

Moving Towards Different Educational Models of the Welfare State: Comparing the Education Systems of the Baltic Countries

RIMANTAS ŽELVYS

Faculty of Philosophy, Vilnius University, Universiteto St. 9/1, LT-01513 Vilnius

E-mail rimantas.zelvys@fsf.vu.lt

AUDRONĖ JAKAITIENĖ, DOVILĖ STUMBRIENĖ

Institute of Mathematics and Informatics, Vilnius University, Akademijos St. 4, LT-08663 Vilnius

E-mail audrone.jakaitiene@mii.vu.lt; dovile.stumbriene@mii.vu.lt

The education systems can be analysed by using the distinction along different types of welfare regimes. Esping-Andersen (1990) described the Scandinavian universalistic, Continental corporatist, and Anglo-Saxon liberal models. The purpose of the paper is a comparative analysis of the development of educational systems in the Baltic states. We used the PISA 2012 survey data and compared the Baltic countries with three “old” EU member states: UK representing the Anglo-Saxon liberal model, Germany for the Continental corporatist model and Finland as an example of the Scandinavian model. PISA 2003, 2006 and 2009 data were used for a retrospective analysis of countries’ performance. We considered four aspects of the organization of the national school systems: human and material resources in schools, leadership and the level of school autonomy, assessment, school selectivity and ability grouping. We found that three Baltic states do not represent a single Central and Eastern European model.

Keywords: education systems, welfare regimes, PISA, Baltic countries

INTRODUCTION

One of the ways of examining education systems is to analyse them by using the distinction along different types of educational models of the welfare states. How can the relationship between the welfare states and the education systems be explained? Lavrijsen, Nicaise and Poesen-Vandeputte (2014) assume the most convincing explanation to be that both express a certain ideological basis, which justifies the way they are organized. Hega and Hokenmaier (2002) suggest that the well-known Esping-Andersen’s welfare state typology can be applied to the field of education policy. In his influential work “The Three Worlds of Welfare Capitalism”

Esping-Andersen (1990) depicted the Scandinavian universalistic, Continental corporatist, and Anglo-Saxon liberal models, and the typology served as a theoretical framework for the current study. Other authors, e.g. Arts and Gellisen (2002), Fenger (2007), Aiginger and Leoni (2009), supplemented the typology with the Southern European or Mediterranean type. What models of welfare states are developing in the former socialist states? Cerami and Stubbs (2011) assume that the post-socialist countries do not fit into the three-type model, and there is a rationale to consider the post-socialist region as a separate case. Aidukaite (2004) maintains a similar view, stating that a critical analysis of the main social security institutions has supplied evidence in favour of identifying the post-socialist regime type that is already gaining acceptance within a comparative welfare state research.

Other authors think that considering these countries as one separate group would be an oversimplification. Fenger notes that “the concept of Central and Eastern European countries wrongfully suggests a basic similarity in institutional characteristics and paths of development in these countries” (Fenger 2007: 13). Simonyi states that “after the first decade of CEE transformation the studies showed that the once rather similar universalistic (on a low level) and centralized social protection systems are diverging... Some of them resemble more to Continental/Conservative welfare regimes, others show more common features with Liberal/Anglo-Saxon models, others again with Southern/Mediterranean systems or with Social-democratic/Northern models” (Simonyi 2015: 23).

Different data on educational systems are used for the purposes of comparison. For example, Aidukaitė (2010) used the UNDP and Eurostat data while assessing social justice in education in different welfare systems. Esping-Andersen (2004) used the IALS (International Adult Literacy Study) to investigate the impact of parental education on social stratification in different welfare state models. Allmendinger and Leibfried (2003) examined how the pattern of PISA 2000 results reflects the welfare state typology. Peter, Edgerton and Roberts (2010) used PISA 2003 results and discovered that the effect of socio-economic variables on individual performance was the highest in conservative countries and the lowest in social-democratic countries. Beblavy, Thum, and Veselkova (2011) found that, according to the PISA 2009 results, parental education is the most important determinant of student performance.

The purpose of the paper is to trace the directions of development of the educational systems in the Baltic states. The novelty of this study is that we analyse the relationship between changing educational systems in the Baltics with the well-established European educational models by using the PISA data. For the purpose of comparison we selected three “old” EU member states, namely, United Kingdom (UK) as representing the Anglo-Saxon liberal model, Germany as representing the Continental corporatist model and Finland as an example of the Scandinavian model. Germany was chosen as one of the countries which most closely fit the characteristics of the corporatist model (Aidukaitė 2010; Žalimienė et al. 2011). Finland attracts global attention today due to its high-performing education system (Sahlberg 2011) and is a much more popular object for analysis than other Scandinavian countries. We considered five important aspects of the organization of the national school systems, namely, human and material resources in schools, leadership, the level of school autonomy, assessment, school selectivity and ability grouping.

DATA AND METHODOLOGY

For the assessment of the similarity of education systems, we mainly used the PISA 2012 data about the organization of school systems. PISA 2003, 2006 and 2009 data

complimented our study for a retrospective analysis of countries' performance. We used data from the OECD database for the PISA data and EUROSTAT for the explanatory data. In the countries' comparative analysis we used the mean and dispersion as measures of central and spread characteristics, respectively for the PISA 2012 data. For the comparison of countries' performance over time, we presented the dynamics of average index values in figures, unless otherwise stated.

HUMAN AND MATERIAL RESOURCES AT SCHOOL

We start our analysis from human and material resources looking how distinct situation is in the Baltic countries and UK, Germany, Finland. For the analysis, we selected the student/teacher ratio (STRATIO), the shortage of teachers (TCSHORT) and the quality of school educational resources (SCMATEDU) as human performance indicators. We assess the situation of material resources by analysing the index of the quality of physicals' infrastructure (SCMATBUI).

Analysing the performance for all available PISA surveys, we see that the highest levels of STRATIO are in Germany and UK (Fig. 1). The ratio level was about 15 students per teacher in 2009–2012. Other countries cluster at about 10–11 students per teacher. The observed student/teacher ratio tendency corresponds to the size of population, namely, large countries, such as Germany and UK, experience a larger student/teacher ratio, however, Finland and the Baltic states have a smaller ratio level.

Interestingly, the curves of the ratio are declining over time in all countries, except Finland. In Estonia, these changes are especially evident. Analysing a rapidly diminishing number of students in the countries (Table 1), we see that the performance of STRATIO mimics the three-year growth dynamics.

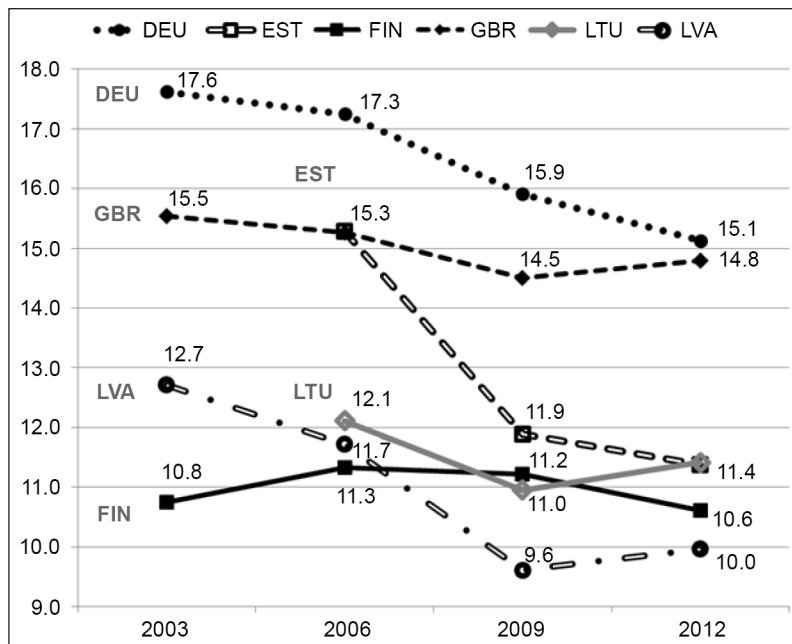


Fig. 1. Teacher/student ratio (STRATIO) for PISA 2003, 2006, 2009, 2012

Table 1. Dynamics of pupils and students (ISCED levels 1–3) for a respective year of the PISA survey

Countries	2003	2006	2009	2012	2006	2009	2012	Average growth, %
	Pupils' number, thousands				3-year growth, %			
DEU	11750.3	11537	10914.1	10351.3	-1.8	-5.4	-5.2	-4.1
EST	223.3	199.9	173.1	159.4	-10.5	-13.4	-7.9	-10.6
FIN	889.5	917.3	916.5	896.4	3.1	-0.1	-2.2	0.3
GBR	13755.1	10399.6	10331.4	10597.9	-24.4	-0.7	2.6	-7.5
LTU	631.4	574.2	499.7	425.3	-9.1	-13.0	-14.9	-12.3
LVA	379.5	337.2	285.8	250.3	-11.1	-15.2	-12.4	-12.9

Source: Eurostat, author calculations.

Analysing human resources further, we use the index of teacher shortage, TCSHORT, which measures the perception of possible problems related to difficulties of hiring teachers. Germany has the highest and hardly diminishing level of teacher shortages (Fig. 2). Estonia ranks in the middle, followed by the UK. Latvia, Finland and Lithuania have the lowest level of this index. Analysing the performance of TCSHORT over time, we see a similar declining tendency for the Baltic countries and UK. In all surveys the Finland results indicate that the country does not face the problem of teacher shortage. Latvia and Lithuania also seem to demonstrate a low demand for teachers, while Germany in this respect seems to be among the leaders in all PISA surveys. One possible reason for a weak demand in all the three Baltic countries is a double digit decline in growth rates of the number of students.

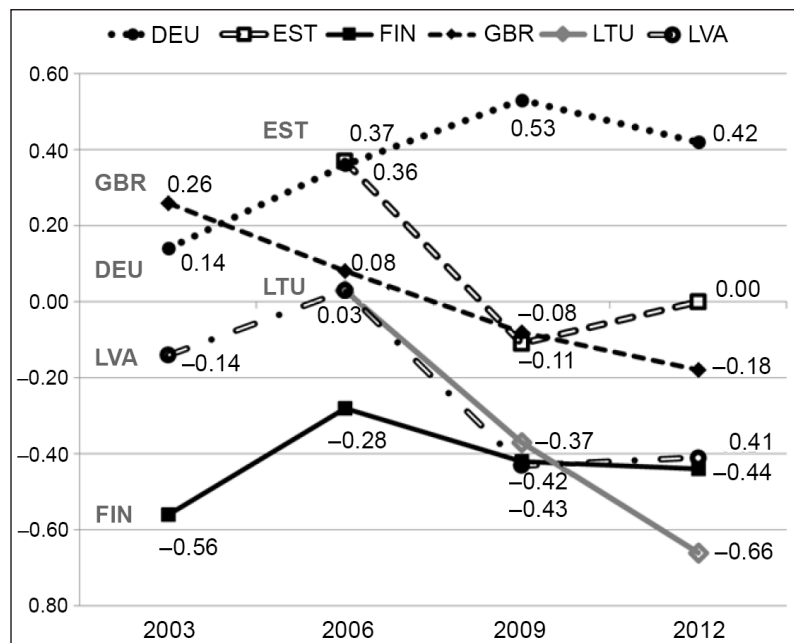


Fig. 2. The index of teacher shortage (TCSHORT) for PISA 2003, 2006, 2009, 2012

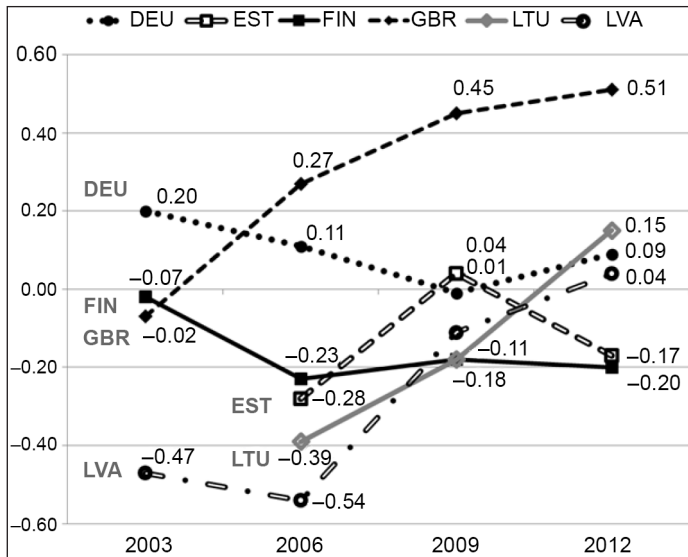


Fig. 3. The index of the quality of school educational resources (SCMATEDU) for PISA 2003, 2006, 2009, 2012

We also investigated the index of the quality of school educational resources, SCMATEDU¹. The index level is the highest with a very clear upward trend for the UK (Fig. 3). Interestingly, SCMATEDU, similarly to UK, has an upward trend for Lithuania and Latvia over time. The index level remains almost constant for Finland and Germany being below and above zero, respectively. Finland and Estonia have the smallest average value of the index in 2009.

The outcome for the UK may be explained as the consequence of liberalization of the school system which granted more autonomy to schools, which resulted in the differentiation of supplying schools with educational resources, and we can judge about it by a high level of dispersion (Table 2). For Latvia and Lithuania, it is unbelievable that educational resources deteriorated so much since 2006. Our suggestion is that perhaps the expectations of school principals concerning the supply of resources with the growth of the national GDP increased.

Latvia demonstrates the largest average on the physical infrastructure index SCMATBUI (Table 2) indicating the highest dissatisfaction level with the quality of physical infrastructure in the country. Finland has the lowest average as Estonia, UK, Lithuania and Germany are middle-ranking. Finland allocates a relatively high percentage of GDP for educational needs so it is quite convenient that the physical infrastructure seems to be in a good shape. Although we see some heterogeneity in the SCMATBUI index, we think that the index reflects a subjective evaluation of respondents as physical conditions of schools in all three Baltic states are more or less the same.

Summarizing the domain of human and material resources, we may conclude that the Baltic countries show the results which in many cases are rather close to those of Finland. All three of them have a similar student/teacher ratio, Latvia and Lithuania, like Finland, do not experience a shortage of teachers and demonstrate a similar average on the quality

¹ Similar items were used in PISA 2000 and 2003 but the question format and item wording were modified for PISA 2006 and PISA 2009. For 2012 the items were modified from 2009. All items were reversed for scaling (OECD, 2014).

Table 2. The index of the quality of school educational resources (SCMATEDU) and the index of the quality of physical infrastructure (SCMATBUI), PISA 2012

Countries	SCMATEDU		SCMATBUI	
	Mean	Dispersion	Mean	Dispersion
DEU	0.09	0.78	-0.03	0.89
EST	-0.17	0.55	0.10	0.98
FIN	-0.20	0.67	-0.32	0.98
GBR	0.51	1.12	0.04	1.14
LTU	0.15	0.48	-0.01	0.82
LVA	0.04	0.54	0.38	0.59

of educational resources, while Estonia in this respect is closer to Finland. With respect to the quality of physical resources, the Baltic states look more similar to the UK and Germany than to Finland. We tend to relate it to a relatively high level of funding for educational needs in Finland, which exceeds 7% GDP, compared with the rest of the countries, where it is around 5% (Eurostat 2012). In general, if we consider the indicators listed above as a set of input indicators, the educational systems in all three Baltic states are relatively well supplied with human and material resources and has more common traits with the social-democratic Scandinavian rather to the liberal Anglo-Saxon model.

LEADERSHIP AND SCHOOL AUTONOMY

We studied leadership similarities in the countries by analyzing four indices for PISA 2012²: the index of school management – framing and communicating school goals and curricular development (LEADCOM); instructional leadership (LEADINST); promoting instructional improvements and professional development (LEADPD); teacher participation (LEADTCH). School autonomy analysis covers our findings as regards the additional two indices: the index of school autonomy (SCHAUTON) and teacher participation/autonomy (TCHPARTI).

UK has the largest average of LEADCOM (Table 3). Latvia ranks in the middle, followed by Estonia, Germany and Lithuania. The LEADCOM average is the smallest for Finland. It seems that high UK rankings are predetermined by a neo-liberal policy of decentralization and empowerment of schools, while in Finland common national policy concerning educational goals and the social-democratic principle of solidarity prevails. The three Baltic states are in-between together with Germany, apparently, showing that they are seeking for a balance between liberal individualism and social-democratic solidarity.

In the area of the instructional leadership index LEADINST (Table 3) the tendency remains similar to that of LEADCOM. UK has the largest average, and the average in Finland is the smallest. Latvia's average on the index LEADINST is closer to that of UK. Germany and Lithuania are in the middle while the Estonia's index among the three Baltic states is closest to that of Finland. Here again the results indicate that the individualistic Anglo-Saxon approach towards teaching and instruction contrasts with Scandinavian principles of solidarity and

² Leadership block was introduced in 2012, therefore comparison with previous PISA surveys is not available.

Table 3. The index of school management: framing and communicating school goals and curricular development (LEADCOM), instructional leadership (LEADINST), promoting instructional improvements and professional development (LEADPD), teacher participation (LEADTCH), PISA 2012

Countries	LEADCOM		LEADINST		LEADPD		LEADTCH	
	Mean	Dispersion	Mean	Dispersion	Mean	Dispersion	Mean	Dispersion
DEU	-0.15	0.71	0.20	0.70	-0.11	0.62	0.03	0.52
EST	-0.03	0.85	-0.11	0.64	-0.36	0.59	-0.08	0.62
FIN	-0.38	0.87	-0.24	0.74	-0.14	0.64	0.03	0.73
GBR	0.89	0.90	0.65	0.68	0.23	0.92	0.39	0.86
LTU	-0.18	0.45	0.04	0.63	-0.30	0.75	-0.18	0.76
LVA	0.28	0.88	0.53	0.77	-0.01	0.86	0.11	0.73

seeking for common educational goals. The Baltic states demonstrate no clear direction and are closer to the corporatist-conservative German model.

The average of promoting the professional development index LEADPD is well above for UK compared to other countries (Table 3). Latvia is in the middle followed by Germany and Finland. Lithuania and Estonia have the smallest average. Seemingly, school principals in UK are more encouraged to accept responsibility for professional development of their subordinates, while other countries, especially Lithuania and Estonia, maintains the tradition that it should be first and foremost the responsibility of teachers themselves.

With respect to teacher participation in the leadership index LEADTCH (Table 3), UK again seems to take the lead, while Lithuania and Estonia show the smallest average of the index. Latvia, Finland and Germany are in the middle position. The results indicate that Lithuanian and Estonian school principals do not encourage teacher's participation in school management. Judging from the averages of the self-governance index SCHAUTON (Table 4), schools in UK and Lithuania experience the highest level of self-governance. Estonia and Latvia are middle-ranking, while Finland and Germany are lagging behind indicating that schools in these countries exercise less decision-taking powers. Contrastingly, the dispersion value for Germany is the smallest indicating that deficiency of decision-taking power is homogeneous over the country.

Teachers in Lithuania, UK and Latvia seem to have a higher level of decision-making freedom in their everyday activities as the index TCHPARTI average exceeds 0.5 (Table 4),

Table 4. The index of school autonomy (SCHAUTON) and teacher participation/autonomy (TCHPARTI), PISA 2012

Countries	SCHAUTON		TCHPARTI	
	Mean	Dispersion	Mean	Dispersion
DEU	-0.40	0.16	0.23	0.91
EST	0.40	0.58	0.15	0.96
FIN	-0.17	0.56	0.13	0.85
GBR	1.13	0.42	0.57	0.58
LTU	1.03	0.47	0.61	1.00
LVA	0.56	0.80	0.56	0.95

the Estonian and Finnish average of index TCHPARTI is below 0.2, and the index average for Germany is equal to 0.23. Diversely UK dispersion is very small, which means that in the vast majority of UK school teachers have the same level of decision-making freedom while teachers' freedom of decision-making is school dependent in Lithuania and Latvia. Analysing TCHPARTI together with LEADTCH, we find that Germany, Finland and Estonia cluster in one group: teachers in these countries are not willing to participate in leadership and are not participating in decision-making (Fig. 4). Seemingly, these results are to a certain extent determined by the level of decentralization of the school system in the country.

In summary, leadership in all three Baltic states is closer to the Continental model in framing and communicating school goals and curricular development. In the area of instructional leadership, the Baltic states do not follow a common pattern as well as in promoting professional development and teacher participation in leadership. It seems that the attitude towards different aspects of leadership vary in all the three Baltic states while the UK differs substantially from the rest of the countries by a much higher level of leadership in all four leadership indexes. The pattern of leadership is not clearly defined in the Baltic states. The data about school autonomy indicates that schools in the Baltic countries have a relatively high level of autonomy, and the patterns of leadership in different schools may vary depending on a particular school culture. In the domain of school autonomy, the Baltic states show results which are closest to those of the UK. Lithuania is closest to UK judging by the level of self-governance, with Estonia and Latvia coming the second and the third. What concerns teacher autonomy, Lithuania and Latvia show the average similar to the UK, while Estonia comes closer to Finland. In general, we may observe that schools in the Baltic states, especially Lithuania, experience a similar level of school autonomy as in the UK. A high level of school autonomy and the freedom of decision-making are typical to the liberally-oriented decentralized systems of education.

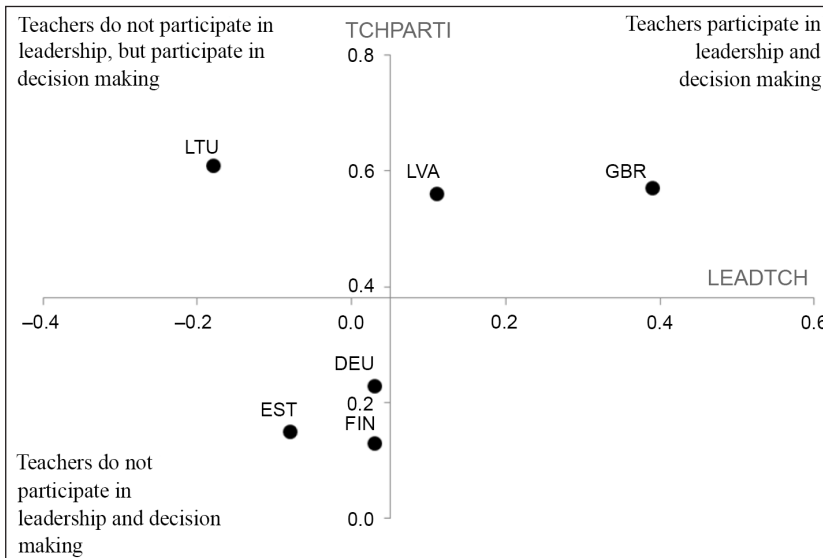


Fig. 4. The index of teacher participation/autonomy (TCHPARTI) and the index of school management: teacher participation (LEADTCH), PISA 2012

ASSESSMENT

We can see that Latvia has the largest average of the assessment index ASSESS³ (Table 5), followed by UK and Lithuania. Estonia ranks in the middle, followed by Germany, and Finland has the smallest average of the analysed index. Latvia also has the smallest dispersion value indicating that the use of the assessment is widespread. In general, we observe that the large average corresponds to the low variance and conversely, except Finland. Regular assessment is typical to the liberal decentralized systems of education. The Baltic states, especially Latvia and Lithuania, have been increasingly introducing assessment schemes. On the other hand, in Finland teachers are highly trusted, and therefore relatively few assessment procedures are applied.

Table 5. The index of assessment use (ASSESS), PISA 2012

Countries	ASSESS	
	Mean	Dispersion
DEU	4.02	1.98
EST	4.41	2.04
FIN	3.87	1.64
GBR	5.20	1.16
LTU	5.01	1.42
LVA	5.52	0.37

All countries use assessment for evaluation of children progress uniformly (Table 6). Lithuania and Latvia quite distinctly follow the UK pattern towards assessment in education. UK shows the highest level of using assessment for instructional purposes. UK, Lithuania and Latvia also demonstrate the highest indicators of using assessment to evaluate school progress and teachers. As for the assessment of curriculum and measuring performance, UK and Latvia have the largest averages.

We conclude that in the approach towards assessment we can also observe evident similarities among Latvia, Lithuania and UK.

Table 6. Countries' clusters for the assessment, percentage for PISA 2012

Purposes of assessment	Average, %	Lower the average *	Higher the average **
Children progress	98.8		
Student promotion	86.9	GBR	LVA
Instruction	44.1	EST, FIN	GBR
National performance	67.3	DEU, FIN	GBR, LVA
School progress	81.4	DEU, FIN	GBR, LTU, LVA
Teachers	60.0	DEU, FIN	GBR, LTU, LVA
Curriculum	80.4	DEU, FIN	GBR, LVA

* <10% countries' average.

** >10% countries' average.

³ Although the variable name of this index is the same as in some of the previous cycles, this index is not comparable with those cycles (OECD, 2014).

SCHOOL SELECTIVITY AND ABILITY GROUPING

Finland uses quite few selection criteria (Table 7), the main one being the residence of students. Germany seems to take the opposite stance and has a selective system with distinct academic and vocational tracks. Germany's average is highest when considering the academic record and recommendations of the feeder school for the purposes of selection. UK and the Baltic states are situated in the middle position between these two different approaches. The Baltic states apply moderate selection where academic performance is considered during recruitment to a selected group of academically-oriented schools.

Most countries use some form of ability grouping (Table 8). However, the average scores show that ability grouping for all classes is most commonly used in UK. The Lithuanian average is close to that of UK, and the Latvian one to the Germany's average. Estonia is in between Germany and Finland. UK has the smallest average for no ability grouping, and Finland has the lowest one. Germany comes close to Finland, but the reasons for no ability grouping between classes are different. German has a stratified system and there is more homogeneity within schools, while Finland is considered to have one of the most comprehensive schooling systems. The results indicate that the three Baltic states practice moderate ability grouping.

Summarizing school selectivity and ability grouping, in many cases the three Baltic states, especially Lithuania, are closer to UK rather to Finland or Germany.

Table 7. The answers to the question "How often the following factors are considered when students are admitted to your school?" Percentage for the answer "always", PISA 2012

Countries	Academic record	Feeder schools	Parents' endorsement	Special programme	Family members	Residence	Other
DEU	48.94	44.35	9.49	34.59	19.48	48.94	5.66
EST	37.05	4.02	10.95	25.22	18.68	51.74	5.50
FIN	3.08	2.69	5.86	2.77	6.11	66.86	4.16
GBR	23.01	20.36	12.41	13.43	27.91	48.42	22.17
LTU	19.05	4.09	23.02	35.39	38.02	60.85	11.58
LVA	27.55	4.07	2.51	37.21	13.80	20.55	2.99

Table 8. The index of ability grouping in mathematics classes, percentage, PISA 2012

Countries	Schools with no ability grouping for any classes	Schools with one of these forms of ability grouping between some classes	Schools with one of these forms of ability grouping for all classes
DEU	31.87	32.88	35.25
EST	10.94	61.10	27.97
FIN	35.55	46.40	18.05
GBR	0.72	37.12	62.15
LTU	15.95	24.68	59.38
LVA	17.77	46.09	36.13

CONCLUSIONS

- There is only one area where all the three Baltic countries show the results similar to that of Finland: the domain of human and material resources.
- The pattern of leadership is not clearly defined in the Baltic states, and in school organization Lithuania and to a lesser extent Latvia tend to move closer to the educational model of UK.
- Considering the approach towards assessment there are evident similarities among Latvia, Lithuania and UK.
- In the domain of school selectivity and ability grouping the three Baltic states, especially Lithuania, are closer to UK rather than to Finland or Germany.
- The findings of the research showed that we cannot view the three Baltic states as representing a single educational model. Latvia and Lithuania are moving closer to a liberal Anglo-Saxon model, while Estonia in certain aspects shows more similarity with Finland.

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RIMANTAS ŽELVYS, AUDRONĖ JAKAITIENĖ, DOVILĖ STUMBRIENĖ

Link skirtingų gerovės valstybių švietimo modelių: Baltijos šalių švietimo sistemų palyginimas

Santrauka

Švietimo sistemos gali būti analizuojamos taikant skirtingus gerovės valstybių modelius. G. Espingas-Andersen (1990) išskyrė tris gerovės valstybių modelius: skandinaviškąjį socialdemokratinį, kontinentinį-korporatyvistinį ir anglosaksišką liberalųjį. Straipsnio tikslas – remiantis šiais modeliais atlikti lyginamąją Baltijos šalių švietimo sistemų analizę. Tyrime naudojami PISA 2012 duomenys ir Baltijos šalys lyginamos su trimis „senosiomis“ ES narėmis: Jungtine Karalyste (anglosaksiškas liberalusis modelis), Vokietija (kontinentinis-korporatyvistinis modelis) ir Suomija (skandinaviškasis socialdemokratinis modelis). PISA 2003, 2006 ir 2009 m. duomenys buvo naudojami retrospektyvinei šalių analizei. Straipsnyje tyrinėjami keturi bendrojo ugdymo mokyklų aspektai: žmogiškieji ir materialieji ištekliai, vadovavimas ir mokyklos autonomija, mokinių vertinimas, mokyklos pasirinkimas ir mokinių grupavimas. Baltijos šalių pavyzdys leidžia teigti, kad nėra susiformavusio vieningo Rytų ir Centrinės Europos gerovės valstybės švietimo modelio.

Raktažodžiai: švietimo sistemos, gerovės režimai, PISA, Baltijos šalys