# Comparative Studies of Vocational Education and Training

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# Introduction

The studies that follow may be understood as comparative and institutional inquiries into how vocational education and training systems and programmes are designed and constructed in a number of countries. The particular approach adopted is sociological in the sense that the conceptual and analytical aims are to understand how such organisation and design are related to individuals' options as elements of their life chances at the juncture between educational institutions and, primarily, the labour market. Other relations to various realms of society are also illuminated.

Vocational education and training encircle institutions and programmes at a certain segment within the variety and levels of educational provision, and typically, this occurs after compulsory education and in relation to parts of the labour market where those occupations, trades or jobs are found which demand comparatively less preparatory education and training. These programmes exist in a variety of forms, combining diverse forms of subject matter, modes of education and training, in schools as well as in workplaces and companies. It is this variety that the studies seek to understand, primarily through sociological perspectives. One important question here is to understand how it is that vocational or occupational preparation is organised, not only through the design of curricula of educational programmes, but also the institutional ways of involving actors on the labour market in the provision of training. The studies focus on publicly regulated vocational education and training systems and programmes at upper secondary and post-secondary level in Denmark, Finland, Norway and Sweden. These systems exhibit characteristics which vary along dimensions that are typical to vocational preparation in advanced liberal democratic societies – and one of the purposes of analysis, interpretation and conceptual elaboration is to understand these dimensions and characteristics with improved (qualitative) accuracy and (quantitative) precision.

On a more fundamental level, the studies address questions about how these institutions organise forms of learning, teaching and training and relate this to theoretical and practical epistemological claims, providing this to various degrees and, to a certain extent, as a matter of right. To formulate this in a more simple way: educational programmes transmit forms or, what is argued to be, 'knowledge', and these are accessible as a social right to individuals – but how, more precisely, is this so? By employing concepts

such as entitlements, provisions, rights, contracts, opportunity, and life chances, and developing analytical frameworks for understanding the educational programme, the studies seek to, in part, clarify and illuminate some of the most important principles for organising these systems and programmes. In this way, the conceptual framework also touches upon normative questions, related to the purposes of these institutions, and seeks to anchor their interpretation in certain strands of educational studies, historical sociology, sociological perspectives on both education, the development of occupations and professions, and, to some extent, questions of economic nature.

The more specific questions asked are also related to methodological problems associated with comparisons, with measurement, with interpretation of regulatory documents and also with the various methods, some of which are novel, that can be used in order to illuminate or elucidate some of the findings. Both analytical and ideal typical conceptual elaborations are conducted in order to understand how programmes and institutions may, in various ways, be arranged in order to offer entitlements to a diversity of provision of vocational education and training, and subsequently open up, or restrict, opportunities on markets.

In what follows, this introduction will discuss and clarify the conceptual framework, which encircles all of the studies. Particular focus will be directed towards the understanding of life chances, of institutional rights, and the distinction between civil and social rights, thereby enabling a reasonable understanding of how educational programmes can be understood as guaranteed upon entitlement-based principles. Contexts are provided with research strands and contributions that have sought to deal with some of these problems from various perspectives, in particular the relation between education, institutions and markets. In the last section, theoretical and methodological problems that have been present in all three of the studies are discussed more extensively, and some of the reasons for choosing particular approaches are motivated and argued for.

## Conceptual framework

The following discussion and clarification primarily involve a limited (for the problems at hand) and focused reconstruction, disambiguation and reconceptualisation (Sartori, [1984] 2009) of the concepts: 'life chances', 'entitlements' and 'provisions', 'rights', 'social rights', 'resources', and 'educational programmes'. One important aim is to clarify how educational programmes may be understood in terms of entitlements, or rights, and provision, and thus, as elements of life chances.

*Life chances*

A fruitful point of departure for understanding the concept of life chances is to discuss Dahrendorf's (2008) conceptualisation of life chances. The concept of 'life chances' is often derived from Weber ([1968] 2013a; [1968] 2013b)[1], and although the notion of 'chance' was used with several meanings, he often wrote about individuals', or social or economic groups', chances or advantages in relation to various opportunities on economic markets (Dahrendorf, 1979).[2]

Dahrendorf's (2008, 19) approach understands life chances as a function of two elements: options and ligatures. Ligatures are the more diffuse and vague element, but these may roughly be understood as the meaning created in the life world of social actors and the deep cultural linkages and bonds which enable individuals to find their way through the variety of options. The relation between options and ligatures may be understood as complementary: '[l]igatures without options are oppressive, whereas options without bonds are meaningless' (Dahrendorf, 1979, 31). Options are the specific combination of entitlements and provisions (Dahrendorf, 2008, 18), two central concepts in these studies. Entitlements and provisions may be said to encircle the political and economic aspects of life chances and their growth, and may also be said to be historically anchored (Sartori [1975] 2009, 62) in the experience of many of today's Western modern liberal democracies with market economies. On the one hand, there is the slow and subsequent establishment and expansion of civil, political and social rights (Marshall, [1950] 1992); on the other, there is the process of industrialisation and post-industrialisation (Bell, [1973] 1999), and growth in economies which exhibit two important ideal typical characteristics: the institution of private property and the reliance on markets (Aron, 1961, 232). In Dahrendorf's approach, the political conflicts in modern societies are largely about life chances, most often whether by the institutionalisation of entitlements, or through the growth of provisions.

An attenuated focus on options, relates life chances to social norms that have certain strength, and that encircle, or focus on, the important distinctions upheld by legal relations protecting or regulating property, market exchange and spheres of individual action upheld by rights. This focus is also useful in consideration of the formulation of normative principles, such as the definition of rights. Other views on life chances do not necessarily do this, but may include a wide range of aspects of individuals' life situations (cf. Marshall, 1998, 368).

By focusing on the relation between entitlements and provisions, Dahrendorf refers to Amartya Sen's ([1983] 2003) perspective on how it is that 'entitlements' grant access to provisions. Sen's approach views entitlements as the legally legitimate means by which persons can control goods or things of various kinds. Two general kinds of entitlements are highlighted – enti-

tlements in relation to ownership and those in relation to exchange (Sen, [1983] 2003, ch. 1). Persons can be entitled to commodities or goods because the law entitles them to these by accepting certain modes of ownership or exchange as legitimate. Based on this view, 'entitlements' encircle the way that persons may have legitimate control over and access to commodities or goods, and more specifically, the legal means by which persons can command things; the various combinations of modes of access (Dahrendorf, 2008, 9f). Entitlements are expressed in the nature of rights, but they have, like social norms, degrees of fixity; high (as for basic constitutional rights) or low (as real wages) and draw lines as well as constitute barriers (Dahrendorf, 2008, 11). The 'provisions' that entitlements give access to may be understood as the choices available or 'supply side of alternatives in given areas of activity'; not necessarily only economic, but of both material and immaterial kind (ibid.). Provisions can vary in quantity as well as in variety or diversity. Synonyms for understanding the meaning of provisions are not only 'choices', but also 'opportunities'. Dahrendorf has argued that 'provisions' is a preferable term to the similar 'welfare' (which is too close to the idea of the 'welfare state'[3]), as well as 'commodities' or 'goods', which largely encircle material phenomena. Provisions may then be understood to encompass more than what is produced and consumed in the economy.

T. H. Marshall's ([1950] 1992) analysis of how different kinds of rights have, through subsequent expansion, enriched the meaning of membership in a society and influenced inequality may be understood as an analysis of the development of entitlements. However, the focus on equality also relates entitlements to realms of provisions; and Marshall pointed to two important processes of equalisation – the way that civil rights tore down the barriers of estate society, and the way that social rights at a later stage influenced social class divisions and inequalities.[4] The underlying process has been interpreted as a way of opening up 'access' (Bulmer and Rees, 1996, 273) to provisions through the establishment and expansion of equality of entitlements – as well as, particularly in the early stage, creating the conditions for the growth of provisions. The various rights – civil, political and social – progressed from one to the other, as well as enabled one another. Another important point in Marshall's analysis was to view the bundle of rights as rights of citizenship, thereby indicating what full membership in a society – here, the nation-state – actually entails: a basic human equality that is based on individual rights. Upon these rights, various inequalities or diversity and variety arise in economic and other realms of society (cf. Bell, [1973] 1999, 452). It is in this sense that the underlying normative principle of 'equality of opportunity' – in Dahrendorf's (2008) parlance to primarily realms of provisions – is associated with this set of citizenship rights.[5]

The concept of 'opportunity' may also be understood more narrowly and has been clarified and defined by Campbell (1975), where '[a]n opportunity may be said to occur when an agent is in a situation in which he may choose

whether or not to perform some effortful act which is considered to be desirable in itself or is a means to the attainment of some goal which is considered to be desirable' (Campbell, 1975, 51). Opportunities may also be understood as transitory in a temporal sense – seized, forgone or missed. A situation is an opportunity if the outcome of the situation depends on choices made by the individual with the opportunity – this is argued to be the difference between 'chance', where the outcome does not depend on the individual (Campbell, 1975, 54). Furthermore, 'opportunities' may be understood as more than mere 'possibilities' because more concrete, but less than 'guarantees' (Westen, 1985, 839), which in turn, as discussed above, may be understood as a characteristic of rights. Having an opportunity requires that there are no insurmountable obstacles to attaining the goal attached to the opportunity.

It may then be fruitful to further specify provisions obtained through contracts; perhaps the term 'opportunity' is most relevant in such a context, since the contract is often a result of negotiation and agreement. It has been argued that there are many kinds of opportunities, in various realms (cf. Bell [1973] 1999, 451), and further distinctions may be a fruitful way of more accurately pinpointing the variety or diversity of provisions.

It should be noted that central to life chances is the specific combination of entitlements and provisions. Entitlements without provisions are empty legal guarantees that point to nothing; provisions without entitlements form an unjust society in many ways. In the following, various kinds of entitlements will be explored through theories of rights, and in particular the difference between negative and positive rights will be highlighted. This will, subsequently, help to clarify how it is that social rights may be understood as providing some form of resource, particularly when understood in the context of educational programmes.


### Rights

The more general notion of rights may be further analysed in order to extract certain distinctive features; this is a preliminary for a similar clarification of social rights. Rights – a notion, which has an incompleteness and indeterminacy – may be understood as complex normative structures, and the *scope* of a right may be said to specify what the right is to (Martin and Nickel, 1980, 172f).[6] A method for understanding rights is to focus on 'constituent normative elements, function(s), justification' (Martin and Nickel, 1980, 165). One aim of the following conceptualisation is to extract the essential features and characteristics of the range of various rights, which also implies reasoning about their constituent normative elements (Harel, 2005).

Davies and Holdcroft (1991, 230) distinguish between institutional rights, safeguarded or guaranteed by states, and moral rights, which are normative

claims or principles. Moral rights – such as those that are formulated in reasoning about human rights, a fruitful point of reference for understanding the moral dimension of rights – are often argued to be based on a 'conception of persons as separate individuals of equal worth, who should, in Kant's phrase, be treated as ends and not as means.' (ibid.) This may be understood as the 'constitutive' aspect of rights – plausibly, in turn, relating the moral to the institutional aspects of rights – which 'constitute individuals as a particular kind of political subject: free and equal rights-bearing citizens. And by establishing the requirements and limits of legitimate government, human rights seek to constitute states of a particular kind.' (Donnelly, 2003, 16)

Treating persons and ends has also, when rights as encircled within conceptions of 'human rights'[7] (which are often understood as 'moral rights of the highest order' (Donnelly, 2003, 11)), implied that such rights have certain special characteristics: they are equal, inalienable and universal (Donnelly, 2003, 10). A special emphasis has often been the relation to the notion of human dignity (Tomuschat, 2008, 3), with a further possible specification adding that human rights specify the *minimum conditions* for a dignified life. Other important features revolve around ideas about personal, bodily, legal or moral integrity, and yet others focus on the relation to the legal system, or relate the private sphere of conscience and thought to a public realm (Donnelly, 2003). Most of these features are encircled by 'civil' rights. When delineating such features of the moral character of rights, certain values are selected for special emphasis, because these are deemed highly important and indispensable for a life in dignity, and are then advanced – connecting the moral and institutional dimension – through a particular mechanism: rights (Donnelly, 2003, 11). It also appears that certain notions of dignity involve reasoning about social or other relations between persons and in relation to institutions, and this seems to contribute to an important distinction, discussed in the following: that between negative and positive rights.

But before clarifying this distinction, it may be noted that institutional rights have been treated by Weber as legal rights, which, when understood in the context of the state, are guaranteed through the fact that the coercive power of that state may be employed for their realisation (Weber, [1968] 2013a, 315).

'The most usual classification of legal propositions distinguishes, as in the case of all norms, between prescriptive, prohibitory, and permissive ones; they respectively give rise to the rights of individuals to prescribe, or prohibit, or allow, an action vis-à-vis another person. Sociologically, such legally guaranteed and limited power over the action of others corresponds to the expectation that the other persons will either engage, or fail to engage, in certain conduct without interference from a third party' (Weber, [1968] 2013b, 667). Particularly important, in this context, legally guaranteed expectations are the 'freedoms', distinguishable into situations where persons are protected from interference by third parties (for example, freedom of

movement, of conscience or freedom to dispose of property), and those 'which grant[…] to an individual autonomy to regulate his relations with others by his own transactions' (Weber, [1968] 2013b, 668). Among the latter, we find freedom of contract. For Weber, "freedom" understood in the legal sense implies the possession of rights, actual or potential.

Civil rights may thus be distinguished into two kinds – a plausible reason for the expression 'civil rights and liberties' – however both revolve around the idea of non-interference, thus making them 'negative'. We here touch upon the distinction between negative and positive rights, which have also been divided into 'generations' of rights. The first generation of rights are often understood as 'negative' – here, we find the above mentioned civil rights that protect the personal freedom of individuals from interference, equality before the law and freedom of contract – while the second generation of rights is often understood as 'positive' – where such rights entitle rights-bearers to the provision of some good or service (Tomuschat, 2008, 25).[8] Use of terminology referring to 'generations' seems to bear semantic import from the notion of 'historical succession', and while negative types of rights have, historically, often preceded positive rights; the former are also an important and indispensable precondition for the latter. Dahrendorf (1994) has argued that it may be fruitful to view 'civil rights' as fundamental and indispensable among various rights – 'the integrity of the person, due process of law, freedom of speech and other rights of expression' (Darhendorf, 1994, 13) – while other rights emerge from this core in expanding circles of relevance and importance. Such a characterisation implies not only value judgements about the relative importance of various rights, but may also illuminate how various rights presuppose and depend upon each other.

Marshall's ([1950] 1992) exposition of the subsequent expansion and institutionalisation of rights distinguished between not two, but three elements. 'The civil element is composed of the rights necessary for individual freedom – liberty of the person, freedom of speech, thought and faith, the right to own property and to conclude valid contracts, and the right to justice.' (Marshall, [1950] 1992, 8) The political element concerns primarily the rights to participate in the exercise of power in government, through vote or election. The social element was, however, more diffuse – it ranged from a 'modicum of economic welfare and security' (ibid.) to the right to take part in the social heritage as well as to certain living standards common in a given society. In Marshall's view, the relevant institutions connected to social rights were the educational system and the social services.

Distinguishing 'negative' from 'positive' rights has been compared (as well as confused) with a similar distinction between two concepts of liberty, discussed and clarified by Isaiah Berlin ([1958] 1997). The answer to the question about the extent of negative liberty that an individual has lies in answering what the sphere of action where no one can interfere is. The answer to the question of an individual's positive freedom, in contrast, lies in

answering what the source of control over an individual's actions is (Berlin, [1958] 1997, 194). One interpretation of positive freedom implies defining the aims and goals that individuals should have or pursue, their freedom thereby being coextensive the extent to which they reach these aims or goals. It has been argued that this is possible to interpret as a legitimation of oppression and tyranny (Berlin, [1958] 1997, 209) – not to treat individuals as ends in themselves, but rather devise aims and goals for them, implemented through state policy. It has also been argued that the use of the term 'freedom' in the sense of being 'positive' is actually better understood as a form of 'power' (Hayek, 1960, 16f). This meaning is imbued when 'liberty' is understood, more generally, as the absence of restraint (including subjective and inner restraint), which does not come from other individuals – meaning effective power to do whatever one wants. In this context, this meaning of 'liberty' has also led to its identification with 'wealth' (Hayek, 1960, 17).

If the proper use of 'liberty' is the absence of coercion by other individuals, then this is, admittedly what civil rights seek to encircle. Rather than perceiving positive rights as positive because they enable positive freedom – a problematic conception – their positive aspects should be based on the notion that these grant access to some form of provision of a good or resource, which implies redistribution. Social rights, in turn, may then be understood, in terms of options, as the entitlement to provisions of some kind, guaranteed by the state (or some other level of jurisdictional authority). A few other plausible features – if social rights aim at contributing to a basic human equality – are that these are institutional, and the kind or level of provision is somehow associated with minimum conditions of dignity. However, a further question is the characteristic of provisions and the relation to notions of 'resources'. This will be discussed below.


### Social rights

It is plausible to understand rights as 'social' in various ways. One view is that such rights are dependent on some form of financing or organisation, which implies taxation and redistribution through the state (or some lower level of jurisdictional authority). Social rights are often considered to be part of public law, while a civil right such as freedom of contract is part of private law. The distinction between public and private law is, however, more complex when viewed through the lens of entitlements and provisions. It has been argued that the welfare state is a system of resource transfer designed to guarantee the effectiveness of all citizenship rights (Dahrendorf, 1985, 94). The 'social' refers to the state, which is why those aspects of state activities at times refer to the 'social state'.[9]

The 'social' element may also be understood in the sense that social rights somehow relate to a 'social sphere' or to 'society' – Marshall's formu-

lation of social rights referred to 'standards prevailing' in society and to the 'social heritage' (Marshall, [1950] 1992, 8). This has often been understood as varying depending on historical and other circumstances. While that variety may then be considered an important element, there is also an idea that it refers to some form of minimum (cf. Titmuss, 1974, 29). The minimum is often associated with perceptions and interpretations of what poverty, destitution, or multiple deprivation means and implies. In order to alleviate such states, it has often been suggested that policy may influence the distribution of, what are termed, 'resources'.

In an influential treatment, Townsend (1979) conceptualised such 'resources' as including 'capital assets, value of employment benefits; value of public social services other than cash, and private income in kind' (Townsend, 1979, 177). These resources were seen as influencing individuals' standards of living. The connotative range, Townsend conceded, was more elastic than earlier definitions, which typically consisted of income only. Yet, resources are still monetary, and it is the monetary value that is estimated.

However, other earlier definitions provided a more complex discussion, such as an influential one offered by Titmuss of 'command over resources-in-time', for the purpose of understanding how these could influence income. 'Any definition of "resources" would, to be realistic, have to include much more than income actually received and statutorily recorded for a specific period. It would have to embrace the possession of stored wealth, command over certain other people's income-wealth, expectations of inheritance from the past and untaxed gains in the future, power to manipulate and use the critical educational, occupational and nuptial keys to wealth advancement, and much else besides.' (Titmuss, 1962, 69)

Even wider definitions of resources have been advanced in level-of-living studies, based on a 'command-over-resources' approach, which was developed with reference to Titmuss' 'command-over-resources-through-time' (Erikson and Åberg, 1987, 3).[10] A definition is: '[t]he level of living is the individual's command over resources in a given context to control and consciously direct his living conditions' (ibid.), and the initial formulation of 'command over resources' encompassed resources in 'money, property, knowledge, psychical and physical energy, social relations, security etc.'[11] (Johansson, 1970, 25). The definition of 'resources' is here different, and encompasses more than monetary resources; a variety of phenomena, from psychological to economic seems to be included. The connotative features of the definition appear to be lacking, and the crucial distinction between inner subjective and external, particularly monetary, resources is not present.[12] It appears that such a definition also includes ideas of positive freedom and power discussed above with reference to Berlin ([1958] 1992) and Hayek (1960). Here, as well as in Titmuss' proposal, more precise distinctions appear to be necessary parts of conceptualisation, partly in order to not blur

important and essential distinguishing features. It should also be noted that while Titmuss' definition of resources was dependent on 'the power and opportunity to rearrange income-wealth over time' (Titmuss, 1962, 69), resources in the level of living approach relate to 'living conditions', some of which appear to be detached from income.[13]

It would seem that the resources that are economic, for example monetary or financial, or in the sense of directly relating to material wealth, would be an extracted (Sartori, [1984] 2009) core of connotative features and a minimal definition of resources, as well as a fruitful one, particularly when discussed in relation to distributional problems or policy domains. This may also be a fruitful point of departure when considering allocation of resources to educational programmes, where allocation is understood as the 'positive' aspect of social rights. But, it does not clarify the more complex content of services provided.

In an influential interpretation of Marshall's idea of social rights, Esping-Andersen highlighted their de-commodifying impact – to the extent that these have 'the legal and practical status of property rights, […] are inviolable, and […] are granted on the basis of citizenship rather than performance' (Esping-Andersen, 1990, 21), which entail an individual's independence in relation to the market.[14] Here, then, a difference between civil and social rights again becomes visible – the latter are more closely tied to the status of being a citizen because of the active involvement of redistribution through the state, and the need to clearly define those who are eligible.[15] In this connection, the relation between civil rights and citizenship (in the horizontal sense) may be questioned. Civil rights, and notably freedom of contract, may in various ways lie in tension and conflict with the status of citizenship, similarly as was the case with the relation to privileges associated with estates prior to the establishment of equal civil rights. Civil rights can be said to be an indispensable part of citizenship, but not conditional upon it.

The perspective where aspects of social rights have been understood as comprised by institutional features and characteristics has been prevalent also in approaches studying social insurances, such as the codification of various aspects of old-age pensions, unemployment, sickness, and work accident insurances in the Social Citizenship Indicator Program (Korpi and Palme, 2007). Cross-comparative research of welfare states in primarily Western advanced societies – OECD countries that have been political democracies from the post-war period and onwards; a most-like cases approach – has been conducted by using these indicators of social insurances, for example, in studying levels of poverty and inequality in relation to pensions and sickness insurance (Korpi and Palme, 1998), or the historical development of how various duties were attached to social rights (Sjöberg, 1999). Social insurance programmes are here analysed in detail with regard to certain core characteristics or features that recur in many actual cases of insurance design. Such features are transformed into variables, which categorise

various aspects of these insurances, for example, conditions for eligibility, forms of financing and replacement rates in terms of income (Korpi and Palme, 2007). The 'resources' that programmes here provide is income: the replacement rate indicates the exact amount an insurance taker is eligible to receive. Seen from a life chance perspective, and particularly in relation to options, the focus is then on the entitlement side only. Neglecting the variety or diversity of provisions in various areas, particularly the economy, withholds understanding of the wider meaning of options available through entitlements. This can partly be dealt with in empirical studies through case selection, but it is an indirect and partial approach.

Thus far, the treatment of social rights and a reasonable approach to 'resources' has understood these as being possible to understand, largely, as being located within the entitlement side of options. The problems with extending connotative reach in definitions of resources – and the importance of distinguishing between resources that are inner and subjective, and those that are external (for example, characterisable as monetary or financial, or even material) – in contexts where institutions that organise rights are studied will be further discussed and clarified below. With regard to educational programmes, the notion of resources will be limited to what is allocated to those programmes, and their particular design of educational content, which guides teaching, learning and training.

### Rights and educational programmes

Viewing education as a right[16] also implies that it is a good that somehow should be distributed on the basis of equality. However, there is a tension already at the outset of such a conception: how can education be distributed equally, when merit and achievement are such important aspects of the teaching and learning process, which lead to inequality of educational results?

A fruitful point of departure for a theoretical clarification is to focus on educational programmes and seek to understand which aspects of programmes may be understood in terms of rights, or entitlements. The focal points, understood as most relevant, in studying educational programmes and institutions through the lens of rights, albeit with a sociological orientation towards life chances, are the following.

First, the extent to which there are no fees attached to enrolment in programmes is a basic interpretation of the entitlement to education. This is, however, not the explicit focus of the studies, partly since, for the studied programmes, there are generally no tuition fees or costs related to admission.[17] Rather, when focusing on the actual educational programme and its design, the focus is on which parts of the programme are guaranteed. When resources are allocated to parts of programmes, a certain extent of provision

is guaranteed for those admitted, and may then be understood as a right – distinguished from those parts of programmes, which may not be possible to guarantee. This also implies that the allocation of guaranteed resources is based on some egalitarian principle. The manifest curriculum provides the specification of the content and learning aims of teaching, learning and training, and resources are allocated in various ways to the whole or part of this curriculum. Study 2 may be said to illuminate – even visually – how this occurs in various types of programmes. The attainment of the learning aims of the curriculum is partly the learner's responsibility, and it is here that we can consider these through notions of merit or achievement.[18] But, as study 2 in particular also shows, in most programmes of vocational education and training only certain parts of the programme are guaranteed.

Second, programmes may be accessible on a formally equal basis, typically conditional upon various formal learning prerequisites. Based on this view, there is an 'entitlement' to apply to educational programmes, which then offer a certain curriculum wherein teaching and learning occurs. Prior learning prerequisites – often codified and stated in certificates or diplomas of various kinds – may then function as a form of entitlement to apply to programmes, under various criteria (this is an important focal point in study 3). The entitlement to take examinations and possibly obtain a certificate or diploma in a programme at one level of education in order to be entitled to apply for admission to a programme at a level above exhibits the importance of such formal documents.[19] Here, the position of programmes within the 'hierarchy' of various 'levels' of education becomes visible – admission to one level often requires completion at a level below. A guiding framework has been the ISCED classification of education (UNESCO, 2012), where levels of education are, in part, classified depending on their position within a hierarchy of programmes.

The public systems[20] and programmes studied are in the first two studies located at upper secondary level of education – in Denmark, Finland, Norway and Sweden – and in the third study at post-secondary level of education (but uncertainly straddling the boundary to tertiary education) – in Denmark and Sweden. All systems may be regarded as public – although some have more complicated organisation.[21] All programmes may be classified as 'vocational' education, but to various degrees and with varying organisation – the studies illuminate as much. In all cases, upper secondary level is attended by youth, after 9–10 years of compulsory education has been completed, although in the Danish case, a substantial amount of students are adults. Most programmes at this level are accessible to adults as well, and thereby may be understood as options for re-training or further education to individuals already on the labour market. Furthermore, many of these programmes do not only demand learning prerequisites from the lower levels of the education system, but also employ mechanisms of validation of prior learning, thus admitting individuals with wider and more diverse prior

educational (or labour market) experiences.

Such a focus is also one that views these programmes and institutions as available options for further education, open to individuals who are changing their situation or in the midst of changes on the labour market. Unemployment, the need or the choice of changing occupation or career may induce individuals to apply to programmes, which offer the means to take the necessary steps into a new career, professional area or economic sector. Such aspects of these institutions, which may be understood in part as related to social policy – if social policy is understood as related to alleviation of risks on the labour market – should be related to other, competing or complementing areas of policy.[22] From another perspective, some of the more general types of such programmes provide the first choices for choosing to steer into a future intended occupation or trade. Upper secondary level is one of the lower, or the lowest, levels of public education in the studied cases where vocational preparation is organised.

Several of these points will be further clarified below.

First, educational resources may here be understood in relation to the amount of time that teachers have with respect to various aims and content, as stated in the manifest curricula and syllabi[23]; in two of the studies, their distribution along a time axis are central in understanding differences and similarities between different types of programmes. When discussed in terms of school systems, most 'resources' seem to be financial (see Monk, 1992). It is advisable to define 'resources' minimally, and if the core of the concept is focused on as extracted from the contributions discussed above, it will imply resources that are financial, which are distributed over time[24] and enable, along learning and training, teachers' professional practice in relation to the various demands set by the curriculum. The studies here highlight various formal aspects of the curriculum, from certificates and diplomas, to the organisation of learning and training in various contexts through syllabi. In relation to resources, the concept of educational provision, may be understood in terms of various aspects of programmes: as the variety of provision of guaranteed as well as non-guaranteed parts of programmes (which is touched upon in studies 1 and 2), as the variety of providers of the whole programme; or in terms of variety indicated by some classification of certain important features of programmes (as in study 3).

Second, the above mentioned formal, or manifest, aspects of the curriculum allow us to make a distinction which O'Neill (1976) has highlighted – contributing to the discussion about how normative principles such as 'equality of educational opportunity' should be understood in the educational setting and provide lucid arguments that policy considerations and efforts at 'equalizing opportunities' should focus on what is considered to be within the 'public domain'.[25] The consideration of what delineates and bounds the public domain wherein control is exercised in order to realise normative principles is a contested area of discussion. Various views have been ad-

vanced, and have also shifted during various periods of time. 'As there are many views on what is or should be the limits of public control, there are many views of what is required to make opportunities equal.' (O'Neill, 1976, 277) It is reasonable to consider financial or material resources providing the means for teaching and learning as those that are within the domain of policy considerations concerning allocation of resources.[26] In this view, policy is directed at the allocation of resources to programmes, which are then used in teaching and learning – thus, the connection to the learning results is weak. This disconnection between allocation of resources founded upon some normative (egalitarian) principle, on the one hand, and the actual content and learning aims of the teaching and learning process, on the other, is a way of decoupling allocation from the actual learning and teaching process in schools and (for vocational training) in workplaces.[27] This is, however, not always the case in empirical instances – but here it primarily serves to sharpen the analytical distinction between allocation of material resources to a programme, and the results of the teaching and learning process for which these may be used.

## Historical anchorage and analytical approach

Education and its relation to the normative principle of 'equality of opportunity' will in the following be discussed and clarified in line with the above conceptualisation of rights, life chances, entitlements and provisions. Educational programmes may be understood in terms of entitlements that grant access to or enhance various opportunities. For vocational education and training in particular, the most relevant sphere of opportunities are those on the labour market.

In an influential treatment from a sociological perspective, two aspects of education were identified as recurrent in many historical forms; one part of education that is common and one that is specialised (Durkheim, [1956] 2006, 78f). In a similar vein, Brint (2006) has summarised the aims of education as threefold: the transmission of knowledge, of conduct and values, and the preparation for the labour market (actually, 'class or occupational structure' (Brint, 2006, 23)).

From a historical perspective, the specialised aspect of contemporary vocational education and training institutions and programmes may be contrasted with apprenticeship training provided within guilds, prior to the establishment of important civil rights and the opening up and creation of markets; labour markets in particular. Weberian perspectives on how interest groups may monopolise opportunities – or 'chances' – are here relevant with respect to ideal typical perspectives on the purposes of guilds. A historical type which may serve well as a contrasting background referent, particularly when studying these types of educational institutions, is the 'craft guild',

which has a few important purposes – to maintain the livelihood and standard of life, and to secure and maintain equality of opportunity for its members (Weber, [1927] 1981, 138f). These are examples of more general sociological types of social closure: the monopolisation by status groups of various remunerative opportunities in contexts of competition, who thus become 'interest groups', often through the establishment of legal orders (Weber, [1968] 2013a, 341f). Guilds are one kind of group formation, explicitly based on shared qualities through training or apprenticeship; but the more general as well as vague demarcating lines relevant are those related to 'occupations', which, in Weber's view may be understood as 'the mode of specialization, specification, and combination of the functions of an individual so far as it constitutes for him the basis of continuous opportunity for income or earnings.' (Weber, [1968] 2013a, 140)

Generally, studies on how such features of group boundaries are formed on labour markets, in workplaces and enterprises, and through associations are important lines of inquiry in the sociology of occupations. In particular, the monopolisation or the opening up of access to markets is an important focus also when studying occupations and professions. Sociologically, access to markets often relates to questions concerning social closure, along occupational lines. Sociological studies of occupations and professions have often highlighted how attempts at professionalisation use various mechanisms for creating boundaries of entry to a particular occupation or profession. A common research problem is the delineation of the features or characteristics, such as prestige, formalised knowledge or labour market shelters, which distinguish professions from occupations (see for example, Freidson, 1986). Similarly, another line of inquiry focuses on how various professions form and claim 'jurisdictions' – the link between a profession and its tasks – in various arenas, and thereby advance their position (Abbott, 1988).

In relation to the discussion on elementary rights above, the free choice of occupation may be considered an important right – often interpreted in the sense that there must not be systematic restrictions to work in certain occupations or professions. Connected to this is the more general view, that is, opportunities which are to be equal are opportunities on markets – this is particularly relevant in the context of vocational education and training. 'Access' is a term that is here pertinent and it encircles the presence or absence of legal barriers or obstacles to realms of provisions, for example, various kinds of opportunities on markets.

A general perspective on 'equality of opportunity' may then be said to relate both to civil and social rights.[28] Briefly, there is, on this view, equality of opportunity if there are no systematic obstacles that prevent someone from seizing an opportunity. This is historically related to the civil right to form valid contracts. But it can also be argued that in advanced economies, where most employment in occupations and professions demand a certain level of education and vocational preparation, equality of opportunity would

also imply the entitlement to access educational programmes that enable, or enhance, possibilities for such employment opportunities. (What these programmes are, at what level of education, with what extent of specialisation, are, however, contested issues – it also follows historical changes and varies across countries.) This may be understood as the aspect that relates to social rights, which implies that a certain level of education is guaranteed as a matter of entitlement. The studies, in particular study 2, seek to illuminate how the construction of programmes may create various ways, by which the entitlement and provision of vocational education and training open up, restrict or enhance access to various opportunities – both training opportunities as well as employment opportunities.

This historical perspective can, in the context of Western liberal democracies, also be said to draw a general demarcating line between modern and estate societies – the development of various rights is, in Dahrendorf's (2008) perspective, a progression from one to the other, and it is a partial realisation of ideals of equality of opportunity. In the early stage, the establishment of equality before the law, freedom of trade and contract opened up for the growth of opportunities, primarily by expanding markets. And the expansion of the labour market also saw the development of new trades, occupations and professions.[29] For Daniel Bell ([1973] 1999, 426), equality of opportunity is the principle upon which the social structure of modern society is based. 'As a principle, equality of opportunity denies the precedence of birth, of nepotism, of patronage or any other criterion which allocates place, other than fair competition open equally to talent and ambition' (ibid.). Estate society, on the other hand, allowed only birth right of inheritance access to institutions and positions of power and status, and in limited cases through family connection or purchase. Special law restricted opportunities or chances by means of status boundaries (Weber, [1968] 2013b, 697ff). The distance between the two ideal types may also be understood in terms of a development from ascription to achievement.[30] As noted above, with Dahrendorf (2008; 1994), this development may be seen as the twin processes emerging out of as well as constitutive of the modern social conflict: the extension of markets and the development of institutional rights, of provisions and entitlements.

Contemporary sociological perspectives on the relation between education and the labour market, particularly those that focus on vocational content and aspects of education, often employ the concept of 'skills' in order to analyse the variation in institutional arrangements of education systems and their connection to labour markets – for an overview, see Thelen (2008); see also Mayer and Solga (2008) (for criticism on the use of various central terms in vocational education and training, such as 'skills', and their dependence on national education system contexts, see Brockmann et al. (2010)). Other studies, which employ the idea of 'transition'[31] between educational institutions and labour markets – for overviews, see Kerckhoff (2000) and

Ryan (2001) – identify variety in institutional design by focusing on various stratification characteristics of education systems, most often of vocational education and training. Seen from another perspective, the studies here may be said to some extent explore aspects of the 'intersection' between education systems and the economy – for an overview, see Brinton (2005).[32] The analytical focus in many of these perspectives is less concerned with how opportunities are arranged through institutions and markets, bear less of an analytical perspective from the point of view of the individual actor, and are often analysed at aggregate level. The questions asked are also often more economic in analytical orientation (cf. O'Neill, 1976, 289f).

The comparative studies here, while touching upon similar questions as studies with the mentioned perspectives above, seek to highlight the importance of viewing these institutional arrangements through an analytical lens that takes the individual's rights and opportunities into account; the structure these have within and between institutions; and their meaning with respect to the legal strength of norms, thus providing combinations of life chances; and crucially, distinguishing between what is guaranteed, and what is not, as a matter of right. They also seek to provide a more complex analysis of the content of education by focusing on the intricate organisation of elements of programmes, with the attempt, explicitly in one of the studies, to a limited construction of ideal typical features.

A general analytical approach in these studies is then to view the individual as situated within and between formal institutions and markets, wherein the individual can orient his or her social action. With the conceptual framework discussed above, the options available may be understood through various combinations of entitlements and provisions. It can also be argued that individuals may be perceived analytically as hypothetical actors within typical situations (Popper, [1945] 1974b, 97; cf. Hedström et al., 1998). (Partial) intentional explanations may be attributed to these hypothetical actors, partly through the analysis and interpretation of the rules and norms prescribed by and through institutions – a prerequisite here is also the assumption that actors choose rationally among alternative options (Hedström and Swedberg, 1996, 132). The analytical focus is on the institutional (and market) coordinates wherein actors may choose, and any attempt at analytical explanation will then be derived from an interpretation of these, with reference to intentions, or reasons (Doyal and Harris, 1986, 63).[33] It can be argued that such an approach may be understood as sharing elements of forms of methodological individualism (Hedström et al., 1998); however, the analysis of intentions is derived from what may be understood as the 'logic of the situation' (Popper, [1963] 1994, 166) between and within formal institutions and market situations. The analysis of the institutions and programmes may be said to consist of interpreting these coordinates through the conceptual framework, and thus the partial illumination – through the formulation of consecutive terms (Aron, [1967] 2009, 239) – of sequences of options

available to individuals, and interpretable to them, thereby possible to understand analytically as intentions. The institutions are to be considered as formal – codified in legal regulation of various strength and interpretable, prescribing and prohibiting actions (Weber, [1968] 2013b, 667) – and interpreted by the individual. On a more fundamental level, formal institutions may be understood as legal norms, which are backed up by sanctions, because under a jurisdiction (here, at the level of the nation-state) (Dahrendorf, 1979, 68).[34]

One important focus in these studies is the manifest curriculum and its regulation. This has been argued to be a neglected area within the sociology of education (Gamoran, 2002). When theorizing the curriculum, the reference to concepts such as 'knowledge' is complicated. The transmission of 'knowledge' is often seen as the central, though not exclusive, concern of education (Schrag, 1992, 268). However, diverse views concerning 'knowledge' are, of course, examined in the branch of philosophy called epistemology, which is why the term 'knowledge' should be used with caution and with many qualifications; and the focus in these articles does not venture into the vast areas of epistemology, but rather studies the organisation of the teaching and learning of aspects or 'forms' of 'knowledge' (Hirst, 1974) as these appear in the subject matter specified in curricula and syllabi, and in the organisational context of vocational education and training programmes. This is one possible way of delineating the content of curriculum; strands of curriculum research often seek to identify 'themes' around which the content of curricula is organised (Goodlad and Su, 1992). However, while 'themes' may be identified, the interpretation of the epistemological content is much more problematic. This is also one of the difficulties in conducting comparisons of curricula, and establishing equivalence with regard to such content.[35]

The focus on the curriculum, and its complex relation to epistemology, also directs attention to the circumstances under which the curriculum and its aspects of regulation are developed.[36] Without specifying these circumstances in detail, a general approach is to view curricula and syllabi as more firmly based on epistemological concerns and thereby closer to approximating aspects of 'knowledge' if a number of institutional and societal conditions are fulfilled. The enduring protection and respect of civil rights and liberties would appear to be essential here, since these would guarantee the freedom of thought and criticism (Popper, [1945] 1974b, 226f) and provide intellectual and spiritual conditions where the development and formulation of curricula in public curriculum development centres could be assumed to be less distorted by ideological or indoctrinating influences. Such general conditions are important to consider when selecting cases for empirical comparison in order to improve equivalence and validity – more on this below.

**Theoretical and methodological issues**

In the following, some central problems in dealing with concepts, which relate to institutions and rights will be discussed; particularly with regard to their normative elements. Conceptualisation will then be related to conceptual elaboration, one aspect of ideal type construction. Ideal types, and some of their particular philosophical underpinnings will be clarified and, finally, related to the method of comparison. These problems, which are both conceptual and methodological, have been present and are central concerns in all three studies.

*Value references and conceptualisation*

Before reconstructing and forming the relevant conceptual framework, a preliminary step is to identify the value references.[37] The notion is derived from Weber (Weber, 1949, 76[38]; Aron, [1967] 2009, 229ff) and refers to the selection of 'cultural values', which guide conceptualisation and choice of empirical material. It is a way of specifying the point of concern, interest or view, from which conceptualisation and empirical inquiry then proceeds.

One reason for establishing such value references – in these studies, primarily the general idea of 'equality of opportunity' – may be understood to, in part, stem from what has been called the 'synthesising' aspect of sociology; the identification of the relations between aspects or spheres of society or economy (Aron, 1961, 21ff). More specifically, the focus in these studies is on the orientation within formal institutions towards markets, but also towards polity and culture, as well as the influence from these realms, and from various interest groups. Not the least, the distinction between different types of rights in the conceptual framework – into civil, political and social – is also a way of delineating differences based on what kinds of relations such legal rights regulate or give rise to. Another way of understanding these synthetic points is to use Daniels Bell's ([1973] 1999) notion of 'centrality', which may be understood as the points that tie various 'realms' of society to each other. Conceptual schemas may employ axes that sharpen focus on certain aspects of societies, which may then be sequentially compared with respect to differences and similarities along these dimensions. Such focal points may be understood as 'organizing frames around which […] other institutions are draped' (Bell, [1973] 1999, 10); the emphasis is on significance in the sense of 'meaning' (Bell, [1973] 1999, 12). But formulating value references means dealing with general problems (Aron, 1961, 24), in ways understood to be more important points of concern. While there is a plurality of concerns, there is a need to select the more important problems and allow them to guide conceptualisation and empirical inquiry. Value ref-

erences thus imply one point of view, and will thereby offer a particular attenuated view (out of a possible plurality) of an empirical phenomenon. It is a way of discriminating, of selecting what is understood to be essential (Burger, 1976, 82). Another way of expressing this is to argue that the value references that guide inquiry should be related to problems as seen within a given historical context,[39] from which particular themes of inquiry are then chosen for further clarification and elaboration. Asking fundamental questions is a way of formulating problems, and problems are in Popper's ([1963] 1994, 155) view the point of departure for any scientific inquiry.[40]

While value references may be understood as general statements or general ideas, conceptual frameworks[41] may be said to relate or clarify these central value references. These may be understood as, at least in its initial exposition, consisting of 'sensitizing concepts', which give a 'general sense of reference and guidance in approaching empirical instances' (Blumer, 1954, 7).[42] However, with a limited subsequent conceptual analysis, consisting of primarily a limited reconstruction and disambiguation (Sartori, [1984] 2009), certain core concepts are defined more accurately through conceptual clarification (Merton, 1968, 168). The conceptual framework developed above also seeks to retain a certain historical anchorage, which aims at restoring the fact that meanings are 'not arbitrary stipulations but reminders of historical experience and experimentation' (Sartori, [1975] 2009, 62). This, in part, implies that concepts are also bounded by certain case-specific parameters – associated with historical contexts wherein certain types of political constitutions, educational institutions and labour markets exist. (This will be treated further when discussing case selection.)

It should be noted that conceptualisation may be imbued with value judgements. Strauss ([1953] 1963, 431f) has argued that a description or presentation of a social phenomenon may imply value judgements, or that it at least implies using words that have evaluative undertones. But even more than this: the rejection of value judgements may endanger historical objectivity (Strauss, [1953] 1963, 437); not using or avoiding certain words because they are evaluative or imply a value judgement would be to distort the presentation of social phenomena. Aron (1961, 29) also points out that analysis and interpretation will to a certain extent contain evaluative aspects, phrases or words; these are inevitable. Townsend (1979) has, in turn, even argued that policy prescriptions may permeate conceptualisation, measurement and the formulation of theory – on this view, value assumptions may be present in most steps of the research process (Townsend, 1979, 61). This is particularly relevant when concepts such as 'right' or 'opportunity' are discussed or clarified. For rights, this is crucial because delineation pinpoints the distinction of what is guaranteed or distributed under some egalitarian principle. Furthermore, related concepts also would need to have their connotative features assessed, with respect to whether they fall within what is considered a legitimate policy domain (cf. O'Neill, 1976). Generally, in con-

sidering aspects of rights or policy, it is often necessary to explicate what is present in any model of, for example, social policy: values and assumptions about the means and ends of policy (Titmuss, 1974, 32). On a more fundamental level, the definition of what is to be considered 'social', or the domain of social policy, also involves value judgements.[43] Whenever interpretation or clarification of concepts demands decisions or judgements about the most reasonable definition, arguments should be presented for the chosen interpretation.

### *Conceptual elaboration and ideal types*

The interpretation and analysis of the empirical material may be understood as a form of conceptual elaboration. Both study 1 and study 2 employ such an approach. In particular, the elaboration of aspects of ideal types in study 2 highlights this process. It may be argued that the value reference that is central here – equality of opportunity as expressed in institutions and institutional rights that relate to realms, primarily markets – is also a form of ideal type, which, through comparative empirical analysis is refined and elaborated upon. Through conceptualisation, as done above, more detailed concepts are defined with a certain historical anchorage. These may be understood as general background concepts, 'sensitizing', which are then elaborated on through the study of certain more concrete cases: vocational education and training systems in particular case contexts.

The concepts developed through the comparative empirical analysis may also be understood as reconstruction[44] of concepts, which in Weber's view is 'the dissolution of the analytical constructs so constructed through the expansion and shift of the scientific horizon – and the reformulation anew of concepts on the foundations thus transformed […] The greatest advances in the sphere of the social sciences are substantively tied up with the shift in practical cultural problems and take the guise of a critique of concept-construction.' (Weber, 1949, 105f) Similarly, Aron (1961) has argued that three central advances that can be accomplished in sociology are 'to know facts with increasing precision, to go on asking new questions, and to refine and make more rigorous the conceptual systems which they use to interpret the facts'. (Aron, 1961, 29) Study 2, in particular, may be said to seek to develop inquiry in all three of these areas.

In Vaughan's (1992, 175) case-oriented approach, conceptual elaboration implies that 'more than one theoretical notion may be guiding an analysis, [and therefore] confirmation, fuller specification, and contradiction all may result from one case study' (Vaughan, 1992, 175); thereby, concepts may be elaborated in order to specify more clearly the circumstances in which explanations may be offered. Particularly in the context of study 2, the purpose is the elaboration of concepts that construct ideal types and their features, for

various dimensions and levels of abstraction – this involves the identification of relevant dimensions, as well as the specification of how dimensions are related to each other, and the attenuation and clarification of relevant features. There are here several conceptual levels, and analyses may proceed to various stages in the process of ideal type construction. However, the process of ideal type construction can scarcely be understood as ever complete; higher levels of refinement can always be achieved, through the inclusion of more cases, of more dimensions, further conceptual elaboration and so on. Conceptual elaboration here begins by identifying (what are understood to be) equivalent empirical phenomena, but tries to interpret them as specific configurations along dimensions of ideal types, which are conceptually clearer. Interpretation may here be said to, with an apt formulation, 'strive[…] for clarity and verifiable accuracy of insight and comprehension'. (Weber, [1968] 2013a, 5)

A few comments on the methodological and epistemological status of ideal types may further clarify some of these points.

The ideal type may be understood as a form of 'stylization' or 'rationalization': as a concept, it 'does not retain the characteristics of all examples included in it, let alone the average characteristics of the examples in question; it focuses on the typical, essential.' (Aron, [1967] 2009, 245) A process of abstraction is involved, yet it is limited,[45] and it is partial, elucidating only a few, but attenuated or exaggerated characteristics of empirical phenomena. In this sense, 'sociological analysis both abstracts from reality and at the same time helps us to understand it, in that it shows with what degree of approximation a concrete historical phenomenon can be subsumed under one or more […] concepts' (Weber, [1968] 2013a, 20).

The process of abstraction may be discussed by contrasting sociological types to historical concepts. In Weber's view, 'the concepts of sociology is responsible for the fact that, compared with actual historical reality, they are relatively lacking in fullness of concrete content. To compensate for this disadvantage, sociological analysis can offer a greater precision of concepts. This precision is obtained by striving for the highest possible degree of adequacy on the level of meaning in accordance with the definition of that concept put forward.' (Weber, [1968] 2013a, 20) Hekman (1983) has offered a contrast: 'unlike historical ideal types, sociological types do not emphasize the uniqueness or peculiarity of the facts under investigation, and they are more selective; that is, they are a result of selection from a broader range of facts.' (Hekman, 1983, 42) While Hekman argues that the difference between historical and sociological types is one of degree, Burger (1976, 138) argues that it is a difference in kind; the former may be understood as 'individual' concepts (the idea is derived from Rickert), while ideal types are a special kind of general concepts. It is the fact that these are 'types' that account for their difference from ordinary 'general concepts'. The Weberian insight consists of the idea that social phenomena do not 'exhibit to equal

degrees the combination of characteristics which must be mentioned in the definitions of [general] concepts. This, of course is a result of the fact that the phenomena which are conceptualized are selected according to their cultural significance, and not because they exhibit the same constellation of parts which many other phenomena also exhibit.' (Burger, 1976, 156) Another way of expressing this is to say that the 'synthesized aspects of these concepts are not the common, but the significant elements of the phenomena under investigation.' (Hekman, 1983, 22f) This is argued to be the reason why Weber labelled them 'types' – the components on which their significance rests is not equally shared in all instances, but occur in different degrees in various cases – and 'ideal', in order to describe the relation between their conceptual character and the empirical referents (Burger, 1976, 156).[46]

The construction of ideal types has been argued by Schutz (1960, 220f) to be informed by a number of criteria, where two stand out: logical consistency and adequacy. Adequacy implies that the concepts employed by the social scientist should at some level be understandable and comprehensible to the actual individuals in the real world. Logical consistency, on the other hand, relates to the conceptual framework, warranting that concepts are logically related.[47] These two criteria set a limit to the level of abstraction of the concepts, which synthesise the ideal type; with reference to the meaning of social actors, and internally through logical consistency of the ideal features. In this connection, it has been argued that concepts should, to a certain extent, be historically specific, because if the aim 'is elucidation of the meaning of cultural reality, it follows that this elucidation will be facilitated by the use of concepts specific to the society under investigation, rather than by a fixed conceptual scheme which is applied alike to all societies.' (Hekman, 1983, 36) This brings us back to the discussion of the level of abstraction of concepts. Zaret (1980) has argued that there are limits to the abstracting process, where too high abstraction 'progressively effaces individuality and uniqueness and therefore overlooks the cultural significance of events' (Zaret, 1980, 1185); rigorous reduction prevents understanding by deleting those elements which are of interest. Still, concepts may be more or less abstract, and the process of concept formation may abide by certain procedures which retain historical anchorage and limit contextual range, thus determining an appropriate level of abstraction. Sartori (1993, 14) distinguishes ideal types from 'polar types' and 'empirical (extracted) types'; the latter seem to refer to types whose features have a lower level of abstraction and closer connections to their empirical referents.

In ideal type construction, the corresponding aspects may be understood as dimensions, and as noted, the relevant dimensions are derived from concept formation and assignment of cultural significance. Each dimension of relevant characteristics forms its own axis (cf. Bell, [1973] 1999, 10), along which a 'serial ordering' may be done with respect to each case. While it is then possible to relate each case along one single dimension, this is more

difficult to do along several dimensions in combination, because of the difficulty in clearly understanding the interrelations between these. Any synthesis into ideal conceptual frameworks should, in Hekman's view, be based on the meaningful and logical compatibility of concepts (Hekman, 1983, 60).

It may be said that there are two steps of abstraction, particularly in study 2. The first may be understood as a form of classification; the second as ordering along dimensions and abstraction of approximated ideal features of types. For the first level, concepts from educational theory are employed, for the second, concepts from historical sociology. There are then several 'layers' of analysis and abstraction in the studies, as well as discussion of concrete details that exhibit some of the case specific circumstances, which may also allow for the evaluation of the analysis and interpretation.

*Comparing cases*

The comparative method is important in these studies of the organisation of programmes and institutions of vocational education and training. The cases are compared, for various reasons, with various aims – a few central problems will be discussed in the following.

The comparative approach in the studies serves to primarily identify differences and similarities between the selected systems in the different nation-state contexts. Both the systems may be understood as 'cases', as well as the nation-state contexts, seen as 'wider cases'. For the systems, these are primarily, and most notably in study 2, understood as cases of types, and the comparisons seek to develop an understanding of how the cases differ along various ideal type dimensions. Using this approach, characteristics of systems can be located along dimensions and their differences and similarities revealed. Comparison here both assimilates and differentiates (Sartori, [1991] 2009, 246), and the approach is a way of developing the dimensions and conceptual features of ideal types. The cases included exhibit two different types of vocational education and training systems: school-based and apprenticeship-based. Studying and comparing a few cases with a case-oriented approach implies that these are held visible (cf. Shalev, 2007, 264) and that the systems and institutions studied in each case are analysed at a higher level of detail and with reference to a context that is more specific to the case. The notion of a 'case' may here be understood in a minimal sense: 'social phenomen[on] specific to time and place.' (Ragin, 1992, 2)

But the choice of cases is also founded on the idea that the wider cases – the nation-states understood as context (Kohn, 1987, 714) – are fairly similar on a number of important characteristics, which influence certain aspects of vocational education and training. This similarity on a number of characteristics – on which more below – qualifies cases as 'comparable', among which a variety of vocational education and training systems are then com-

pared with respect to difference and similarity (cf. Lijphart, 1971, 687). It has been argued that questions of 'comparability' are always dependent on the specification of the properties or characteristics of interests of the objects compared (Sartori, [1991] 2009, 246). 'Comparability' has also been discussed as 'equivalence'. It appears that there are a number of meanings of this term, but often it is argued that two phenomena are equivalent if they have 'the same value, importance, use, function, or result' (van Deth, 2013, 4f). Rather than identity, the meaning points to similarity, and here, it is also important to restrict similarity to a few properties of the phenomena compared.[48]

A common form of equivalence is what is called 'functional equivalence':[49] social phenomena are equivalent if they have the same or similar 'relations' to other social phenomena.[50] Another view establishes functional equivalence by focusing on the purposes of the objects of analysis. However, in order to understand the notion of equivalence in relation to conceptual elaboration, it may be fruitful to re-connect this methodological discussion to the construction of ideal types. This is also a possible point where the methods of comparative law may benefit from sociological insights. Comparison in some approaches within comparative law demands the identification of a *tertium comparationis* (Zweigert and Kötz, 1987, 42), which may be translated as a 'point of comparison'. Such a 'point' is a concept or statement containing concepts, with denotative reach wherein cases are included. Establishing *tertium comparationis* in comparative law implies that it is related to the 'function', which compared legislation relates to, often some form of 'problem' (Zweigert and Kötz, 1987, 31), and the comparative process must then work with concepts more abstract than the ones found in each system of legislation. Bell's ([1973] 1999, 10ff) 'axes' may be understood as points of comparison, and since a conceptual schema may contain several axes along which comparisons are made, research questions asked may conduct comparative inquiries along several dimensions – in fact, the various dimensions of ideal types may be understood as several points of comparison; the inference to 'ideal' features reaching adequacy when meaning is related to the most abstract concepts put forward. Zweigert and Kötz (1987) approach appears to be, what can be called, 'teleological' (Strömholm, 1988, 83), and in some ways (although this approach has weaknesses), this may be compatible with the method of conceptual elaboration, as the latter commences by stating value references, normative values attached to institutions, i.e. 'purposes'.

Stenhouse (1979) has offered some lucid comments on the meaning of case studies in comparative education, where '[t]he method is the comparison of case with case' (Stenhouse, 1979, 10), whereby light is thrown on one case by the other case. This may be interpreted to imply that a *tertium comparationis* must be established in order to find points with reference to which cases are compared, and contrasted, because comparison entails the search

for both similarities and differences. In Stenhouse's view, however, the general forms the background, which throws 'the individual into clear relief' (Stenhouse, 1979, 5). Insight is, here, the basis for understanding. It is plausible that Stenhouse's 'general principles' may be understood as the points of comparison against which more detailed qualitative studies may be coordinated – and these should be based on relevant concepts at an appropriate level of abstraction.

In some approaches, it has been argued that fruitful comparisons need more fine-tuned and precise definitions of both the analytical level and focus of comparisons (cf. Bynner and Chisholm, 1998). Bray and Thomas (1995, 479) have pointed out that the level of centralisation at the national level of an education system may vary widely, which thereby influences the extent to which it is possible to assume within-unit (nation-state) homogeneity. One way of more precisely pin-pointing what is being compared across education systems is to specify the dimensions and sub-categories that characterise educational systems, as, for example, in Bray and Thomas' (1995, 475) framework.

The wider cases, which form the context of vocational education and training systems are often discussed with respect to which aspects are relevant to take into account. The argument that such case-specific contexts make comparisons more difficult may be nuanced, but also exaggerated. Grant (2000, 312) has argued that the parts of education systems are interdependent, and must be seen in relation to the whole system – the same official terminology does not mean that these have the same function. In some lines of such arguments, the context and embeddedness of institutions are argued to be interrelated to the degree that it is not possible to isolate objects of analysis for comparison across cases (for a discussion of such arguments, see Grollmann, 2008, 253). In particular, what has been argued to be a specific relevant context for vocational education and training is that these institutions exist at the interface between education system and the economy; thus, the relevant context is predominantly also economic (Lehmann (1989, 751).[51]

An important argument in the three comparative studies of vocational education and training is that the phenomena studied – primarily the formal regulation of educational programmes – carry a particular ontological status, which diminishes some of these epistemological concerns. Since these are norms that are backed up by sanctions, they may be assumed to be more stable and durable, and it can thereby be argued that such phenomena retain a higher level of within-unit (within the jurisdictional case) homogeneity and temporal stability. But, as will be further discussed below, this ontological stability may lead to a less valid criterion for establishing equivalence.

*Limitations*

A few of the limitations of the three studies are discussed in the following, some of which relate to the problems raised above.

One problem and limitation in these studies has been the accurate identification of, what Zweigert and Kötz (1987) call 'function' – the object of analysis that is supposed to be 'functionally equivalent'. This problem is primarily visible with respect to the differences between programmes that are apprenticeship-based and those that are primarily school-based. It may be argued that in order to encircle a comprehensive 'function', apprenticeship training organised by the social partners through collective agreements, but also other forms of apprenticeships, should also be included in the comparison. Instead, only what has been codified in law under the legal framework for what are understood to be upper secondary vocational education and training programmes, have been included in the analysis; thus, a focus on certain kinds of legislation has bounded the choice of object of analysis. However, this very consideration may illuminate important differences and similarities in the compared cases, and thereby contribute to a deeper and more nuanced understanding of ways of organising institutions of vocational education and training. By shifting the definition of 'function' and thereby illuminating new points of equivalence, comparisons may be enhanced. Another possibility in the context of study 2 would have been to include certain programmes at higher levels of education with similar titles or certificates within certain occupational fields in some of the cases, thereby basing equivalence on occupational specialisation, rather than educational level. The particular interpretation of function has rather been to understand it in relation to the explicit aims of regulated programmes at, roughly, the same level of education – interpreting 'function' as meaning the purpose or aim of programmes within the education system. Nevertheless, it may be argued that the 'function' is also guided by the search for what is regulated with a certain strength and level of jurisdiction. Case selection may also depend on considerations of the constitutional form of government within the countries studied, a relevant point that is raised in contributions to methodology in comparative law: legal documents may be more or less interrelated and all relevant documents should be included in the interpretation of the empirical material. But this may, if understood too superficially, include all kinds of legal regulations, and the approach in these studies has rather been to restrict the material to the systems of education studied.

But another important set of parameters which may allow for more nuanced assessments of equivalence of the objects of study are the wider conditions wherein curricula are formulated, developed and implemented. Crude parameters for this condition have been argued to be the existence of enduring civil rights and liberties. This is an interesting problem that has been dealt with in these studies, and a discussion may illuminate some of the limi-

tations. It essentially relates to conceptualising phenomena that carry terms associated with epistemology. This seems to – in much on the empirical research literature on vocational education and training – to be a largely unacknowledged problem. But it can be argued that using terms such as 'knowledge', without any considerations of epistemological issues, is fairly hollow. The studies therefore use citation marks whenever such epistemological terms are used, and much of the conceptual focus has rather sought to shift the attention to more organisational and associated terms such as 'subject matter'.[52] Some of the conceptual and empirical work in these studies may even partly be understood as a result of the awareness of these problems, and a proposal of fruitful ways of dealing (or rather translating them into a problem related to case-selection) with them. But since vocational education and training contain much that is related to work of various kinds, there is a practical element involved – the vocational content of subject matter or of training seems to depend on the extent and kinds of institutional arrangements that exist on the labour market and various interest organisations. Here as well, care must be taken in choosing and defining concepts according to reasonable criteria. Study 1 conducts a cursory delineation based on choices of vocational specialisation and extent of training. Study 2 adds hierarchies of learning aims to this. Study 3 employs a fields classification that seems to have certain properties that exhibit fecundity and are useful in actual classification, but which can also be criticised in several respects. The important point is that sociological and institutional studies as these instead direct focus on the formal institutional organisation of learning, teaching and training, and exhibit the constellation of interests involved in these arrangements, while at the same time offering proxies – notably associated with liberal democracy, and civil and political rights – for the assumption that the content of education is developed under circumstances where its epistemological basis is an inherent concern.

A further question might be raised when it comes to assessing the degree of uncertainty of the conceptual elaboration that is part of the reconstruction of concepts, which is based on the empirical results. The interpretation of features of these programmes and systems is based on the conceptual framework developed, and where several alternative interpretations seem reasonable, arguments are presented for them, often with further uncertainties indicated, and judgments motivated for finding one interpretation more valid than another.

# Notes

1 The original year of publication for this edition in English is 1968, however the first edition of Weber's *Economy and Society* in German seems to be from 1920.

2 Merton (1995, 28f, footnote 54) has noted that Weber's '*Lebenchansen*' has been translated also, not as 'life chances', but as 'struggle for advantages'. Merton's 'opportunity structure' seems to resemble the notion. Dahrendorf (1979, 63) has pointed out that some translations also render the term in interpretative ways, often as 'probability'.

3 And in its Swedish translation associated with living standard, and social and economic security (Svensk Ordbok).

4 It should be noted that Marshall has been criticised for his historical periodisation, on various points; for basing his conceptual account solely on the British historical experience; for not highlighting enough political struggle as a source of the establishment of rights (Rees, 1996); and for not considering enough what may be termed the 'conditions for possession' of rights – specifying who has or can have the right (Martin and Nickel, 1980, 173).

5 The usage of the term 'citizenship' in this context may be understood through a sociological perspective. It is not primarily concerned with the formal requirements for obtaining the legal status of citizen in a nation-state (Rees, 1996, 17), but rather theorizes on the content, meaning, as well as the historical progression of the various rights that make up full membership in a social unit; here, the nation-state. The distinction between the two meanings may be termed 'vertical' and 'horizontal' (Dahrendorf, 2008, 30). Furthermore, it may be noted that while entitlements are at the core of the idea of citizenship, duties are also present and relevant – however, the two must be detached; otherwise, the notion of rights loses one of its core meanings – their un-conditionality (Dahrendorf, 1994, 13).

6 One importance of fundamental rights is that they often 'act as constraints on collective goals' (Davies and Holdcroft, 1980, 230), or that they may be perceived as 'requirements with great importance – overriding the public good or utilitarian considerations' (Harel, 2005, 191).

7 As, for example, listed in the UNDHR. Although this list is long, there are strong arguments supporting the view that the core of human rights encircles the rights related to personal security, integrity and (negative) freedom.

8 Donnelly (2003, 30) has highlighted several contradictions between the delineation of rights as negative or positive.

9 It has been suggested that the term 'social state' may be preferable to 'welfare state' in order to avoid the paternalistic connotations of the latter term (Dahrendorf, 1985, 94).

10 Erikson ([1993] 2003) has noted that there seems to be a similarity between the command-over-resources approach with Sen's (1992) 'capability' approach. The requisite concept of 'capabilities' – 'functionings' – is however not present, which can be criticised on several points. Furthermore, 'capability' as a concept appears to have such wide contextual range – spanning from being well-nourished to taking part in a community (Sen, 1992, 5) – as to almost appear to lack connotative distinguishing features. It has also been pointed out that it seems to express ideas of positive freedom (in some of Berlin's ([1958] 1997) senses; notably those with a focus on forms of autonomy), and if considered the object of equalisation through state policy, a justification for state coercion.

11 My translation.

12 The conflation of meaning may be a result of the inclusion of the variety of different meanings of 'resource' – from supply, to ability, to means, to capital or assets (Webster). But some of these are widely different phenomena. Bourdieu's (1986) forms of capital – in some ways a similar concept, which also seem to encompass a range from subjective states to external objects – differentiate between forms, but may similarly be criticised for exhibiting low resonance by employing a term ('capital') which is primarily associated with material wealth.

13 This may, if discussed in relation to distributional issues, have an impact on how policy domains are conceived; in the latter case, they are dispersed to include a variety of 'condi-

tions', and may blur both the distinctions between negative and positive freedom, as well as private and public domains. This is plausibly visible in the use of 'levels' of living rather than 'standards' of living.

[14] It would appear that here Esping-Andersen's approach is close to one of Weber's definitions of rights – 'appropriated chances' (in Dahrendorf's (1979, 66) translation; or 'advantages' (Weber, [1968] 2013a, 44)) – in his discussion of the processes of closure by social groups. If social rights are firmly based upon citizen status, this would be the case. It is, furthermore, highly doubtful that social rights could ever attain the status of property rights in a free society.

[15] Eligibility to social rights does not necessarily have to rely on citizenship status.

[16] As in the discussion above, the rights-aspects of education are considered not in relation to conditions for possession, but rather in relation to what it is, and how, that is actually guaranteed in the teaching and learning process of educational programmes.

[17] The systems are largely publicly financed.

[18] I will not venture into the extensive discussions, in many aspects philosophical in nature, on the meaning of 'merit', a notion often present in various interpretations of 'equality of opportunity'. Interesting contributions and a range of views engaging in similar questions and issues may be found among those mentioned in footnote 26. But an implicit view in these studies is that notions of merit should be seen in context, tied to particular circumstances and activities. In these cases, such circumstances may be the syllabus of a course, or the work tasks stated in an employment contract. This lies fairly close to what I interpret to be Bell's ([1973] 1999, 424ff) views, which are, however, not as clearly formulated and spelled out.

[19] The question of the extent to which conditions of possession is based on formal citizenship is not addressed in these studies.

[20] The use of the term 'system' refers to coherent legislation and regulation, and in these cases on the national level. In many countries, curricular regulation occurs at lower jurisdictional levels.

[21] Often, both public and private elements are involved in the provision of education within distinct systems (understood as jurisdictionally bounded).

[22] For a historical overview of the aspects of state policy that vocational education and training has been considered to be part of in Sweden, see Nilsson (1981). For the main tensions in policy formulation and perspective historically, as regards the education system in Sweden, see Lindensjö and Lundgren (2000). For the aspects of vocational education and training that have been discussed in relation to or as part of social policy, particularly in the Swedish context, see Elmér et al. (2000, 57f).

[23] This is a minimal definition – material resources of various kinds may be distributed in various ways over this temporal dimension. This is, however, not studied; but it can, of course, be a fruitful line of inquiry in further research.

[24] The only measure of distribution is time, not the actual amount of resources – if resources are understood as financial. But it is plausible that this may serve as an indirect measure.

[25] O'Neill (1976) may be criticized for using the term 'public' too widely, as well as for not making further important distinctions within the domain related to policy and institutions. Note also that there is a problem in using the term 'opportunity' as in 'educational opportunity', particularly if opportunity is understood to be a temporally limited circumstance, similar to 'chance' (Campbell, 1975).

[26] The interpretation of mobility studies, usually including associations of social class background and attainment defined and measured in some particular way, as operationalisations, however vague, of 'equality' or 'inequality of opportunity' may be criticised on many points – for a discussion on a range of issues, see Swift (2004); of which the most important are the inadequate understanding of different meanings of 'chance'; weak normative reasoning on the implications with respect to parental upbringing and education, and a lack of clarity as regards the interpretation and implications of 'perfect' mobility. In relation to these arguments, O'Neill's (1976) distinctions (which may be developed further) between choice and chance, public and private domains, and various interpretations of equality of opportunity, should also

be considered. For a lucid discussion on similar issues and points of contention in the interpretation of mobility within or in relation to education systems as equality or inequality of opportunity – for example, the weaker the association between social class background and educational attainment, the closer the ideal of equal educational opportunity is expressed, as formulated in Jonsson (1996, 113) – the following arguments seem to be relevant, particularly for the more philosophical interpretation of such formulations. On a general level, there is a problem in interpreting a normative principle related to policy as being formulated upon abstract categories, which are partly artificial and arbitrary constructs – and such approaches lie in tension with the central civil right: that all persons are equal before the law. Bell (1973, 424ff) has, among other points, argued that similar formulations do not express equality of opportunity, but equality of outcomes, and that the focus is not on individuals as persons, but on individuals reduced to group (however defined) attributes. Swift's (2004) arguments (see above) are also pertinent here. Lindensjö and Lundgren (2000, 120f) argue that a focus on equalising 'background' (usually 'family') undermines and comes in conflict with values such as family autonomy and individual freedom. For the range of various philosophical interpretations of 'equality of opportunity' in the educational context, see Gutmann (1999, 128ff); the most interesting arguments exhibit the implications of and conflicts between various normative principles. If the focus on mobility in the educational context is interpreted as an aim related to 'social efficiency' (Elmore and Sykes, 1992, 193) or 'societal reproduction' (Lindensjö and Lindgren, 2000, 13), these have been argued to lie in conflict with aims related to teaching the 'knowledge' content of curricula.

[27] This is more complicated when it comes to compulsory education. All the programmes studied here are post-compulsory as of 2013 and 2014, the point in time when the empirical material was gathered.

[28] Which may also imply that there are tensions between both types of rights and the normative principle.

[29] It should be noted that this brief treatment, as the related one above, does not focus on the 'conditions for possession' of rights, and thus does not discuss important limitations, restrictions and asymmetries in their historical development. The aim is, however, not to provide a comprehensive view, but rather to identify the 'centrality' (on which more below) which these conceptual frameworks illuminate, partly by establishing reference points which strengthen historical anchorage. Discussions of 'equality of opportunity' tend to neglect historical experience and so, often, provide interpretations which contradict earlier perspectives (see also footnote 26).

[30] Ascription in the sense of 'legal status'.

[31] A general critique towards the use of the term 'transition' in this context is that the expression rather downplays the negotiation aspect in the market situation, as well as the purposive action of employers on the labour market.

[32] It may be argued that these studies seek to highlight that the 'intersection' is not merely between education and the labour market or economy, but that there is yet another axis or point of centrality (to use Bell's ([1973] 1999) terms) that may be considered or taken into account, at least at this level of education: that of general learning, basic values, or all-round general knowledge.

[33] Such an explanatory emphasis accepts and relates both 'to the use of reason in the conduct of human affairs and also to the notion of moral responsibility' (Doyal and Harris, 1986, 69).

[34] It may here be pointed out that even when we are studying laws, as in the legal regulation of educational programmes, we can still only derive the probability of behavior in accordance with them. This is one reason why and sense in which Weber used the notion of 'chance' (Dahrendorf, 1979, 63f). In the context of study 2, it may be said that we can expect there to be a higher probability that teaching and learning will occur in guaranteed parts of programmes, than the probability that opportunities will arise and be seized. In the latter case, voluntary choice is constitutive of the situation. Nevertheless, in both instances, we are dealing with probabilities.

[35] UNESCO (2012, 13f) has, for example, long argued that direct comparisons of curricula are too difficult because of complexities of various kinds, thereby making identification of equivalence elusive, and the ISCED framework has not attempted more than cursory delineation of the main distinguishing orientations – this is also, roughly, the approach in these studies, yet some other dimensions are added, as well as auxiliary detail, through the case study approach.

[36] The regulation of the curriculum, or aspects or parts of its content, varies in countries, both in extent and with regard to jurisdictional level. Elmore and Sykes (1992) discuss strands of research which study various aspects of curriculum policy – for example, extent and level of jurisdictional authority, the boundaries which legitimise policy domains, the variety of sources of institutional control, the connection between policies and policy communities, the contradictory and conflicting demands of various policy objectives associated with the education system as well as the curriculum. Of particular note, relating to the last conflictual dimensions of curriculum policy, Lindensjö and Lundgren (2000, 17) have pointed out that, in the Swedish context, there has historically been two main, often opposing views on educational policy, in part related to the curriculum – one more oriented towards wider 'societal' or economic aims and ends, and one more oriented towards preserving the more traditional aspects associated with learning. The forms and extent of state control over curricula is generally an important point of contention – this has also been studied with respect to level of jurisdiction (societal, institutional, instructional, ideological) (Goodlad and Su, 1992, 328); the extent of conflict and contestation between various interests in curriculum decision-making, or the extent of syllabi specification, or testing (Apple, 2008); or the control of standards and the curriculum between public (and political) and professional control (Westbury, 2008, 48).

[37] Habermas uses the term (translated) 'value relation', which 'applies primarily not to the selection of scientific problems but to the constitution of possible objects of the experience that is relevant to inquiry in the cultural sciences' (Habermas, [1970] 1988, 14). For Weber, both the selection of problem and the choice of theoretical framework are related to value relations in a historical context (Habermas, [1970] 1988, 15). It is in this way that a central value reference or relation as 'equality of opportunity' interpreted as a central normative feature of citizenship rights is related to selection procedures of historically specific case. It can be argued that the value reference is a form of ideal type; in the process of conceptual elaboration, it attains distinctive qualities and is exemplified through the particular cases.

[38] Originally published 1904.

[39] For Aron, not to ask fundamental questions related to values and the means and ends of policy, 'is really to ask them in a specific way. In sociology as in philosophy, not to philosophize is really to do so' (Aron, 1961, 24).

[40] See also Eidlin (2011).

[41] It should be pointed out that 'long before having data which can speak for themselves, the fundamental articulation of language and of thinking is obtained logically – by cumulative conceptual refinement and chains of coordinated definitions – not by measurement'. (Sartori, 1970, 1037f) Conceptualisation rests on interpretation of natural languages; '[t]he bulk of our knowledge of ourselves is expressed in a natural language – not in a formal, formalized, or uninterpreted language' (Sartori, [1984] 2009, 97) and the essential feature of theorising consists of 'the clarification of concepts' (Merton, 1968, 168), a preliminary step in any empirical analysis.

[42] According to Blumer (1954, 9), sensitizing concepts are best illuminated by ways of exposition in order to provide a meaningful picture, supplied with illustrations, and less by ways of formal definitions.

[43] See Marshall ([1975] 1979) for how such boundaries have shifted historically.

[44] Not to be confused with Sartori's ([1984] 2009) use of this term.

[45] Aron (1961, 27) argues that this limited and partial view of social phenomena, which ideal types imply pertains to their scientific status; in contradistinction to and in as much as theories 'claim to present an exact, authentic and universally valid reproduction of social structures they cease to be scientific', in part because these then impose on social reality 'a simplified structure which it does not possess'.

[46] Note that 'ideal' does not relate to anything desirable, but rather stresses that features are attenuated or exaggerated (Burger, 1976, 154).

[47] Sartori's ([1984] 2009) various criteria for concept analysis are here pertinent, yet it may be questioned whether the properties of the 'ladder of abstraction' are as straightforward when applied to ideal type construction, not the least since because of the difference between general concepts and type concepts.

[48] van Deth (2013, 7) also endorses auxiliary knowledge, i.e. case-based knowledge, for those who wish to establish equivalence. This is one of the important arguments for in-depth understanding of the case and its context.

[49] Using the term "function" has certain connotations in sociology, such as to theories of functionalist bent, often with dubious teleological assumptions and implications.

[50] 'Functional equivalence' of educational qualifications seems to have, in other contexts, been understood as an issue related to problems of, essentially, measurement (see for example, Schneider (2009, 78)). Dalichow (1992) offers a number of different views on equivalence when it comes to higher education institutions and qualifications.

[51] For a wide review of various approaches and issues in comparative education, see Mason and Evers (2010).

[52] The epistemological problem associated with concepts, which encircle epistemological claims, tends to be neglected in many problems dealt with within the sociology of education.

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# Summary of the three studies

The three studies conduct sociological, comparative and institutional analyses of a number of countries' public vocational education and training systems at upper secondary level and post-secondary level of education. The empirical focus is on educational programmes in the public vocational education and training systems at upper secondary level in Denmark, Finland, Norway and Sweden, and the public higher vocational education systems in Denmark and Sweden. Public regulation of programmes and curricula at the level of the nation-state is interpreted for most of the cases, and focus is directed at features, which distinguish between general, academic and vocational aspects of teaching, learning and training. The analytical framework employs concepts derived primarily from historical and institutional sociology, and educational studies, and the aims are conceptual elaboration, and the construction of dimensions of ideal types. All three studies have a comparative approach, where comparisons serve to illuminate similarities and differences between cases, by focusing on equivalent features of programmes and institutions.

## Study I

Study 1 is a comparative analysis of upper secondary vocational education and training programmes in Denmark, Finland, Norway and Sweden. The analytical focus is directed primarily on the selection, scope and sequence of curricular units of subject matter with general and vocational orientation as well as periods of training. The organisation of programmes with respect to these features may provide vocational education qualifications and/or eligibility for higher education studies – this is a possibility in all four cases. In the apprenticeship-based programmes in Denmark and Norway, additional subject matter must be studied which prolongs or changes the duration of the programme, in order to obtain higher education eligibility, while in the school-based programmes in Sweden and Finland, only a few or no additional subjects need to be studied to include such eligibility in the vocational education qualification. Overall, in all programmes across the cases, the possible choices encompass both higher education eligibility as well as apprenticeship alternatives, and these imply different combinations of curricular units making up the study programme. One interesting finding is that

particular combinations of general and vocational curricular units, may, through the addition of a few courses, contribute to emerging aims of curricula.


*Study II*

Study 2 compares three vocational education and training systems at upper secondary level – in Denmark, Norway and Sweden – in part with regard to how programmes are constructed and designed with respect to rights-based and contract-based features, and vocational and general elements. A method is developed, including three-dimensional depiction of programmes, partly in order to more accurately identify points of equivalence when comparing cases and elaborating on features of ideal types. Some of the results indicate that the resources necessary for attaining the full, intended educational qualification are not guaranteed in any of the three cases; however, this applies particularly to apprenticeship-based programmes, where it can be obtained only after training contracts with status-like features, resembling parts of occupational 'jurisdictions', are seized within sheltered circumstances. In the school-based programmes, a larger proportion of resources for learning are guaranteed, but training is shorter and less vocationally oriented. Vocational education and training programmes in all three systems orient learning not only towards vocational, but also general learning aims. Study 2 is, in part, an elaboration, further exploration and critique of some of the problems, questions and approaches posed in study 1. The three-dimensional method developed for understanding the relation between learning aims, subject matter and training, allows for more accurate identification and assessment of equivalence, as well as illuminates the complex relations between various learning aims over different sequences of time. It also highlights, among other things, some peculiarities with the apprenticeship-based programmes, where the detailed regulation of learning aims associated with training periods in companies may be understood as a form of institutionalisation of parts of occupational 'jurisdictions', posing further questions about whether such organisation of curricula may allow external actors to advance jurisdictional claims. The study also highlights the intricate relations between the guaranteed entitlement-like features, and those that are offered as opportunities, of various programmes, thereby illuminating the complex steps that exist between education, training and employment. Certain clear differences may be discerned between the cases. From a wider sociological perspective, these may be understood as empirical explorations of the relations between institutions and markets – as well as to other realms – primarily from the point of view of individuals' life chances.

*Study III*

Study 3 is a comparative study of publicly regulated upper secondary and post-secondary higher vocational education and training systems in Denmark and Sweden. The Danish 'erhvervsakademi' and the Swedish 'yrkeshögskola' are in focus, and the relations to the vocational education and training systems at the educational level below are examined in order to discern how the entitlement to and provision of further education is institutionally designed and organised for upper secondary vocational education qualification-holders. The two systems at post-secondary level are different in many important respects, and some of these institutional differences seem to be related to how vocational education and training are organised in the public systems at the educational level below. The study classifies the range of programmes on offer by educational field at both levels of education, and conducts cluster analyses of unique paths between levels of education – classified according to admission criteria – in order to discern variations in options between the two levels of education. One important finding is that the entitlements to apply to programmes at post-secondary level are wider in scope across educational fields in the Swedish than in the Danish system, where in the latter, options are more narrow but clearly defined. At post-secondary level, the Swedish system is, furthermore, designed primarily upon course-based admission criteria, while the Danish system rests on qualification-based admission criteria. The various options open to individuals as combinations of entitlements to apply to various provision of education at post-secondary level are understood as elements of their life chances.

# Sammanfattning

Denna avhandling består av en introduktion och tre studier, som med sociologiska, jämförande och institutionella ansatser analyserar och tolkar ett antal länders offentligt reglerade yrkesutbildningssystem och program på gymnasial och eftergymnasial nivå. Empiriskt fokus är riktat mot främst utbildningsprogram i yrkesutbildningssystemen på gymnasial nivå i Danmark, Finland, Norge och Sverige, och eftergymnasiala yrkesutbildningar i Danmark och Sverige. Offentlig reglering av program och läroplaner på (national-)statlig nivå analyseras och tolkas med fokus på innehåll som framför allt skiljer på allmänna och yrkesorienterande aspekter av undervisning, lärande och praktik. Den analytiska begreppsapparaten använder sig av begrepp utvecklade inom historisk och institutionell sociologi, och pedagogik. Ett viktigt syfte är begreppsbildning, till viss del ett led i utvecklingen och konstruktionen av idealtyper av yrkesutbildningsprogram och system. Alla tre studier använder sig av en jämförande ansats, som belyser skillnader såväl som likheter mellan de studerade fallen genom att utveckla och skärpa identifieringen av jämförbara aspekter av program och institutioner.

*Studie I*

Studie 1 genomför en jämförande analys av yrkesutbildningsprogram i Danmark, Finland, Norge och Sverige. Analytiskt fokus är riktat mot främst urval, omfattning och ordningsföljd av allmänna och yrkesorienterande ämnesområden, och perioder av praktik, inom programmen. Organiseringen av sådana element inom ett utbildningsprogram kan på olika sätt och i olika kombinationer erbjuda antingen eller både behörighet till högre utbildning och yrkesexamen – detta är en möjlighet i alla fyra systemen. I de danska och norska lärlingsprogrammen behöver man läsa ytterligare ämnen av akademisk karaktär, som därmed förlänger programmens längd, för att uppnå högskolebehörighet, medan endast få kurser behöver läsas för att uppnå högskolebehörighet i de svenska, och inga i de finska programmen. I alla fyra systemen finns valmöjligheter till att genomgå lärlingsutbildning, beroende på konstruktionen av läroplanens ämnesdelar och organiseringen av praktik. Åtskillnaden mellan allmänna och yrkesorienterande ämnen är mer distinkt i lärlingsbaserade program, förmodligen beroende på de längre praktikperioderna. En intressant aspekt av programmen tycks vara att vissa sätt att

kombinera allmänna och yrkesorienterande ämnen kan bidra till att nya lärandemål uppstår.

*Studie II*

Studie 2 består av en jämförande studie av tre offentligt reglerade yrkesutbildningssystem på gymnasial nivå – i Danmark, Norge och Sverige – med avseende på hur programmens konstruktion kan förstås i relation till bland annat rättighets- och kontraktsbaserade element, och generella och yrkesorienterande aspekter. I studien utvecklas en metod, som inbegriper tredimensionell visualisering av programelement, delvis för att erbjuda mer precisa verktyg för att identifiera jämförbara aspekter i de olika fallen och utveckla idealtypiska egenskaper. Några av resultaten indikerar att resurser för att uppnå fullständig, ämnad examen inte går att säkra fullt ut i något av de studerade fallen, men detta gäller särskilt lärlingsprogrammen, där en fullständig examen uppnås endast efter att träningskontrakt med statusliknande egenskaper har ingåtts inom skyddade institutionella sammanhang. I skolbaserade program är en större andel resurser garanterade, men praktiken är kortare och har en svagare yrkesorientering. Yrkesutbildningsprogrammen i alla tre systemen orienterar undervisning, lärande och praktik mot såväl yrkesmässiga, som allmänna lärandemål. Studie 2 är delvis också en vidareutveckling, fördjupning och kritik av några av de frågor, problem och ansatser som utvecklas i studie 1. Den tredimensionella metod som utvecklas för att förstå relationen mellan olika lärandemål, ämnesinnehåll och praktik, förbättrar möjligheterna till jämförelser, och åskådliggör komplexiteten i relationen mellan olika lärandemål utsträckta över tid. Den synliggör också tydligare några av egenheterna inom lärlingsprogrammen; nämligen förekomsten av detaljerad reglering av lärandemål förknippade med praktikperioder på arbetsplatser, som kan förstås som en form av institutionalisering av delar av yrkesjurisdiktioner. Detta föranleder, bland annat, vidare frågor om i vilken mån sådana program erbjuder möjligheter för utomstående aktörer, som är inblandade i utformandet av läroplaner, att reglera ingångarna till arbetsmarknaden, och utforma utbildningsinnehållet svarande mot sina egna intressen. Studien belyser också den komplexa relation som finns mellan de delar av programmen som kan förstås som en rättighet, eftersom de är garanterade, och de som endast är möjligheter, vilket åskådliggör de många steg som existerar – varierandes mellan systemen – mellan utbildning, praktik och efterföljande anställning. Ett antal tydliga skillnader går att urskilja mellan de studerade fallen. Ur ett bredare sociologiskt perspektiv belyser fallen hur relationen mellan institutioner och marknader – och även andra aspekter – ter sig i en yrkesutbildningskontext, sett från individers livschansperspektiv.

*Studie III*

Studie 3 består av en jämförelse av yrkesutbildningar på gymnasial och eftergymnasial nivå i Danmark och Sverige. Dansk *erhvervsakademi* och svensk *yrkeshögskola* står i fokus och de institutionella relationerna till den gymnasiala utbildningen åskådliggörs i termer av dessa systems behörighetskriterier för ansökan till olika typer av tillhandahållande av utbildningsprogram. De två eftergymnasiala utbildningssystemen skiljer sig åt i många avseenden, varav några av dessa skillnader tycks vara förknippade med skillnaderna på den gymnasiala nivån. Studien klassificerar alla program i systemen enligt utbildningsområde och genomför klusteranalyser av unika institutionella 'vägar' mellan utbildningsnivåerna – kategoriserade enligt behörighetskriterier – för att urskilja variationen i hur möjligheter till vidareutbildning uttrycks i de två fallen. Generellt tycks behörighet att söka till eftergymnasial utbildning vara bredare enligt utbildningsområde i den svenska yrkeshögskolan, som till stor del är konstruerad enligt ämnesbaserade behörighetskriterier. I den danska *erhvervsakademi*, där behörigheten är konstruerad enligt examensbaserade kriterier, är möjligheterna i sin tur är smalare, men mer tydligt definierade. De möjligheter individer med gymnasial yrkesexamen har, som kombinationer av berättigande (behörigheten) att ansöka till olika typer av tillhandahållande av yrkesutbildning på eftergymnasial nivå, kan förstås som aspekter av deras livschanser.