there are three major types of power resources in the Western world: violence, property and labor power (Korpi 1998, p.44). Violence is the most abundant of the types; it’s generally reserved for the state and the drawback is the high cost, as it is with coercive resources in general (ibid).

Pontusson and Kwon describe the Power Resource Theory in the following way: “Power resource theory essentially posits that “working-class mobilization” is a critical determinant of the public provision of social welfare or, more specifically, the extent to which public welfare systems redistribute income and labor-market risks” (Kwon & Pontusson 2006, p.1). This means that states with a more organized and better represented working class will have welfare systems that are bigger in size and more redistributive (ibid). Another way to look at power resource theory is in the form of conflicts and that the “welfare state development is likely to reflect class-related distributive conflict and partisan politics” (Korvi 2006). Both of these perspectives are in agreement that it is the strength and actions of groups within society that has the most profound impact on the shape of the welfare system.

3.1.1 Critique of Power Resource Theory

Power resource theory has become one of if not the most dominant theories within the field of welfare state research but it is not without its detractors nor is there a lack of alternative theories.

One of the main critiques against power resource theory, as espoused by Korpi and Esping-Andersen, is brought forth by Swenson who argue that the difference between welfare states cannot be explained by the relative power of the labor movement/left-wing and instead that extensive welfare states, like the Swedish one, were created in cooperation with employers (Swenson 2002, p. 10). Using the example of Sweden he points towards cases in which the employers were willing to go further than the Social Democrats and that in many regards the Swedish welfare state lagged behind the American one until the late 1940's and 1950's (Swenson 2002, p.10-11). Swenson argues that even though the works of some power resources theorists show that there is a correlation between strong leftist parties/labor movements and welfare state development that "the correlation does not prove causation was at work" and that it does not take into account whether there is also an interest among capitalists to introduce reforms (Swenson 2002, p.9). Instead, the shape of the Swedish welfare system vis-à-vis the American can be explained by the common interests of the labor movement and the capitalist class (Swenson 2002, p.321-322).

Hall and Soskice espouses a argument similar to Swenson by claiming that power resource theory omits the importance of the employers and firms in its explanation of the welfare state (Hall & Soskice 2001). Hall and Soskice refers to their approach to welfare theory as "Varieties of Capitalism" and is an actor-centered theory that sees "the political economy as a terrain populated by multiple actors, each of whom seeks to advance his interests in a rational way in strategic interaction with others" (Hall & Soskice 2001, p.2-6). Their theory argues that we should "see companies as the crucial actors in a capitalist economy" and that "they are the key agents of adjustment in the face of technological change or international competition whose activities aggregate into overall levels of economic performance" (Hall & Soskice 2001 p.6). The crux of their argument is thus, as formulated by Korpi, that "where production requires asset-specific skills, employers have been key actors with first-order preferences for social programs providing insurance for investments in specific skills" (Korpi 2006, p.170). Furthermore, welfare systems are not reflections of the balance of power between labor and capital but come from the strength of the employers and should be "understood as complements to national production systems requiring asset-specific skills" (ibid).

Power Resource Theorists such as Korpi reject many of the premises of the Varieties of Capitalism Theory (Korpi 2006). Korpi writes that "companies are unlikely to have

social citizenship expansion as a first-order preference driving them to become agenda setters in welfare state expansion” (Korpi 2006, p.181). The argument is that it is difficult to observe actors’ preferences by gauging their actions but it is possible to observe when they enter the policy process, and how, in the adaption of social policies (Korpi 2006, p.181-182). Korpi identifies three ways to engage in policy which, according to him, should tell one something about the preferences of the actors are they the ones initiating the policies (protagonists), the ones getting involved in subsequent stages of the process (consenters) or do they persistently oppose the policies (antagonists) (Korpi 2006, p.282). What Varieties of Capitalism theorists get wrong, Korpi argues, is that they confuse consenters with protagonists and that if the Varieties of Capitalism theory held true then employers/firms should be the protagonists, the agenda setters (Korpi 2006, p.182-183). Korpi finds that “employer-centered research has not yet presented empirical evidence indicating that employers have been protagonists with first-order preferences for major reforms extending social citizenship” thus not being instrumental in bring about social policy (Korpi 2006, p.202). Furthermore, “political parties responsible for legislation have represented primarily relatively broad-based class interests rather than skill-specific interest groups” decreasing the likelihood that it’s the need for asset-specific skills that determines the shape of the welfare state (Korpi 2006, p.204).

A third theory that is not in direct opposition to the Power Resource Theory but should rather be seen as a compliment to it is Quality of Government Theory (Rothstein 2011). Proponents of the Quality of Government Theory takes issue with the lack of inclusion of institutions as explanatory power and that they are viewed “as simple arenas for conflict among social classes or as useful political tools for the parties involved in this struggle” (Rothstein 2011, p.2). The Quality of Government theory posits that there are two reasons for supporting welfare state policies: “that there social classes give rise to different social risks, and rational wage workers (and their representatives) reasonably opt for some kind of protection from these risks” or “a demand for redistribution based on either norms about social justice or class-based self-interest” (Rothstein 2011, p.3). What Quality of Government theorists asks themselves is what makes people trust the state to carry out the task of risk protection and redistribution and not some other entity (ibid). The answer is for the state to get a large role in providing redistribution and risk protection there needs to be “a reasonably high level of QoG, political mobilization for welfare state policies in the way that PRT has outlined is unlikely to have broad appeal” that is the people have to trust the state in order for it to take a big role in providing welfare (Rothstein 2011, p.11). The problem with Power Resource The-

ory is that it's too one-sided and disregards the importance of good governance as a necessity for the large state-funded welfare states in Scandinavia.

For this study the main limitation of Power Resource Theory is the fact that not many researchers have tried to apply it to the field of education as a part of the welfare state. Unlike other policies such as health care and unemployment insurance the effects of a change in education policy is far more long term and there are few "gains" to be had for either side in the short term. However, in the long term education is one of the most important redistributive tools that the state has and the importance of education for the working class, and with as little stratification as possible, is something that is espoused by several important socialist thinkers such as Marx and especially Gramsci.

3.2 The Three Welfare Regimes Theory

The welfare state is a comparatively novel idea and can trace its origins back to the early days of the labor movement as well as with the conservative Right in Germany (Wahl 2011, p.22-23). This was done partially in response to the growing, but still weak, power of the nascent labor movement but also due to the needs of the growing German economy (Wahl 2011, p.23). Since those early days the welfare state has both evolved and expanded with events such as the great depression and the booming post-war years (Wahl 2011, p.23-25). Today all developed countries today can arguably be described as some form of welfare states with social rights being seen as something self-evident among most people.

Research on welfare states has been, as discussed in the previous chapter, going on almost as long as the existence of welfare states themselves. It's also been common knowledge for quite some time that welfare states differ from each other and that some are more encompassing than others. In 1989/90 Gösta Esping-Andersen saw a pattern in this and concluded that the welfare regimes could roughly be clustered into three different groups or regimes (Esping-Andersen 1990). Esping Andersen called these regimes the liberal regime, the corporatist regime and the social democratic regime (Esping-Andersen 1990, p.26-27). Esping-Andersen's model/theory has since then been picked up by other researchers who have modified it by adding new and different regimes or moving some welfare states into different regimes from Esping-Andersen; however, the central core of Esping-Andersen's premise remains (Kwon 1997) (Fenger 2007). Central to Esping-Andersen's typology is the con-

cepts of stratification and de-commodification and his three regimes are based on ideal types of those concepts.

Esping-Andersen is an adherent of the Power Resource theory and holds that his regimes can be causally explained in part by the Power Resource Theory. Furthermore, Esping-Andersen believes that it is the coalitions between classes and not the strength of the working class/left wing parties which determine the shape of the welfare state with the working class allying with farmers or white collar workers at different points in time (Esping-Andersen 1998, p.146-148). The regimes can therefore also be seen as created by the conflict that defines the Power Resource Theory.

3.2.1 De-commodification

One of the two core concepts that Esping-Andersen uses to group welfare states is de-commodification. De-commodification can be explained as “the extent to which commodities are not exclusively exchanged on market principles” (Willemse & de Beer 2012, p.108). Esping-Andersen’s concept of de-commodification differs slightly to this interpretation and “refers to the degree to which individuals, or families, can uphold a socially accepted standard of living independently of market participation” (1990, p.37). This paper will make use of this definition of de-commodification unless otherwise stated.

Esping-Andersen considers there to be three “sets of dimensions” when it comes to determining the extent of de-commodification within the welfare state (1990, p.47). The first dimension is the issue of accessibility of welfare benefits. A welfare state has a higher degree of de-commodification “if access is easy, and if rights to an adequate standard of living are guaranteed regardless of previous employment record, performance, needs-test, or financial contribution” (ibid). For example, the American health care system where only certain needs-tested groups, the poor and elderly, have free access to health care can be said to have a low degree of de-commodification.

The second dimension is that of income replacements. That happens “if benefits levels fall substantially below normal earnings or the standard of living considered adequate and acceptable in the society,” thus driving “the recipient back to work as soon as possible” (Esping-Andersen 1990, p.47). This has the effect of making individuals and families, the people, more reliant on the market for achieving a reasonable living standard. For example,

Swedish benefits for the unemployed (*socialbidrag*) are calculated to provide for what the state considers to be an adequate standard of living. If the state was to decrease the amount that the unemployed are eligible for then they would have to turn to the market in order to keep the same standard of living.

The third dimension of de-commodification encompasses the range of entitlements which are provided for by the state. These range from “protection against the basic social risks: unemployment, disability, sickness and old age” to a more advanced case “where a social wage is paid to citizens regardless of cause” (Esping-Andersen 1990, p.47). For example, in a laissez-fair state with no unemployment benefits or paid sick-leave one is more dependent on the market and one’s job to keep one’s standard of living.

3.2.2 Stratification

Stratification is the second core concept within Esping-Andersen’s theory of welfare regimes. Willemse and de Beer describe stratification within the welfare state as “the (status) hierarchy produced by welfare state policies” (Willemse & De Beer 2012, p.108). Esping-Andersen’s take on stratification and the welfare state is that “the welfare state shapes class and status in different ways” and that there are several dimensions to stratification (Esping Andersen 1990, pp.57-58). These dimensions range from the clear-cut income-distributive role of the state, including what the state does to decrease income disparity, to the education system and the organization of social services (Esping-Andersen 1990, p.58). Stratification, in other words, describes what the welfare state does to increase or decrease class and status differences.

According to Esping-Andersen there are three ideal types of stratification with, each cultivating different values (Esping-Andersen 1990, p.58). These values are referred to as hierarchy and status, dualisms and universalism and correspond, roughly, with the three different welfare regimes identified by Esping-Andersen (*ibid*). The first value, hierarchy and status, is commonly associated with the corporatist or conservative regime (Esping-Andersen 1990, p.58-61). In this regime it’s held that “traditional status relations must be retained for the sake of social integration” (Esping-Andersen, 1990, p.58). These values and beliefs date back to the inception of what is considered the first welfare state, imperial Germany of the late 19th century, and are based on concepts of paternalism and authoritarianism (Esping-Andersen 1990, p.59). The welfare state in this regime aims to increase class differences rather than to decrease/eliminate them and to create status barriers (*ibid*). One legacy of these

values is the myriad of different social benefits for different social groups from pensions to unemployment benefits (Esping-Andersen 1990, p.60-61).

Dualism is the second value and can be found within states belonging to the liberal regime (Esping-Andersen 1990, p.61-65). The idea of the liberal regime is that “by withholding aid, or helping to eliminate traditional systems of social protection, and by refusing to place nothing but the market in their place” it’s possible to “grant the cash nexus a hegemonic role in the organization of social and economic life” (Esping-Andersen 1990, p.62). According to Esping-Andersen this in practice creates dualism in society through means-tested relief and the social stigma attached to claiming social benefits (ibid). In reality liberal regimes often “came to incorporate a blend of welfare capitalism in the market, and social insurance in the public sector” due to the failure of the private sector to provide welfare benefits by itself (Esping-Andersen 1990, p.63). The legacy of the liberal regime is needs-tested benefits, help to self-help and competitive individualism (ibid).

Universalism is the value of the social-democratic welfare regime (Esping-Andersen 1990, p.65-69). According to Esping-Andersen the view of the social-democratic regime was that it “was the construction of solidarity that mattered” (Esping-Andersen 1990, p.65). In order to achieve that solidarity between workers the differences between different groups of workers had to be minimized (ibid). In the modern welfare state this is characterized by “broad popular universalism” the idea that the welfare system is just not for the needy, such as in the liberal regime, or that the benefits would differ for different groups of workers, such as in the corporatist regime (Esping-Andersen 1990, p.67). This is best exemplified in benefits such as universal subsidized day care and tuition-free universities.

3.2.3 Critique of Welfare Regimes Theory

Since Esping-Andersen published his theory of welfare regimes in 1990 it has been criticized by several researchers from different vantage points and angles. These critiques range from arguing that there should be more than three regimes, to the lack of a gender perspective, to researchers who argue that there are no welfare regimes at all.

Bronchorst’s critique of Esping-Anderson is based on feminist grounds. Bronchorst argues that Esping-Andersen “largely ignores gender” and that the theory of welfare regimes lacks a gender dimension (Bronchorst 1994, p.27). Bronchorst claims that when Esping-Andersen “notes differences in women’s positions within the regimes, he mainly de-

scribes them; he does not explain them.” She also claims that Esping-Andersen is too pre-occupied with the relationship between the state and the market and largely neglects the institution of family (Bronchorst 1994, p.27-28). Bronchorst further argues that welfare policies affect men and women differently and that if one only examines women then the regimes would look quite different, especially when it comes to de-commodification (Bronchorst 1994, p.28). In fact, if Esping-Andersen had been analyzing only women then “the liberal and especially conservative regimes have contributed to the de-commodification, in the sense that they have actively supported a housewife-breadwinner family model” in contrast to the social democratic regimes that have commodified them (ibid). Another gender related critique of Esping-Andersen’s research comes from Lewis, who states that “it misses one of the central issues in the structuring of welfare regimes: the problem of valuing the unpaid work that is done primarily by women in providing welfare, mainly within the family, and in securing those providers social entitlements” (Lewis 1992, p.160). However, Jenson argues that Lewis is off base with her critique and take issue with her attempt to equate unpaid work with care (Jenson 1997, p.183). Jenson claims that “parental leave and other care allowances show, caring work within the family can be paid work” and that her failure to acknowledge that “renders invisible certain gendering practices” (ibid). This clashes with Lewis’s claim that care work in the family is not compensated and also her notion that the Scandinavian welfare state commodifies women.

As referenced earlier, there are also those who disagree with the whole concept of welfare regime rather than how to define the regimes. These arguments have different empirical bases but all agree that the concept of welfare regimes is flawed and that it is not possible to neatly group advanced welfare states into groups of similar “regimes”. One of these critics is Kasza who argues that the Welfare Regime Theory “cannot survive a demonstration that individual states in fact embrace contradictory policies” and that in order for a welfare state to belong to a coherent regime then “most of the key policies will indeed reflect a similar approach to issues of public welfare” (Kasza 2002, p.271-272). Also, according to Kasza the welfare regimes “embodies a distinctive rationale for public welfare” these rationales range from the idea of universalism in the social democratic regime, to the work-ethic of the liberal regime, to the preservation of status within the conservative regime (Esping-Andersen 1990, p.26-27) (Kasza 2002, p.272). In other words what can be expected from a welfare state belonging to a certain regime, according to Kasza, is that they confirm to a set of principles common to the regime yet this is not the case.

In fact, Kasza claims that welfare states consists of a “contradictory and disjointed set of policies that are far from constituting a coherent whole of any sort” (Kasza 2002, p.272-273). Welfare policies are generally not adopted as part of some bigger plan but are, as a rule, adopted piecemeal at different times in a country’s history (Kasza 2002, p.273). For example, pension systems were adopted over a long period of time and in a country such as Sweden parts of the pension system can be dated back to 1913 before the emergence of the modern welfare state (ibid). Welfare state and systems are thus put together over long time periods with different governments and goals in mind. In a similar vein, different parts of the welfare state were created at different times with reforms rarely changing the whole state instantly (Kasza 2002, p.274). In truth, the average time between the major change in the two of the three major aspects of the welfare state (unemployment, health and pensions) is 15 years and on average it took over 23 years for most states to create the welfare state they have today (Kasza 2002 p.274-275). Furthermore, welfare policies are generally not, with the exception of very small countries, under one ministry but spread out over several ministries such as the labor ministry, the health ministry etc (Kasza 2002 p.277-278). This would further suggest, according to Kasza, that there is no such thing as a unified welfare regime.

I would agree with Kasza that there is no such thing as a real ideal welfare regime just as there are no real ideal way to describe almost all social constructs. As with the Power Resource Theory there is also the problem that the theory isn’t developed with the field of education in mind. Finally, there is also a problem that there is more or less full de-commodification when it comes to elementary and secondary schooling since it’s free in all advanced welfare states. However, this is not a problem since this thesis is concerned with the effects on stratification which certainly exists in the education systems of the advanced industrial economies.

4 Results

4.1 Variables

In order to measure stratification within the education system it is important to determine which policies can be said to increase or decrease stratification. In order to do that I use Esping-Andersen's definition of stratification within the welfare state, that is if the policy increases or decreases class or status differences (Esping-Andersen 1990, p.58). Thus those policies that have a proven effect on class or status differences are of interest to this thesis. Specifically I've decided on five variables that have been proven in peer-reviewed studies (described in detail below) to have an effect on stratification and they are the ones the analytical section of this thesis will focus on. These variables are the following: Ability grouping (if students are grouped by ability or age), School choice (if the parents of the student are free to choose which elementary school to attend), standardized testing (if and when is it implemented), sorting (when are students sorted according to their ability), pre-school (is it subsidized and are kids guaranteed a spot). The goal is that these variables will show if there has been a real change in education policy within the social democratic regime the last 23 years.

4.1.1 Ability Grouping

The effects of ability grouping are something that has been studied since the early 1900's but it wasn't until the 1970's that the effects of ability grouping came to the forefront (Rowan & Miracle 1983, p.134). Research done in the 1970's showed "that initial inequalities in achievement were actually increased over time by ability group systems," thus increasing the gap between the "high performers" and the "low performers" (ibid). This gap has been explained by the teachers acting different to the students of the high performance group vis-à-vis the low performs or that there is a difference in pacing between the groups (Rowan & Miracle 1983, p.134-135). A study by Rowan & Miracle shows that "friends influence student behavior in schools" and high performers have a positive effect on low performers which "demonstrates the importance of instructional grouping to student achievement" (Rowan & Miracle 1983, p.142).

4.1.2 School Choice

The question of school choice, the right of the parent/student to choose which school to attend, is something that has been debated heavily both in Scandinavia and in the United States (Söderström & Uutisalo 2004, p.3). The proponents argue that “the competitive forces unleashed by school choice increase efficiency” while the opponents claim that “choice merely increases segregation” (ibid). Söderström & Uutisalo did a study about the introduction of school choice in Stockholm, Sweden 2000 and the effects on segregation (Söderström & Uutisalo 2004). They found that “segregation increased along all other observable dimensions, particularly along the ethnic and socio-economic lines” showing that the free school choice had led to an increase in stratification within the education system of Stockholm (Söderström & Uutisalo 2004, p.24).

4.1.3 Early Sorting

Early sorting is similar to ability grouping in that they are both concerned with division of students into different groups. Proponents of early sorting often argues that it’s better for students to be with students of the same ability while opponents claim that the object of early sorting is to keep class and status differences intact. In contrast to ability grouping, this takes place in the class room, early sorting deals with the division of students into separate schools and programs of study.

Early sorting has been known for a long time to have a positive effect on stratification and for every transition there is in an education system students from lower class and/or status backgrounds are more likely to be “left behind” (Neugebaur & Schindler 2012, p.20-21). In conservative welfare regimes, such as Germany, where status and class differences are relatively more important there are also more transitions to make and students have to make them earlier (Neugebaur & Schindler 2012, p.22). Neugebaur and Schindler studied the effects of these transitions in the German education system and could show that for every transition the percentage of working class students dropping out is significantly higher compared to that of students from other background even when the GPA is similar (2012, p.26-

27). Other studies in countries of different welfare regimes, such as the liberal regime and Canada, also show the effects that sorting have on stratification (Friesen & Krauth 2007).

4.1.4 Standardized testing

Standardized testing is a policy that has become more widespread within the field of education over the last decades. The idea behind it is that academic standards can be raised by holding educators and students accountable by the means of an “objective” standardized test in order to check that they attain the goals set out by the government (Kearns 2011, p.113). Opponents of standardized testing on the other hand claim that standardized testing only encourages “teaching to the test” and that it disadvantages students from lower social backgrounds.

If standardized testing does disadvantage students with a lower class or status background it would have an impact on stratification. According to studies done on Canadian schools standardized testing does indeed “reproduce existing inequalities” and that “children from families of lower socio-economic status (SES) don’t do as well in school as those from wealthier families” (Kearns 2011, p.114). (Roos et al., 2006, p. 1). Not only that but standardized testing shapes the image that these students have of themselves and discourages them from education (Kearns 2011, p.126).

4.1.5 Pre-School

Policies and variables that effect stratification in the education system is not only limited to the education system itself, one of these variables is the availability and affordability of pre-school education for children. This makes sense since pre-school shapes the whole day of the child and what he/she does or doesn’t pick up there is bound to have an effect on them. According to a study by Chausa and Chapuis pre-school is a very strong factor when it comes to education stratification and that “countries that emphasize child care and pre-school institutions exhibit lower levels of inequality of opportunity” this suggests that early interventions, such as pre-schools, are critical to reduce differences in education outcomes (2010, p.2). In fact high levels of pre-school enrollment in a country seem to de-

crease the effect of the school environment on student results (Chausa & Chapuis 2010, p.32).

4.2 Analysis of the Data

The four countries examined in this study all differ from each other in several ways even though they are all part of the same welfare regime. Their welfare state and education system have different histories, they are of different sizes (most notably Sweden), and their economies differ. Because of this it is not possible to simply group all the results together but one must examine each country against its own past in order to determine if there has been a change in stratification within the education system. In this chapter I'll be going through each country and how they have changed, in accordance with the variables presented in the previous chapter, since 1990. The red color in the figures below represent policies that creates a lower degree of stratification while green represent policies that create more stratification, yellow is intermediate. These values are all relative compared to the countries in the study

Fig.1 The importance of School Choice

School Choice	1990	2013
Denmark	Not Possible (1)	Possible (4)
Finland	Not Possible (2)	Possible in Some Cases (5)
Norway	Not Possible (3)	Possible (6)
Sweden	Not Possible	Possible (7)

(1. Lov om folkeskolen 1975) (2. Grundskolelagen 1989) (3. Grunnskoleloven 1990 §13). (4. Retsinformation.dk) (5. Grundskolelagen 2012) (6. Education Act Norway 2010) (7. EURES 2013:4)

The right to decide which school your child is easily the variable that has changed the most over the past 23 years. In 1990 new students in elementary school were as a rule relegated to the public school within their district in all of the studied countries (although that could be changed in special circumstances in Finland). However, in 2013 most of the country's now let the parents decide where their children should go to school. The exception is Finland where the schools can deny a student admittance and Norway where one has the

right to go to the school of one's choosing as long as there is available space. This represents a big shift in how student make ups are determined as well as increased stratification.

Fig 2. Ability Grouping

Ability Grouping	1990	2013
Denmark	Grouping By Age (1)	Individual teaching (3)
Finland	Grouping By Age (2)	Grouping by age (4)
Norway	Grouping By Age (2)	Flexible grouping (5)
Sweden	Grouping By Age	Grouping by age

(1. Lov om Folkeskolen) (2. Förskola och primärskola i Europeiska Unionen 1994, p.43) (3. EURES 2013:1) (4. EURES 2013:2) (5. EURES 2013:3) (6. EURES 2013:4)

The next variable is that of ability grouping and whether it is allowed or practiced within the education system. As seen in figure 2, students were grouped exclusively according to age in 1990. This is still true for Finland and Sweden in 2013 but it has changed slightly in Denmark and Norway. In Denmark they practice individual teaching within age grouped classes but do not create classes based on ability. In Norway it is up to the individual school/headmaster if ability grouping takes place or not. This represent a slight change in favor of higher stratification in Norway but in most of countries studied nothing or little has changed since 1990.

Fig 3. Early Sorting

Early Sorting	1990	2013
Denmark	Upper Secondary School (1)	Upper Secondary School (3)
Finland	Upper Secondary School (2)	Upper Secondary School (4)
Norway	No Data	Upper Secondary School (5)
Sweden	Upper Secondary School	Upper Secondary School (6)

(1. Lov om Folkeskolen 1975) (2. Grundskolelagen 1989) (3. Retsinformation.dk) (4. EURES 2013:5) (5. EURES 2013:6) (6. EURES 2013:7)

Traditionally, students in Scandinavia and the social-democratic welfare regime are sorted late especially compared to those in the conservative regime such as Germany or

Austria. In 1990 all of the countries in the study started sorting students when they entered upper secondary school (Except for Norway where there is a lack of data). This still holds true in 2013 and all of the countries, including Norway, sort their students at the end of compulsory education/start of upper secondary school. What differs is whether students who chose vocational programs at the end of lower secondary schools are eligible for higher education. In Denmark they are not, while in Finland and Norway students can do extra work in order to receive eligibility and in Sweden you are eligible if you have completed a vocational high school program.

Fig.4 Standardized Testing

Standardized testing	1990	2013
Denmark	End of Lower Secondary School (1)	End of Lower Secondary School
Finland	End of Upper Secondary School (2)	End of Upper Secondary School
Norway	End of Primary (3)	End of Lower Secondary School
Sweden	No Standardized Testing	No Standardized Testing

(1. Lov om Folkeskolen) (2. Grundskolelagen 1989) (3. Förskola och primärskola I Europeiska Unionen 1994, p.41)

The age of when students have to pass standardized testing has generally remained the same across the regime since 1990. In Denmark and Norway, standardized testing now takes place at the end of compulsory education (end of lower secondary), while it in Finland takes place at the end of upper secondary school. In Sweden there is no such thing as standardized testing though there are non-binding national tests. Norway is the only country where the practice of standardized testing has changed during the period of study by moving the tests from the end of primary to the end of lower secondary school. Because of the change in Norway stratification has actually decreased within the variable of standardized testing.

Fig.5 Availability of Pre-School

Pre-School	1990	2013
Denmark	Subsidized No Place Guarantee (1)	Subsidized and Guaranteed Place
Finland	Subsidized and Guaranteed Place (2)	Subsidized and Guaranteed Place
Norway	Subsidized No Place Guarantee (2)	Subsidized and Guaranteed Place
Sweden	Subsidized and Guaranteed Place	Subsidized and Guaranteed Place

(1. Bistandsloven 1990, §73) (2. Förskola och Primärskola i Europeiska Unionen, p.1994, p.19-21) (3.

As shown in figure five, pre-school is one of the instances where stratification has decreased the most since 1990. In 1990 the social-democratic welfare regime was basically divided in two when it came to the situation of pre-school education. In Denmark and Norway pre-school was subsidized but there weren't enough places for everyone and one did not have the right to a pre-school place for one's child. In Finland and Sweden pre-school was both subsidized and one was guaranteed a place in pre-school for your child. Since 1990 you are now also have the right to a pre-school place in both Denmark and Norway. This represents a shift towards lower stratification within the regime.

Finally, since 1990 there has been a significant drop in the rate of trade union density according to the OECD (OECD 2012) From 75,3% to 68,5% in Denmark, from 72,5% to 69% in Finland, from 58,5% to 54,7% in Norway and from 80% to 67,5% in Sweden (OECD 2012) Thus, union density in all of the countries has dropped in the time period relevant to the study. According to the Power Resource Theory there should therefore have been an increase in stratification within the education systems as well as the rest of the welfare state.

5 Conclusion

The result of the study and the different variables show a mixed picture in whether the loss of power for the working class and its allies have led to an increase in stratification within the education sector. While the ability of parents to choose which school their children attends from an early age has increased across the board (with Finland as a notable exception), there has also been an expansion in the availability of pre-school for the different populations. Other variables are likewise mixed. In Norway, standardized testing is not as prevalent today compared to 1990 while it hasn't changed at all in the other countries. Ability grouping is now more accepted in Denmark and Norway but in Sweden and Finland there has been no shift at all. Finally, there has been no shift at all in when students are first sorted in any of the countries studied. This shows that while stratification has increased in some areas the education systems of the regimes are not on a straightforward path to a more divided and stratified future.

One of the areas where there is a clear decrease in stratification is the pre-school variable. In all of the studied countries pre-school is now seen as a right and is heavily subsidized. One reason for that, even though it's not within the scope of the study, is that unlike the other variables expanding the access to pre-school also expands the pool of available labor. Expanding access to pre-school could therefore be beneficial to employers and might explain why it has expanded while the power of the working class has weakened.

The school choice variable is, as previously mentioned, the variable which has seen the greatest expansion in stratification. In general it is not parents from lower socio-economic backgrounds that choose better schools, as the proponents claim, but parents from higher socio-economic backgrounds that reject schools. This creates an increased division within the education systems when schools become more and more divided based upon social class. Notably this also divides and stratifies students before they have even started school, with the students from working/lower class background and upper class students being sorted into good/poor schools from the beginning.

For future studies a more detailed look into the expansion and effects of school choice within not only the social-democratic but also the conservative and liberal regime would be warranted. The variables utilized in this study would also be valuable for similar studies within the Conservative or Liberal regime as well as for non-temporal studies between

the regimes. There is also the question of which variables accurately represent stratification and more work in this area is definitely needed.

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7 Appendix

7.1 Table with variable results

<u>Denmark</u>	1990	2013
School choice	No	Yes
Ability grouping	By Age	Individual teaching but not groups
Grades	From 8th Grade	From 8th Grade
Standardized testing	Exams at the end of compulsory education	Exams at the end of compulsory education
Early sorting	Sorting in upper secondary	Sorting in upper secondary Vocational may not be eligible for higher education
Pre-school	The parents pay 35% of the cost	Subsidized Right to a place for kid in day care

<u>Finland</u>	1990	2013
School choice	Only in special circumstances	Yes but it is at the discretion of the school applied to
Ability grouping	Grouped according to age	Grouped according to age
Grades	From grade one	Varies possible from first grade
Standardized testing	Final examination upper secondary	None in the compulsory final examination in upper secondary
Early sorting	Unitary primary school (grade 7-10)	Sorting between vocational, general in upper secondary Vocational students may do extra work in order to get into higher education
Pre-school	Fees Right to place in day care	Subsidized Voluntary/right to a place in day care

Norway

	<i>1990</i>	<i>2013</i>
School choice	No	If there are available places
Ability grouping	Grouped according to age	Flexible
Grades	From year 7	From 8th grade
Standardized testing	Test at end of primary/lower secondary	Compulsory at end of grade 10
Early sorting		Sorting between vocational, general in upper secondary Vocational students can take a supplementary program for Uni admission
Pre-school	Subsidized Not guaranteed a place	Subsidized Voluntary/right to a place in day care

Sweden

	<i>1990</i>	<i>2013</i>
School choice	No	Yes
Ability grouping	No	No
Grades	From year 8	From year 6
Standardized testing	No standardized testing	No standardized testing
Early sorting	Sorting at the end of compulsory	Sorting at the end of compulsory
Pre-school	Subsidized Guaranteed a place	Subsidized Guaranteed a place