

*Social Security vs. Educational Opportunity in Advanced Industrial Societies: Is There a Trade-Off?**

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This research investigates whether specific types of welfare states have different effects on social policy outcomes, to see if variations in national welfare systems are related to the particular institutionalization of the welfare state. It builds on the work of Esping-Andersen (1990), who identified three kinds of welfare regimes in advanced industrial societies, and the effort of Francis Castles (1989) to identify the causes for variation in educational spending by Western societies. Specifically, Castles's model to explain educational spending was modified to examine the applicability of Esping-Andersen's welfare state typology to the field of educational policy. The three welfare state types were then tested to determine if variation in educational spending could be associated with the particular constitution of the welfare state. Finally, it was explored if, as Heidenheimer (1981) has suggested, there is evidence of a trade-off between education and other social security policies as alternative welfare state strategies.

Esping-Andersen (1990) has identified three distinctive welfare regimes in advanced industrial societies—liberal, conservative, and social democratic. His typology arranges Western welfare states into three clusters, "each organized around its own discrete logic of organization, stratification, and societal integration" (Esping-Andersen 1990, 3). They differ by their unique social policy agendas and coverage for healthcare, unemployment, and old age compensation benefits. Although education was not among the policy provisions included in Esping-Andersen's description of the social welfare package, it should be. Education policy is clearly one component of a nation's total public policy package; and it is not independent of other social policies. It is the position of this paper that there is a specific relationship between the types of social security programs found in Western societies and the kind of educational policies they support. Therefore, Esping-Andersen's typology can also be applied to the field of education policy, and welfare regimes will then also cluster according to their educational policy

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profiles. Second, there is an explicit trade-off between state spending for education and other social welfare programs. Educational policy is one program among several that must compete—policymakers must consider—for public sector support and expenditures. From one welfare regime type to another, there is specific variation in the combination and measure of state support given to education and other social welfare provisions. Third, this trade-off is reflected in the different mixes of general education and vocational training programs supported by the state. As it represents an agent of social mobility and an alternative to other social programs, general education participation rates will vary between kinds of welfare states.

The 18 nations included in this cross-sectional study are those for whom the OECD compiled the most complete data for 1992 in the 1995 editions of *Education at a Glance: OECD Indicators* and *OECD in Figures: Statistics on the Member Countries*. In order to test for an association between distinct educational policy patterns and particular kinds of welfare states, the OECD nations were coded according to Esping-Andersen's threefold classification of welfare state regimes. Australia, Canada, Ireland, Japan, New Zealand, Switzerland, the United Kingdom, and the United States were assigned to the liberal category. Austria, Belgium, France, Germany, and Italy were put in the conservative group. Denmark, Finland, the Netherlands, Norway, and Sweden were classified as social democratic.

The hypothesis of a relationship between distinctive education policies and the kinds of welfare regimes described by Esping-Andersen is confirmed. There are significant differences in the educational policies supported by advanced industrial societies, as demonstrated by the descriptive statistics, the results of regression analyses, and cluster charts. Liberal welfare states spend the greatest proportion of total public sector dollars on education. They also lead in general education enrollments rates by secondary level students—by such a wide margin that it must be viewed as an alternative educational policy. Social democratic states rank second to liberal welfare states in educational spending, as a share of total public sector expenditures. However, they show a tendency to put more “effort” behind their educational policies—as indicated by the higher real education dollars spent per capita and the larger percentage of the GDP given to educational programs. Conservative nations bring up the rear for all education spending categories and upper secondary level participation rates for general education. Finally, the preference shown by liberal regimes for upper secondary general education over vocational training, along with the greater share of total public sector expenditures devoted to education, provides evidence to support Heidenheimer's hypothesis that education, as an instrument of state policy, is an alternative to other social welfare strategies.

Here's my quick summary. -Carlisle

- Social Democratic: high levels of decommodification (workers do not have to sell their labor to survive), benefits to everyone
- Liberal: low levels of decommodification, emphasize markets and efficiency, only help the needy.
- Conservative: medium levels of decommodification, emphasize on traditional hierarchies.

Sample and Group Averages for OECD Nation Variables

	18 Nation Sample	Liberal Nations	Conservative Nations	Social Democratic Nations
Education as % of Total Public Spending	12.31	13.70	10.08	12.32
GDP per capita (000)	14.13	14.32	14.49	13.46
Public Spending on Education as % of GDP	6.00	5.59	5.30	7.36
Real Education Dollars per capita (000)	8.41	7.96	7.64	9.88
% General Education Secondary Students	51.43	72.00	32.74	37.22
% Vocational Education Secondary Students	48.57	28.00	67.26	62.78

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