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Private actors in preschools and schools

A mapping of independent education providers and owners in Sweden

Skolverket
Swedish National Agency for Education

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Foreword

This report updates the Swedish National Agency for Education's earlier report *Enskilda huvudmän och skolmarknadens ägarstrukturer* (Independent education providers and ownership structures in the school market). It describes the changes that have taken place since 2009 in terms of the number of independent education providers and owners in compulsory schools and upper secondary schools. New in this report is a mapping of private actors in preschools in 2013. The report is based on statistics from registers and is presented at national level.

In order to assess the consequences of the right to choose school on quality, equivalence and diversity in the education system, there is a need for a regular up-to-date and coherent picture of the actors in the school market. This report aims to provide such a picture using the latest available statistics.

The report has been produced by Henrik Bengtsson and Anneli Melén at the Swedish National Agency for Education. Valuable views on previous versions of the report have been submitted by the Inquiry on owner assessment and the Swedish Schools Inspectorate.

Stockholm, September 2014

Anna Ekström	*Henrik Bengtsson*
Director-General	Director of Education

Contents

Summary

How many private actors (independent education providers and owners of independent education providers) are there in preschools, compulsory schools and upper secondary schools? How many independent preschools and schools are there? Who are the actors and how do their activities differ? These are a few of the questions answered in this report through a national mapping based on the latest available statistics.

The results in the report point to great variation in Swedish independent preschools and schools, independent education providers and owners. For example, the education providers differ in size, forms of operation and ownership structures. While the private actors together contribute to providing a varied supply of preschools and schools, a few have taken increasing market shares from the small independent and municipal education providers.

There were just over 2,000 independent education providers, including many cooperatives, limited companies and non-profit organisations, in preschools in 2013. Approximately 2,500 preschools in Sweden are independent. In other words, most education providers only run one preschool. There are also education providers with many preschools, which means that one in ten independent preschools belongs to one of Sweden's ten biggest independent education providers.

In 2013, there were almost 600 independent education providers with approximately 130,000 pupils in compulsory schools. Of these pupils, two-thirds attend compulsory schools run by limited companies, though it is also common with foundations, cooperatives and non-profit associations. In 2013, there were more than 200 independent education providers running upper secondary schools with a total of 85,000 pupils. These pupils attend schools run by limited companies to a greater extent than in compulsory schools (85 per cent). Besides limited companies, independent upper secondary schools are primarily run by foundations.

More than one in three pupils in independent compulsory and upper secondary schools attends a school run by one of the ten biggest *education providers*. While this is the lowest proportion in upper secondary schools since 2009, it has continued to increase in compulsory schools since then. In upper secondary schools, the reduced space for many of the big actors is partly explained by the falling pupil population at national level and the growing competition for pupils. The compulsory school market is not yet as saturated, as witnessed by the rise in the proportion of pupils in schools run by limited companies outside the metropolitan and urban municipalities in Sweden. In

2013, there is still a higher concentration of pupils (just over half) for the ten biggest *owners* or groups in independent upper secondary schools than in compulsory schools (approximately a quarter).

The school market that emerged after the right to choose school and the school reforms of the 1990s transferred the power to choose school from the public authorities to the individual family. The market also created differences that challenge equivalence in Swedish schools. The Agency is monitoring the market adaptation of a school system that is changing fast and is difficult to take in. This report presents a national picture of the independent preschools and schools, and independent education providers and owners. It is hoped that the report will contribute greater knowledge about the actors on the school market and to a fact-based discussion on the consequences of the right to choose school on quality, equivalence and diversity.

CHAPTER 1

Introduction

Introduction

"Independent schools are here to stay"[1]

The right to establish independent schools has led to a diverse range of actors offering education programmes in the Swedish education system. The activities have different operational and ownership forms, and different sizes, educational programmes and methods.[2] This has increased the opportunities for parents and pupils to choose school. The right to choose school has meant that many municipal and independent schools compete with each other. The same has applied in preschools since 2006, when the right to establish a school was introduced for this type of school.[3]

The government maintains that diversity and competition in all essential matters will benefit the development of quality in schools.[4] Independent preschools and schools are a natural and important part of the Swedish education system.[5] The Agency also sees the right to choose school and the school market as a genuine dilemma that is highly likely to have contributed to the growing differences in pupils' results between schools. Even if the right to choose school contributes to schools reviewing their activities to improve quality, this choice can weaken the conditions for safeguarding every pupil's right to equivalent education.[6] The opportunity to choose is also not evenly distributed between municipalities and different parts of Sweden.[7]

There are also signs that the diversity of independent schools with different operational and ownership forms has decreased in recent years. In its report *Enskilda huvudmän* och *skolmarknadens ägarstrukturer* (Independent education providers and ownership structures in the school market), the Agency illustrated growing dominance by a few actors.[8] The growth in the number of both independent schools and pupils in them has been particularly strong for

1. Independent School Committee (SOU 2013:56), *Friskolorna i samhället*, p. 15.
2. See, for example, Swedish National Agency for Education (2012), *En bild av skolmarknaden. Syntes av Skolverkets skolmarknadsprojekt.*
3. The right of free establishment also existed during the non-Socialist parties' term of office between 1991 and 1994.
4. Govt. Bill 2008/09:171, *Offentliga bidrag på lika villkor*, p. 25.
5. Govt. Bill 2009/10:165, *Den nya skollagen*, p. 206.
6. Swedish National Agency for Education (2013), *Skolverkets lägesbedömning 2013*, pp. 7–8. See also OECD (2012), *Education Today* 2013.
7. Swedish National Agency for Education (2013), *Det svåra valet. Elevers val av utbildning på olika slags gymnasiemarknader.*
8. Swedish National Agency for Education (2012), *Enskilda huvudmän och skolmarknadens ägarstrukturer.* See also Swedish National Agency for Education (2011), *Skolverkets lägesbedömning 2011. Del 2 – Bedömningar och slutsatser.*

limited companies and large groups of companies that are active in the education system.

In recent years, there has been great debate in the media on profit-taking by the school companies, their purchases and sales of school activities, and the owners and venture capital companies that are often behind these companies. In the past year, the group JB Education AB (JB Gymnasiet), which went into liquidation in summer 2013, has attracted most attention. Occurrences such as this have raised questions and initiated government investigations into what kinds of education providers and owners are suited to running school activities and how this suitability should be assessed.[9]

In light of the above description, it is important for the Agency to continue to monitor the market adaptation of a school system that is "varied, rapidly changing and difficult to survey".[10] In order to assess the consequences of the right to choose school on quality, equivalence and diversity in the education system, a regular up-to-date and coherent picture is needed of the independent preschools and schools as well as the actors that run them.

First mapping of preschool actors

This report is based on the Agency's earlier study *Enskilda huvudmän* och *skolmarknadens ägarstrukturer* (Independent education providers and ownership structures in the school market). The aim is to update and improve the mapping of independent education providers and owners that were active in compulsory schools and upper secondary schools between 2009 and 2013. Another aim is to extend the mapping by including preschools with data for 2013. This is the first time that the Agency is conducting a mapping of this kind for preschools. The following overall questions will be answered in this report:

- How many independent actors are there in preschools, compulsory schools and upper secondary schools in 2013, and who are they?
- How extensive are the private actors' activities? How do they differ from each other and from the public actors?
- How have the number of private actors and the scope of their activities in compulsory schools and upper secondary schools changed between 2009 and 2013?

9. See, for example, Independent School Committee (SOU 2013:56), *Friskolorna i samhället*, Dir. 2012:131 *Ägarprövning och mångfald vid offentligt finansierade välfärdstjänster* and Dir. 2014:3 *Tilläggsdirektiv till Ägarprövningsutredningen.*
10. Swedish National Agency for Education (2012), *En bild av skolmarknaden. Syntes av Skolverkets skolmarknadsprojekt*, p. 11.

A statistical presentation

The report is based on statistical data from different registers. The Agency's statistics have been used as far as possible, including the annual registers of education providers, schools and pupils for compulsory schools and upper secondary schools. The Agency's statistics cannot be used for all parts of the report however. Data from company and group registers from Statistics Sweden and Upplysningscentralen (information centre for business and credit information and decision solutions, UC) have therefore also been used. Statistics from Statistics Sweden and UC have primarily been obtained in the following areas:

- independent education providers in preschools and independent preschools per independent education provider
- owners and group structures in preschools, compulsory schools and upper secondary schools

Delimitations and definitions

The report covers the school types preschool, compulsory school and upper secondary school.[11] The data for 2009, 2011 and 2013 refer to measurements for the month of October. In the Education Act (2010:800), preschools and schools as organisational units have been replaced with the terms *preschool unit* and *school unit*. In this report, however, the terms *preschool* and *school* are used instead of the terms in the Education Act.[12]

Preschool and school actors

In this report, *actors* refers to those that, privately or publicly, offer or influence, through their ownership, education in preschools, compulsory schools or upper secondary schools.[13] These actors are described in more detail below.

11. Here, compulsory schools also include the state Sami schools.
12. The Swedish National Agency for Education presents statistics per school unit (preschool unit) from the academic year 2012/13. The terms *school* and *school unit* are not comparable – the number of school units is higher than the number of schools as a direct result of the change in the definition. This applies primarily to public education providers that, compared with previously, have organised their activity in more and smaller school units.
13. In other words, other actors that affect the supply and demand for education, for example pupils and parents or schools and head teachers.

Independent and public education providers

Independent education provider refers to an independent physical or legal entity that operates education at an independent preschool or school.[14]
This could be, for example, an association, foundation or limited company.

Public education provider refers to a municipality that operates education at a municipal preschool or compulsory school, or a municipality, municipal association (upper secondary school association) or county council that runs education at a municipal upper secondary school. Public education providers also include the state, which is the education provider for Sami schools at compulsory school level.

Owners, holding companies and groups

This report maps the owners of the independent education providers in preschools, compulsory schools and upper secondary schools. In the report, the term owner refers to a company or organisation (parent company) that owns at least 50 per cent of the shares or votes in the education provider's activity (subsidiary).[15] Together, the parent company (owner) and the subsidiary (education provider) are part of one and the same group of companies, a so-called school group. Preschools and schools that belong to a group are known as company preschools and company schools respectively.

Owner refers only to the Swedish parent company, i.e. the parent company of the whole group. Many of the big groups have foreign owner interests, but it has not been possible to follow the ownership structures in foreign group registers here. Any Swedish or foreign private persons who own assets in the Swedish parent company of the group are not included in the statistics either.

A group can have more than one parent company at several levels up to the parent company of the whole group (the owner). In such cases, the owner exercises its influence on the education provider's activity through the parent companies. These are referred to in the report as *holding companies.*[16] The purpose of holding companies, in addition to running their own activities,

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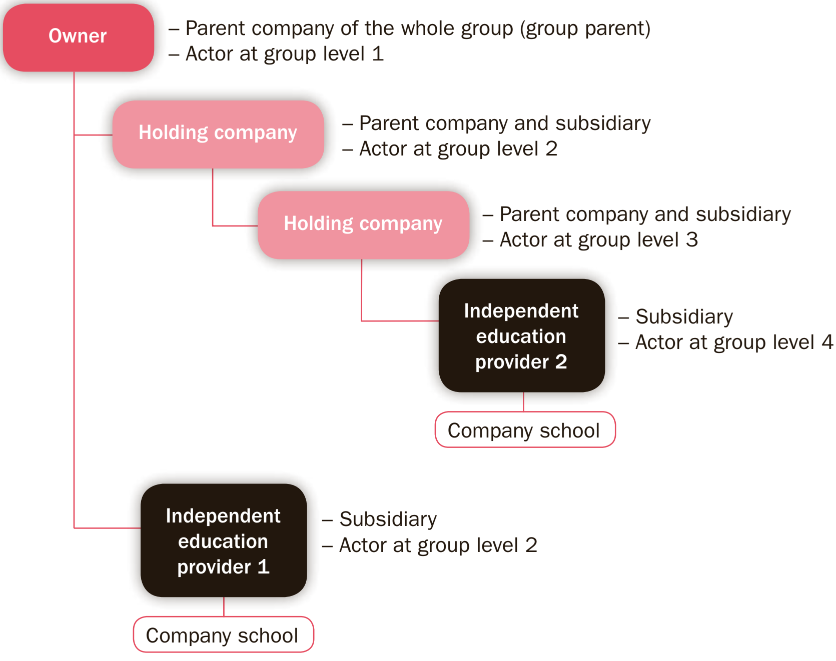
14. The education is run with permission from the municipality (preschools) or the state (compulsory schools and upper secondary schools). According to Chap. 23, paras. 1–2, of the Education Act (2010:800), information on preschools can also be submitted by contract to a natural private person or a legal entity, preserving the responsibility for education provision for the municipality. The Agency's assessment, however, is that grant-maintained preschools (with an independent education provider) completely dominate. It is not possible to differentiate between the activities in the statistics, which means that there may be individual cases of contracts among the actors defined in the report as independent education providers (with independent preschools).
15. Private persons or companies and organisations with a holding of less than 50 per cent are not included as owners in this report, even if, in practice, all independent education providers have one or more owners. The report only includes owners that are assumed to have decisive influence over the education provider's activity, according to the criterion of a holding of at least 50 per cent. For each such education provider, there can therefore only be one owner.
16. The structure of one holding company can be described as a group consisting of several smaller groups.

can be to collect the ownership and subsidiaries' assets in one company within the group. The holding companies can also be involved in the management and leadership of the subsidiaries' activities. Below is an example of a group structure that includes owners, holding companies, and education providers and their schools.

Example of a group structure
– owner, holding company and education provider



The example shows that there are two independent education providers in the group and that these are found at different levels in the group. Education provider 1 is at the second level. This means that there are no holding companies between the owner and the education provider. Education provider 2 is at the fourth level in the group. There are two holding companies between the owner and the education provider.

Different numbers of actors – with different roles

The way the actors are presented and grouped in the report varies depending on the types of schools and the areas being studied. The number of actors is therefore not constant; it depends on how it is calculated. The roles of the private actors cannot be separated fully from each other. Independent education providers with one owner belong to, for example, a group. In this report, a group is also treated as an actor, which means that a number of independent education providers (and all owners) belong to two categories of private actors. Furthermore, the owner and holding company categories can overlap. Representatives for the owner could, for example, be on the board of a holding company. The dividing line between owner and holding company, from an actor perspective, is therefore not always obvious. In addition, the owner may itself be an education provider. This means that the owner owns and runs its own schools at the same time as it owns a further education provider of one or more schools.[17]

Activities of the actors

The report describes the scope of the different actors' activities. Here, *activities* refers to the existence of education, not the different education programmes or pedagogic methods offered to the pupils in a given education programme. The scope of the activities is measured in different ways depending on what can be illustrated with the available statistics. In the main, the size of the actors is described in terms of the number of preschools and the number of schools and pupils in compulsory schools and upper secondary schools. It is the first time that statistics have been collected for preschools, which means that the information for this type of school only covers 2013. For compulsory schools and upper secondary schools, the statistics used were collected previously by the Agency, which allows comparisons between the years 2009, 2011 and 2013.

Number of preschools

The scope of the actors' activities in preschools is mainly described based on the number of independent preschools. The Agency's statistics currently do not contain information on the number of independent preschools or enrolled children for each independent education provider.[18] Information on the number of independent preschools for each education provider has instead been collected from the company register (Statistics Sweden, UC). This register does not have data on the number of enrolled children however.

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17. Owners that are also education providers must own an *education provider* in the studied school type to belong to a school group according to the definition in this report. It is therefore not enough for the owner/education provider to own a company that runs an activity other than a preschool, compulsory school or upper secondary school. For this reason, the biggest independent education provider in compulsory schools, Internationella Engelska Skolan (IES), for example, is not counted, despite owning the company English Summer School. In October 2013, IES was also not owned to more than 50 per cent by any company, which is another reason for not counting it as a group in this report.
18. Information is collected from the municipalities on the total number of preschools and enrolled children per type of education provider in each municipality (independent and municipal). From autumn 2014, the Swedish National Agency for Education will collect information on children and staff in preschools and educational care from every municipality and independent education provider.

Number of pupils in compulsory schools and upper secondary schools

The number of pupils is used as a measure for education providers, owners and groups as it is the pupils who are affected by the way the education is organised and run. The number of pupils is also an indication of the economic prerequisites of the actors, as the municipalities' contributions to independent education providers is based on the number of pupils. The number of pupils therefore provides a measure of the size of the actor's market shares in the education sector. The number of pupils is not the only measure of size used in the report however. It is supplemented by the number of schools.

Reading instructions

Chapters 2–4 describe the private actors in preschools, compulsory schools and upper secondary schools. The chapters have a common structure. They start with a description of all the education providers, independent and public. The different kinds of independent education providers are then described, with comparative references in the text, footnotes and tables for the public education providers. The link between independent education providers and groups is then presented through a description of the owners of the education providers. The rest of the content in the chapter differs for the different types of schools. The aim is to provide as broad a picture as possible of the variations in private actors in the education system. There are also a number of in-depth sections for compulsory and upper secondary schools (these are described below).

In *Chapter 2*, the Agency maps the independent education providers and owners in preschools for the first time. The description refers to the year 2013.

Chapter 3 looks at compulsory schools. It describes the changes that have taken place between the years 2009, 2011 and 2013 in terms of private actors. A number of in-depth sections describe how independent education providers with different operational forms differ in terms of the composition of pupils and teachers.

Chapter 4 looks at upper secondary schools and presents statistics that correspond to those presented for compulsory schools for the years 2009, 2011 and 2013. One in-depth section describes how the number of pupils has changed at the education provider level between 2009 and 2013 as well as in the local upper secondary school markets. Another in-depth section describes the owners and holding companies and how their activities are linked to the schools' education providers.

Chapter 5 summarises and discusses the results of the report.

CHAPTER 2

Preschool

Preschool

A total of approximately 489,300 children were enrolled in preschools in autumn 2013, which is more than ever before.[19] Most preschool children are enrolled in preschools with municipal education providers, though independent preschools became more common in Sweden during the 1990s and continued to increase during the 2000s. In 2013, 20 per cent of all children in preschools attended an independent preschool. This corresponds to 97,400 children.

In this chapter, the Agency presents statistics on the independent education providers and the owners of the independent education providers in preschools. The focus is on the actors' size in terms of number of independent preschools. The available statistics do not include the number of enrolled children per independent education provider or owner. The information presented in the chapter is for the year 2013.

Almost all independent education providers run only one preschool

Statistics from Statistics Sweden's company register show that there are considerably more independent education providers than municipal ones in the year 2013. According to the register, there are a total of 2035 independent education providers. Together they run 2576 preschools. As there are more than 7000 municipal preschools, this means that about one in four preschools is independent.[20] It also means that almost all of the independent education providers (93 per cent) only run one preschool. Only a small proportion has more than one independent preschool: 5 per cent have between two and four preschools, and 2 per cent have more than four preschools.[21]

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19. Of all the children aged 1–5 years in the population, 84 per cent attended a preschool. As an alternative to preschool, outside the education system, educational care can be offered. In 2013, approximately 15,000 children aged 1–5 years were enrolled in educational care. This corresponds to 3 per cent of all children aged 1–5 years.
20. There are municipal preschools in all 290 municipalities in Sweden. According to Statistics Sweden's company register, there were a total of 7350 municipal preschools in 2013, and according to the Swedish National Agency for Education's statistics, there were 7142 municipal preschools. The difference is due to the different methods of collecting the information. The information in this chapter will hereafter be taken from Statistics Sweden's company register.
21. Compared with the municipal education providers, the relationship is the opposite. Only a few municipalities in Sweden run fewer than five preschools themselves.

Ten independent education providers have more than ten preschools

Even if most of the independent education providers only run one preschool, there are a number of education providers that break this pattern. Just over 30 independent education providers have at least five preschools, and ten of these have more than ten preschools.

Table 2.1 shows the ten biggest independent education providers in preschools in 2013.

Table 2.1 The ten biggest independent education providers in terms of number of preschools. Preschool, 2013.

	Number of preschools
Pysslingen Förskolor och Skolor AB	99
Inspira Förskolor & Skolor AB	34
TP Förskolor AB	25
Vittraskolorna AB	16
Norlandia Förskolor AB	14
Ulna AB	13
Förskoleteamet Helianthus AB	12
Frilufts Förskolor i Stockholm AB	12
Föreningen för Vård och fostran av Barn och Ungdom (FVBU)	11
Futuraskolan AB	11
Total for the 10 biggest independent education providers	247
Proportion (%) of all independent preschools	10
Proportion (%) of all preschools	2

Comment: All the education providers except Norlandia Förskolor AB, Ulna AB and FVBU belong to a group. Pysslingen Förskolor och Skolor AB and Vittraskolorna AB belong to the same group (AcadeMedia AB).

The table above shows that a tenth of all independent preschools are run by the ten biggest education providers. Three of these – Pysslingen Förskolor och Skolor AB, Inspira Förskolor & Skolor AB and TP Förskolor AB – run more than 20 independent preschools each. Together the three education providers run 158 of the just over 2500 independent preschools in Sweden in 2013. This is equivalent to 6 per cent of all independent preschools.

About 200 independent education providers also run compulsory schools

For most of the independent education providers in preschools, this is their main activity, but approximately 130 of the just over 2000 independent education providers first and foremost run education at compulsory school level.[22] A further few operate primarily in other areas. The latter include, for example, the Salvation Army with four preschools and a number of education providers whose main activity is aimed at so-called child day-care activities.[23]

Regardless of whether the education provider's main activity is in preschools, it is relatively common for education providers in preschools to also run compulsory schools.[24] Approximately one in ten independent education providers (201 education providers) was active in both types of school in 2013. It is most common for such education providers to run only one independent preschool or compulsory school. This corresponds to 153 education providers or three-quarters of the education providers found in both types of school. It is less common for one education provider to run more than one preschool and a compulsory school. Only 14 independent education providers do so, which corresponds to 7 per cent of the education providers that combine preschool and compulsory school education. A few run at least five preschools or five compulsory schools: Pysslingen Förskolor och Skolor AB, Vittraskolorna AB and Futuraskolan AB.[25] More information on these education providers' activities in compulsory schools can be found in Chapter 3.

Cooperative is the most common form of operation

Another way of looking at which actors have established themselves in preschools is to study the education providers' forms of operation.[26] The form of operation provides information on, for example, whether the activity is run for profit (limited company) or if its aim is to promote the members' economic interests (cooperative). The most common form of operation in preschools is cooperatives. Like the non-profit associations, they are often run by parents.[27] Other forms of operation are also represented. Table 2.2 shows the distribu-

22. Main activity refers to the education provider's activity that employs most people.
23. The term child day-care activities can be found in Statistic Sweden's Swedish Standard Industrial Classification and includes, for example, leisure-time centres and educational care.
24. Only about ten independent education providers run preschools and upper secondary schools.
25. In terms of number of employees, Pysslingen is bigger in preschools than in compulsory schools, and Vittraskolan and Futuraskolan are bigger in compulsory schools than in preschools.
26. The forms of operation considered in this report are the legal forms.
27. Parent cooperatives have been around for a long time in preschools alongside municipal preschools. They were permitted when the right to establish schools was limited for other private actors up until 1991 and between 1994 and 2006.

tion of independent education providers and independent preschools by all the forms of operation found in preschools in 2013.

Table 2.2 Independent education providers and independent preschools according to the education provider's form of operation. Proportions in per cent. Preschool, 2013.

	Independent education providers		*Independent preschools*	
	Number	*Proportion*	*Number*	*Proportion*
Cooperative	1,067	52	1,103	43
Limited company	541	27	978	38
Non-profit association	215	11	243	9
Foundation	71	3	89	3
Private firm	73	4	73	3
Trading company	41	2	48	2
Religious community	27	1	42	2
Total	2,035	100	2,576	100

Table 2.2 shows that the most common form of operation, after cooperatives, is limited companies, in terms of number of education providers and preschools. Together, the cooperatives and limited companies run about 80 per cent of Sweden's independent preschools. Almost one in ten independent preschools is run by non-profit associations. It is far less common, however, for independent preschools to be run by foundations and religious communities or as limited companies or trading companies.

The limited company form in preschools is closely linked to the size of the education provider. The limited companies are clearly over-represented among the education providers with more than one preschool compared with the number of limited companies in preschool in general.[28] Two out of three education providers with several preschools are limited companies.[29] The proportion of education providers with at least two preschools for, for example, cooperatives is only 13 per cent. It is also shown that nine of the ten biggest independent education providers presented in Table 2.1 are run as limited companies.

28. As reported earlier, 7 per cent of all independent education providers run more than one preschool, which corresponds to 140 education providers.
29. These limited companies run 80 per cent of all independent preschools that have one education provider with several preschools.

Limited companies are biggest in metropolitan areas

According to the statistics from Statistics Sweden's company register, there were independent preschools in 239 of Sweden's 290 municipalities in 2013. Cooperatives are the most widespread form of operation in Sweden with preschools in 198 municipalities. There are limited companies and non-profit associations in 120 and 101 municipalities respectively. There are other forms of operation in a small number of municipalities. This varies from approximately 30 to 50 municipalities depending on the form of operation.

The proportion of preschools for different forms of operation varies between municipalities. The metropolitan areas, in particular, have many preschools run by limited companies.[30] The limited companies run half of all independent preschools, and the cooperatives run one-third. In general, there is a difference between cities and rural areas in terms of the number of independent preschools of different operational forms. In Sweden's rural municipalities, which have 78 per cent of all of its independent preschools, the proportions of preschools for different forms of operation are equal to the proportions for the whole country. The other independent preschools are located in more rural municipalities.[31] Here, the cooperatives have a more dominant role, running 58 per cent of all independent preschools. The non-profit associations are also slightly more common in rural municipalities than in Sweden as a whole, with a proportion of 13 per cent of all independent preschools. In these municipalities, only one in five independent preschools is run by a limited company. The remainder, approximately one-tenth of the independent preschools, are distributed across the other forms of operation: limited companies, religious communities, trading companies and foundations.

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30. Here, metropolitan areas include those municipalities classified by the Swedish Association of Local Authorities and Regions as metropolitan municipalities (Stockholm, Gothenburg and Malmö) and suburban municipalities.
31. Urban municipalities are those that the Swedish Association of Local Authorities and Regions classifies as metropolitan municipalities, suburban municipalities, large cities and suburban municipalities to large cities. Rural municipalities are commuter municipalities, tourism and travel industry municipalities, manufacturing municipalities, sparsely populated municipalities and other municipalities in densely and sparsely populated regions.

Few independent education providers belong to a group of companies

Majority ownership is uncommon in preschools. There are therefore not that many company preschools. In other words, it is primarily independent education providers that influence the activities in Sweden's independent preschools. Of the total 2,035 independent education providers, 108, or 5 per cent, belong to a group. Of the total 2,576 independent preschools, 375 belong to a group. This corresponds to 15 per cent of all the independent preschools. In 2013, 70 groups operated in preschools. One in four groups (18 of 70) has two education providers. A further 9 per cent of the groups (6 of 70) have at least three education providers. The education providers in a group are generally bigger, in terms of the number of preschools, than those that do not belong to a group. Just over one in four independent education providers that belong to a group has at least two preschools. The proportion of all independent education providers that have more than one preschool is 7 per cent.

Ten owners of one-tenth of all independent preschools

Of the 70 groups in the preschools, 30 only have one preschool. Of the other 40, the ten biggest are shown in Table 2.3 by the owner of the education providers that run the company preschools. The table also shows the number of education providers in the groups. The information about owners is supplemented in the table by the names of the holding companies or the biggest education providers in each group.

Table 2.3 The ten biggest owners in terms of number of preschools. Preschool, 2013

	Number of Preschools	*Number of education providers*
Svensk Utbildning Intressenter Final Holding AB	116	3
AcadeMedia AB		
Atvexa AB	36	4
TP Förskolor AB, and others		
Gemin AB	34	1
Inspira Förskolor & Skolor AB		
Frilufts Förskolor i Sverige AB	12	1
Frilufts Förskolor i Stockholm AB		
Helianthus Holding AB	12	1
Förskoleteamet Helianthus AB		
Cibenon AB	11	1
Futuraskolan AB		
Rönnbergs Friskolor AB	9	5
AR Förskolor i Täby AB, and others		
Bina Holding AB	9	1
Hälsans Förskola Stockholm AB		
Jensen Group AB	8	2
Jensen Education School AB, Jensen Education College AB		
Mind Mill Management AB	6	5
Avalonia AB		
Total number of preschools/education providers for the 10 biggest owners	253	24
Proportion (%) of all company schools/independent education providers in the group	67	22
Proportion (%) of all independent preschools/independent education providers	10	1

Comment: The name of the owner is shown in bold (group parent company). Examples of holding companies or education providers that belong to the owner are given on the line below. *Owner* refers to the company that directly or indirectly or via holding companies owns at least 50 per cent of the education provider. For the ten biggest *independent education providers*, see Table 2.1.

Table 2.3 shows that one-tenth of all independent preschools belong to the ten biggest owners in preschools. Of these, one owner dominates when the size of the activity is calculated in terms of the number of preschools, AcadeMedia AB. It has more than three times as many preschools as the second biggest owner, Atvexa AB. Almost one-third of all company preschools belong to AcadeMedia AB, and most of them have Pysslingen Förskolor och Skolor AB as the education provider.[32]

32. Other education providers in the group are Vittraskolorna AB (16 preschools) and Söder Triaden Förskolor AB (1 preschool).

CHAPTER 3

Compulsory school

Compulsory School

The number of independent compulsory schools has increased every year since the educational policy reforms were introduced in the 1990s with the aim of increasing choice in schools and the supply of independent schools. The proportion of pupils who attend independent compulsory schools has also increased, including during the first decade of the 2000s when the pupil numbers decreased. The number of pupils in compulsory school increased again from 2011, and in 2013, 14 per cent of all compulsory school pupils attended independent schools.

This chapter presents the independent education providers and their owners in compulsory schools. The focus is on the scope of the activities, primarily in terms of number of pupils. It highlights the situation in 2013 and makes comparisons between the years 2009, 2011 and 2013.

Twice as many independent as municipal education providers

The vast majority of compulsory school pupils in Sweden attend schools with municipal education providers. Table 3.1 provides a summary of the number of education providers, compulsory schools and pupils in 2013, according to whether the education provider is independent or public (municipal or state).

Table 3.1 Number education providers, compulsory schools and pupils by type of education provider. Compulsory school, 2013.

	Education providers	*Compulsory schools*	*Pupils*
Independent	581	792	125,960
Municipal	290	4,090	794,869
State	1	5	168
All education providers	872	4,887	920,997

Comment: The state is the education provider of the five Sami schools.

The information in the table means that one in six compulsory schools in Sweden was independent of the public sector in 2013. This corresponds to almost 800 compulsory schools. There are twice as many independent education providers as municipal ones, but the number of compulsory schools per independent education provider is small. The average number of pupils per independent compulsory school (159 pupils) is slightly lower than for municipal ones (194 pupils). Table 3.2 shows how the number of independent education providers, independent compulsory schools and pupils in independent compulsory schools has changed in recent years (2009–2013).

Table 3.2 Number of independent education providers, independent compulsory schools and pupils in independent compulsory schools. Compulsory schools, 2009–2013.

	2009	*2011*	*2013*
Independent education providers	587	607	581
Independent compulsory schools	709	761	792
Pupils in independent compulsory schools	95,948	112,144	125,960

Taken over the whole period (2009–2013), the number of independent education providers for compulsory schools has fallen slightly. The number of compulsory schools run by independent education providers and the number of pupils who attend them have both increased. Between 2009 and 2013, the number of independent compulsory schools increased by 12 per cent and the number of pupils in independent compulsory schools by almost one-third (31 per cent).

A few independent education providers have large market shares

The vast majority of independent education providers of compulsory schools (92 per cent) only ran one compulsory school in 2013.[33] Just over half of the pupils in independent compulsory schools attend a school that is run by an education provider that runs one (1) compulsory school. This is a big fall from 2009, when the proportion was ten percentage points higher. The small education providers are still important but, at the same time, there has been a clear increase in the big independent education providers' market shares in recent years. For example, the statistics for 2013 show that some of the independent education providers are among the biggest in Sweden, even when the municipal education providers are included. Table 3.3 shows how many pupils are distributed over the ten biggest independent education providers in 2013.

33. The situation is different for the public education providers. Only 15 per cent of Sweden's 290 municipalities have fewer than five compulsory schools that are run by a municipality. Of these, only four municipal education providers have only one compulsory school.

Table 3.3 The biggest independent education providers in terms of number of pupils. Compulsory school, 2013.

	Number of compulsory schools	*Number of pupils*
Internationella Engelska Skolan i Sverige AB	20	14,101
Pysslingen Förskolor och Skolor AB	47	9,595
Kunskapsskolan i Sverige AB	29	8,851
Vittraskolorna AB	26	5,604
Fridaskolorna AB	4	1,840
Futuraskolan AB	6	1,308
Karl-Oskar Utbildning AB	10	1,206
Prolympia AB	3	1,146
AcadeMedia fria grundskolor AB	7	1,109
Ulno AB	3	1,068
Total for the 10 biggest independent education providers	155	45,828
Proportion (%) of all independent compulsory schools/ pupils in independent compulsory schools	20	36
Proportion (%) of all compulsory schools/ pupils in independent compulsory schools	3	5

Comment: All the education providers except Internationella Engelska Skolan i Sverige AB, Karl-Oskar Utbildning AB, AcadeMedia fria grundskolor AB and Ulno AB belong to a group. Pysslingen Förskolor och Skolor AB and Vittraskolorna AB belong to the same group (AcadeMedia AB).

The table shows that more than one-third of all pupils in independent compulsory schools attended schools run by the ten biggest education providers in 2013. This proportion has increased since 2009, when it was 28 per cent. Four independent education providers have a particularly strong position in the independent school market, with more than 5,000 pupils each. Of the pupils who attend Sweden's independent compulsory schools, 30 per cent attend a school by one of these four education providers. The differences in the number of pupils are significant, however, also between these education providers. Internationella Engelska Skolan i Sverige AB has most pupils, followed by Pysslingen Förskolor och Skolor AB.[34]

Almost all of the independent education providers that were among the ten biggest in Sweden in 2013 were also the biggest in 2009 and 2011. New among the ten biggest since 2009 is Futuraskolan AB and, since 2011,

34. In terms of number of pupils, Internationella Engelska Skolan i Sverige AB is the fifth biggest education provider in compulsory schools in Sweden in 2013, bigger than the municipality of Linköping and almost as big as the Municipality of Uppsala. Pysslingen Förskolor och Skolor AB is the twelfth biggest education provider in Sweden with about one hundred more pupils than the municipalities of Helsingborg and Lund.

Karl-Oskar Utbildning AB and AcadeMedia fria grundskolor AB. Vittra-skolorna AB changed its name from Törnskogen Utbildning AB in 2011 and took over the compulsory schools that previously belonged to Rösjötorp Utbildning AB and Vittra AB. Törnskogen and Rösjötorp belonged to the ten biggest independent education providers in 2009 and 2011.

The big independent education providers are growing most

The overall importance of a few independent education providers for growth in recent years is described in Table 3.4. It shows the increase in pupils from 2011, when the number of pupils in compulsory schools began to increase again at national level after a long period. The number of pupils of independent as well as public education providers in 2011 and 2013 are shown in the table.

Table 3.4 Number of pupils in compulsory schools with independent and public education providers. Compulsory school, 2011–2013.

	2011	*2013*	*Change (%) 2011–2013*
Independent education providers	112,144	125,960	+12
... of which the ten biggest education providers	*34,529*	*45,828*	*+33*
Public education providers	776,514	795,037	+2
All education providers	888,658	920,997	+4

The table shows clearly that the growth in the number of pupils between 2011 and 2013 was particularly strong for the independent education providers that were already big. Together, they increased their number of pupils by a third. The bottom row shows that this is not related to the general increase in the number of pupils in compulsory schools and that the total number of pupils in Sweden only increased by 4 per cent.[35]

A further concentration in compulsory school education to a few education providers can also be expected ahead of the school start in the autumn term of 2014. This is shown in the Swedish Schools Inspectorate's statistics.[36] The Swedish Schools Inspectorate is the authority that grants permission to start an independent compulsory school. Ahead of the autumn term of 2014, the authority has granted permission for eight independent education

35. The ten biggest education providers increased their percentage of pupils by almost as much (27 per cent) also between 2009 and 2011. Between these years, the number of compulsory school pupils remained largely unchanged at national level but fell slightly for the public education providers.
36. www.skolinspektionen.se/statistik-tillstånd-2014-15. See also the Swedish Schools Inspectorate (2013), *Beslut om ansökningar att starta fristående skola – läsåret 2014/15.*

providers to establish new compulsory schools. Altogether, the eight education providers plan to establish 31 new compulsory schools.[37] The education providers for the majority of these (26 schools) are Internationella Engelska Skolan i Sverige AB and Jensen Education College AB. Internationella Engelska Skolan i Sverige AB had 20 compulsory schools in 2013. Jensen Education College AB had four compulsory schools with a total of 450 pupils. If the new schools start as planned in the autumn term of 2014, the number of schools and pupils could increase further for some of the big independent education providers.

About fifty independent education providers also run upper secondary schools

A small proportion of the almost 600 independent education providers in compulsory schools are also education providers for one or more upper secondary schools. In 2013, there were 51 such education providers, which corresponds to 9 per cent of all independent education providers in compulsory schools. It is slightly more common for the education providers that have both compulsory schools and upper secondary schools to have most pupils in compulsory schools.[38] Sweden's biggest education provider in terms of number of compulsory school pupils, Internationella Engelska Skolan i Sverige AB, for example, has relatively few pupils in upper secondary schools (equivalent to 5 per cent of the education provider's total number of pupils in the two types of schools). Due to their size, this still corresponds to approximately 700 upper secondary school pupils.[39] There are also education providers with the majority of their pupils at upper secondary school level.[40]

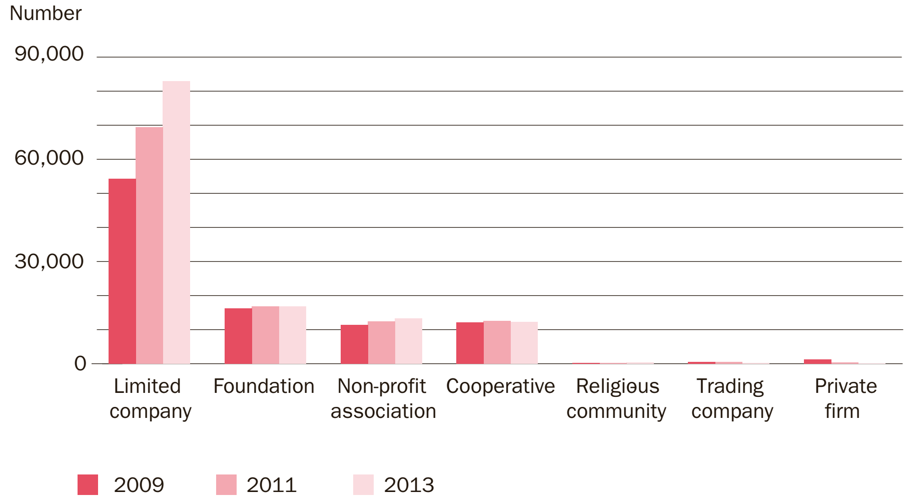
The limited companies are growing most

A majority of the independent compulsory schools' pupils attend schools run by limited companies. It is not unusual for other operational forms in compulsory schools. Figure 3.1 shows the distribution of pupils according

37. Only refers to education that has been fully or partly approved at schools that are new for the academic year 2014/15.
38. In 2013, 33 out of 51 education providers had more pupils in compulsory schools than in upper secondary schools.
39. Of the other education providers presented as the ten biggest education providers in compulsory schools in Table 3.3, Kunskapsskolan i Sverige AB and Fridaskolorna AB also run upper secondary schools. The number of pupils corresponds to 7 per cent of their total numbers of pupils in compulsory schools and upper secondary schools, which equates to approximately 1880 and 140 pupils respectively.
40. The biggest of these are Stiftelsen Viktor Rydbergs skola, Lärande i Sverige AB and Jensen Education College AB with approximately 1400, 2200 and 3700 upper secondary school pupils respectively. This corresponds to between 72 and 89 per cent of all their pupils at compulsory and upper secondary level.

to all operational forms for independent education providers during the period 2009–2013.

Figure 3.1 Number of pupils in independent compulsory schools according to the education provider's form of operation. Compulsory school, 2009–2013.



The growth has been unequivocal since 2009. An increasing number and growing proportion of pupils attend compulsory schools run by limited companies. Two-thirds of pupils in independent compulsory schools in 2013 attended schools run by limited companies, and this proportion has grown fast since 2009 (from 57 to 66 per cent). The remaining third of pupils almost exclusively attend compulsory schools run by foundations and non-profit associations or cooperatives. Private firms have almost completely disappeared as an operational form in compulsory schools since 2009. In 2013, only three education providers remain that run their schools as independent companies, and together they have just over 100 pupils. Since 2009, the number of pupils has increased slightly for foundations, cooperatives and religious communities but, above all, for non-profit associations with approximately 2000 pupils.[41] The proportion of pupils attending schools run by foundations, religious communities, cooperatives and non-profit organisations has fallen slightly, however, since 2009.

For the big education providers with more than one compulsory school, the proportion of pupils who attend compulsory schools run by limited companies is even bigger than shown above. For these education providers, the pro-

41. For non-profit associations, this corresponds to an increase of 16 per cent between 2009 and 2013.

portion is as high as 94 per cent. The limited companies' schools are also big in terms of number of pupils compared with other operating forms, except for foundations.[42] In other words, the limited company form is linked to big and expanding activities, even if a small number of really big education providers drive up the average. An increasing number of pupils are attending compulsory schools run by limited companies, the number of pupils per school is high and the limited companies are over-represented among the education providers that run more than one school.

Smaller differences between cities and rural areas

As well as having the most pupils of all the independent education providers in different operational forms, the limited companies have the greatest geographic spread among the compulsory schools. In 2013, there were compulsory schools run by limited companies in 119 municipalities. Cooperatives, non-profit associations and foundations were represented in 89, 63 and 43 municipalities respectively. Cooperatives, which had a smaller number of pupils in 2013 than non-profit associations and foundations at national level, are represented in more municipalities than non-profit associations and foundations.

The proportion of pupils in compulsory schools run by limited companies (of all the independent compulsory schools) has increased since 2009 in urban municipalities as well as more rural ones.[43] This increase has come from different levels and has been strongest in the rural municipalities (from 39 to 56 per cent). In the urban municipalities, the proportion of pupils in compulsory schools run by limited companies has increased from 55 to 64 per cent between 2009 and 2013. In other words, the difference between cities and rural areas is smaller in 2013 than it was in 2009 in terms of the proportion of pupils in compulsory schools run by limited companies. Nonetheless, one in four pupils in rural municipalities attends a compulsory school run by a cooperative. The corresponding proportion in urban municipalities is 7 per cent, with limited companies and foundations dominating.

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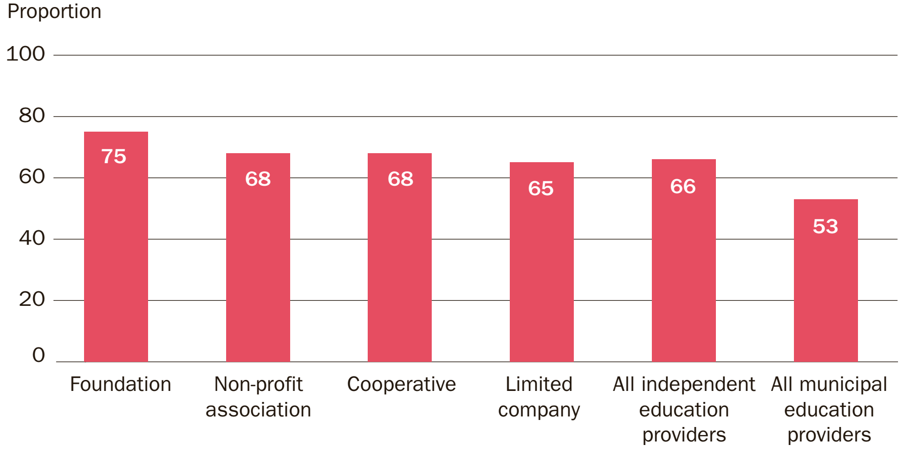
42. On average, 176 pupils attend compulsory schools run by limited companies and 185 pupils attend the foundations' compulsory schools. The numbers of pupils for the other forms of operation are between 36 and 127 pupils, with the lowest number of pupils in the private firms.
43. Here, the classification into urban and rural municipalities is based on the classification of municipalities by the Swedish Association of Local Authorities and Regions (SALAR). Urban municipalities include municipalities that SALAR classifies as metropolitan municipalities, suburban municipalities, large cities and suburban municipalities to large cities. Rural municipalities include commuter municipalities, tourism and travel industry municipalities, manufacturing municipalities, sparsely populated municipalities and other municipalities in densely populated regions and sparsely populated regions.

Many pupils with parents with study skills in the foundations

In recent years, the Agency has confirmed that there has been an increase in the spread of pupils' results between schools, and that the pupils' family backgrounds continue to be of great importance to the pupils' results.[44] In this context, there has been a discussion on whether the right to choose school has contributed to or increased this development.[45] A relevant question in this discussion is not just what the spread in the pupils' family backgrounds and results looks like between schools but also if there are differences between different types of education providers in this regard. In this study, the Agency has compared the pupils' family backgrounds between education providers with different forms of operation.[46] In Figure 3.2, the family background is measured as the proportion of pupils with parents with post-secondary education.[47] In the figure, private firms, trading companies and religious communities have not been included as only a few compulsory schools are run by education providers with these forms of operation. They are included in the bar graph, however, which shows all independent education providers in terms of the proportion of pupils with socio-economically favourably conditions.

Figure 3.2 Proportion (%) of pupils with parents with post-secondary education for education providers with different forms of operation. Compulsory school, 2013.



44. Swedish National Agency for Education (2012), *Likvärdig utbildning i svensk grundskola? En kvantitativ analys av likvärdighet över tid.*
45. Swedish National Agency for Education (2013), *Skolverkets lägesbedömning 2013.*
46. The comparisons are based on a sample of pupils, as the information on pupils' family backgrounds in the Swedish National Agency for Education's statistics is not collected for all pupils. For example, information is not collected from schools with other than a general specialisation.
47. Higher education of parents influenced the pupils' educational achievements as such a background benefits, for example, the child's language development, the involvement and support the parents can give the child and the child's self-image of succeeding at school.

The figure above shows that the independent education providers generally have a higher proportion of pupils with socio-economically favourable conditions compared with the municipal education providers. There are also differences between independent education providers however. The foundations have the highest proportion of pupils with parents with a higher education (three-quarters of the pupils). Limited companies have the lowest proportion. As there are so many limited companies, the average holds for all independent education providers. The proportion of pupils with parents with a higher education in cooperatives and non-profit associations is slightly higher than for limited companies, but there are also big differences between schools in the different operational forms.[48]

Differences in the compositions of pupils between different types of education providers have been shown previously, including in the anthology Konkurrensens konsekvenser (Consequences of competition).[49] It shows that the number of years of education by parents in 2008 was higher for compulsory schools run by foundations and non-profit associations than for those run by limited companies. The limited companies in turn had pupils with parents who had a higher education than the parents of the pupils in municipal schools. The Agency's calculations thus show, with a similar measurement of the pupils' family backgrounds, that independent education providers in compulsory schools also attracted different groups of pupils in 2013.

Cooperatives have the highest proportion of teachers with degrees

When the variation in the composition of pupils for different education providers is described, as in the section above, it also raises the question of whether there are differences with regard to teaching resources (measured in, for example, teacher density or proportion of teachers with a degree in education). The teaching resources play a big role in the pupils' success. The teaching resources are especially important for pupils who, for different reasons, are less well equipped to cope with school.[50]

For many years, the Agency has seen that teacher density has been higher in municipal than independent compulsory schools. This difference has been

48. The differences between associations, and limited companies and foundations are therefore not statistically significant. The differences in the proportion of pupils with parents with post-secondary education in cooperatives and non-profit associations, on the one hand, and municipal education providers, on the other, are statistically significant however.
49. Hartman, L. (ed.) (2011), *Konkurrensens konsekvenser. Vad händer med svensk välfärd?*
50. Swedish National Agency for Education (2013), *Kommunernas resursfördelning till grundskolor.*

small, however, and between 2012 and 2013 it disappeared altogether.[51] When it comes to the proportion of teachers with degrees in education, there are also differences between municipal and independent education providers, as shown in Figure 3.3. The figure does not show religious communities, trading companies and private firms separately as they run so few compulsory school compared with the other forms of operation. They are included in the bar chart however, which shows the proportion of teachers with degrees for all independent education providers.

Figure 3.3 Proportion (%) of teachers with a degree in education for education providers with different forms of operation. Compulsory school, 2013.

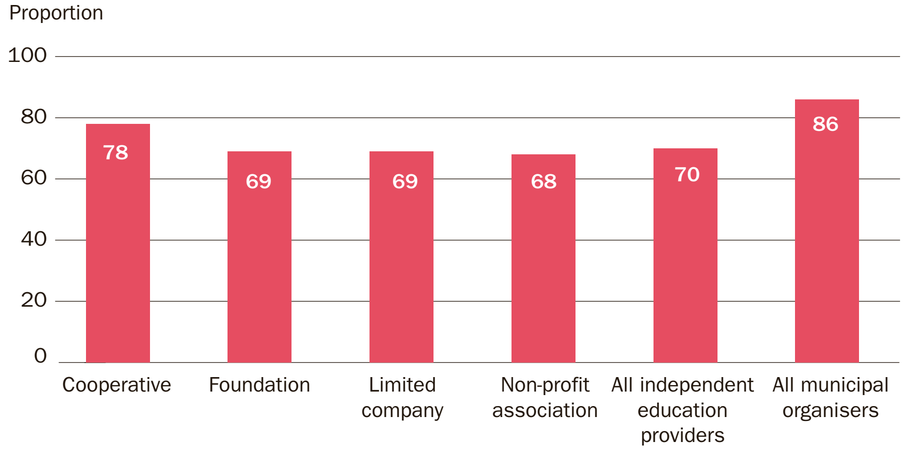


Figure 3.3 shows that none of the forms of operation among the independent education providers has as high an average proportion of teachers with degrees in education as the municipal education providers. The highest proportion among the independent education providers is for the cooperatives. The proportion of teachers with degrees in education in 2013 was approximately ten percentage points higher in the cooperatives than in the foundations, limited companies and non-profit associations. The proportion is also almost ten percentage points lower than for the municipal education providers. Since 2009, however, the portion of teachers with a degree in education has increased among the independent organisers. The increase has been slightly higher in the cooperatives than in the other forms of operation.[52]

51. The average number of pupils per teacher (full-time posts) was 12 in independent schools as well as municipal schools in 2013.
52. The proportion of teachers with degrees in education has increased in the cooperatives' compulsory schools from 73 to 78 per cent between 2009 and 2013. In the foundations and limited companies, the proportion has increased from 65 to 69 per cent, while the proportion in the non-profit associations has been stable during this period.

No clear link between pupils' needs and teaching resources

As shown in Figure 3.3, there are no big differences in the proportions of teachers with degrees in education between foundations, limited companies and non-profit associations. Furthermore, as shown in Figure 3.2, the proportion of pupils with socio-economically favourable conditions is the same as the average for limited companies and non-profit associations. However, the foundations do have a higher proportion of pupils with favourable conditions than the average. There is therefore no clear pattern that points to pupils and schools with less favourable conditions having a higher proportion of teachers with a degree in education.

A clearer link between pupil composition and teaching resources can be found between all the independent education providers, on the one hand, and all the municipal education providers, on the other. The municipal education providers have a more mixed composition of pupils than the independent education providers, which is reflected in the even distribution of pupils with parents with high and low levels of education. The municipal education providers also have the highest proportion of teachers with degrees in education compared with the independent operational forms described above.

It has not been possible in this report to analyse in more detail how the link between the pupils' family backgrounds varies with teaching resources at education provider and school level. It is important to continue to follow up how teaching resources are distributed between schools with different education providers and the extent to which resources go to schools at which pupil groups are at risk of lower results.[53]

More independent education providers belong to a group of companies than before

It has become increasingly common in compulsory school education for an independent education provider to have an owner and thereby belong to a group of companies. This means that the number of actors able to influence the conditions of the activity at school level has increased. Table 3.5 shows the change in the number of independent education providers that belong to a group between 2009 and 2013. The table also shows how many compulsory schools these education providers run and for how many pupils they are responsible.

53. The compensatory task for schools is given in Chap. 1, para. 4, of the Education Act (2010:800).

Table 3.5 Number of independent education providers in groups, company schools and pupils in company schools. Proportion (%) of the total number of independent education providers, independent schools and pupils in independent schools. Compulsory school, 2009–2013.

	2009		*2011*		*2013*	
	Number	*Proportion*	*Number*	*Proportion*	*Number*	*Proportion*
Independent education providers in groups	73	12	80	13	91	16
Company schools	164	23	183	24	234	30
Pupils in company schools	28,655	30	33,134	30	41,144	33

The table above shows that the numbers of education providers owned by groups as well as the number of company schools and pupils in company schools have increased in recent years, especially between 2011 and 2013 when the number of pupils increased in general. In 2013, more than 40,000 compulsory school pupils attended company schools, an increase of 8,000 pupils in two years.

Between 2011 and 2013, the increase in the number of education providers in groups also went hand in hand with the increase in the number of groups. The number of groups increased from 65 to 75 between these years.

Small as well as big groups of companies

The concept of a group is often linked to an organisation of a large size. For the school sector this would mean, for example, that there were several education providers in a group or that a foreign-registered venture capital company was behind the group's activity. However, the statistics show that the group structures vary and that many groups are small in terms of number of education providers, schools and pupils. This big variation in independent education providers and independent schools in general is broadly reflected between the groups.

On average, the company schools are slightly bigger than the other independent schools.[54] Approximately a quarter of the 75 groups in compulsory schools in 2013 do not have more than 20 pupils each. Half of the groups have between about 20 and 320 pupils, and five groups have more than 1,000 pupils each.

Almost all (63 of 75) groups had only one education provider in 2013 and of these, most only ran one compulsory school. Altogether, the 63 groups with one education provider therefore only cover 15 per cent of all the compulsory

54. On average, the independent compulsory schools that are not part of a group have 152 pupils, compared with company schools, which have 176 pupils.

school pupils who attend company schools.[55] This means that a large majority of pupils in company schools attend schools that belong to groups with at least two education providers.

The number of education providers (and compulsory schools) says little about the number of pupils in a given group however. For example, there are groups with a relatively large number of education providers and schools but only a few pupils. It is not unusual for these groups to run education that is adapted for pupils with special needs and in small contexts. Several of these groups own several schools, for example Magelhusen AB (the MBC schools), Re Education Holding AB (the Snitz schools) and Dawn 1 AB (Solhaga-gruppen's schools).[56] Of the 61 compulsory schools that limit their intake to pupils with special needs, two-thirds (40 schools) belong to a group. The schools are distributed over 23 different groups.

One in six independent compulsory schools belongs to the ten biggest owners

A few of the 75 owners or groups in compulsory schools in 2013 run a large number of compulsory schools and, together, they have a large number of pupils. This is shown in Table 3.6, which presents the ten biggest owners in 2013 in terms of number of pupils. The table also includes the number of compulsory schools for each owner. The table gives the name of the owner of the company schools. The information on owners in the table is also supplemented with the names of the schools or holding companies in the group.

55. This corresponds to 5 per cent of all pupils in independent compulsory schools.
56. The information is taken from a national mapping by the Swedish National Agency for Education in 2013–2014 of independent compulsory schools and upper secondary schools for pupils with special needs, according to Chap. 10, para. 35, and Chap. 15, para. 33, of the Education Act (2010:800). See Swedish National Agency for Education (2014), *Fristående skolor för elever i behov av särskilt stöd – en kartläggning.*

Table 3.6 The ten biggest owners in terms of number of pupils. Compulsory school, 2013.

	Number of compulsory schools	*Number of pupils*
Svensk Utbildning Intressenter Final Holding AB	76	15,450
AcadeMedia AB		
Magnora AB	29	8,851
Kunskapsskolan		
Frida Utbildning AB	4	1,840
Fridaskolan		
Ted International Holding AB	5	1,571
Prolympia, Änglagårdsskolan		
Cibenon AB	6	1,308
Futuraskolan		
Göteborg Region Association of Local Authorities	4	837
Göteborgsregionens Internationella Skola AB (ISGR)		
Lärande i Östergötland Förvaltnings AB	3	776
Erlaskolan		
Almwik Holding AB	2	690
Raoul Wallenbergskolan		
Atvexa AB	4	680
Rälsen, Byängsskolan		
Svensk Friskola i Stockholm AB	1	659
Västerholms friskola		
Total number of compulsory schools/pupils for the 10 biggest owners	134	32,662
Proportion (%) of all company schools/pupils in company schools	57	79
Proportion (%) of all independent compulsory schools/pupils in independent compulsory schools	17	26
Proportion (%) of all compulsory schools /pupils in compulsory schools	3	4

Comment: The name of the owner is shown in bold (group parent company). Examples of holding companies or schools that belong to the owner are given on the line below. Owner refers to the company that directly or via holding companies owns at least 50 per cent of the education provider. For the ten biggest *independent education providers*, see Table 3.3.

One in six independent compulsory schools belongs to one of the ten biggest owners. Approximately a quarter of the independent compulsory school pupils attend these schools. The proportion of pupils has also increased slightly since 2009 (from 23 to 26 per cent), which corresponds to an increase of almost 11,000 pupils. Two groups or owners dominate: AcadeMedia AB and Magnora AB (Kunskapsskolan). There is also a big difference between these two, however, with AcadeMedia as the actor, of the two, with the biggest number of compulsory schools and pupils. AcadeMedia on its own is responsible for more than a tenth of the pupils who attend independent compulsory schools in Sweden. This makes it the fourth biggest actor in independent compulsory schools even when the municipal education providers are included.[57] Table 3.6 also shows that according to the available registers, there is one public owner of a number of independent compulsory schools, the Göteborg Region Association of Local Authorities.[58] Public influence on independent schools is permitted according to the Education Act, though not to 100 per cent.[59]

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57. Only the municipalities of Stockholm, Gothenburg and Malmö have more pupils in their municipal compulsory schools.
58. According to information from the Swedish Schools Inspectorate, however, a change in the education provider's legal form has been reported to the Swedish Schools Inspectorate, from limited company to local authority.
59. The provisions according to Chap. 2, para. 5, of the Education Act (2010:800) state that an independent education provider may be approved if, inter alia, the right to decide is not vested in just one or several municipalities of county councils or legal entities where one municipality or county council, through ownership or some other way, has legally decisive influence.

CHAPTER 4

Upper secondary school

Upper secondary school

Since 2009, the number of pupils in upper secondary schools has fallen sharply and, according to forecasts by Statistics Sweden, this fall is expected to continue until 2016. So far, this change has mostly resulted in fewer pupils in municipal upper secondary schools, though the number of pupils in independent upper secondary schools fell in 2012, the first time since the beginning of the 1990s. The increase in the *proportion* of pupils in independent upper secondary schools stopped the following year. In 2012 and 2013, the proportion of upper secondary school pupils attending independent upper secondary schools was 26 per cent.

This chapter shows the number of independent education providers and owners of education providers in the Swedish upper secondary school market at national level. The focus is on the extent of the activities, primarily in terms of number of pupils. It sheds light on the situation for 2013 as well as the development between 2009 and 2013.

Almost as many independent as municipal education providers

The majority of upper secondary school pupils attend municipal schools, but the independent education providers and independent upper secondary schools also play an important role in the total supply of upper secondary schools. Table 4.1 gives an overview of this relationship for the year 2013. The table shows the number of education providers, upper secondary schools and pupils by type of education provider, i.e. whether the education provider is independent or public.

Table 4.1 Number of education providers, upper secondary schools and pupils by type of education provider. Upper secondary school, 2013.

	Education providers	*Upper secondary schools*	*Pupils*
Independent	227	460	85,079
Municipality	235	809	227,365
Municipal association	10	60	14,930
County council	8	17	2,822
All education providers	480	1,346	330,196

The table shows that about one in three upper secondary schools in Sweden is independent. The table also shows that there are almost as many independent education providers as municipalities running upper secondary schools in 2013.[60] There are fewer independent than municipal schools however, including in terms of number of pupils. The average number of pupils for an independent upper secondary school is 185.[61]

The absolute number of pupils in independent upper secondary schools increased from the beginning of the 1990s up until 2011. The increase took place during periods with a stable number of pupils (1990s) as well as during periods with a rising number of pupils (first decade of the 2000s). According to Statistics Sweden's forecasts, the period 2009–2013 constituted the first five years of a total of eight with a fall in the number of pupils at national level. Table 4.2 shows how the number of independent education providers, with their upper secondary schools and pupils, has changed during these years.

Table 4.2 Number of independent education providers, independent upper secondary schools and pupils in independent upper secondary schools. Upper secondary school, 2009–2013.

	2009	*2011*	*2013*
Independent education providers	249	235	227
Independent upper secondary schools	458	499	460
Pupils in independent upper secondary schools	85,510	94,060	85,079

Between 2009 and 2013, competition for upper secondary school pupils increased at national level, as there were fewer pupils. Table 4.2 shows different ways in which the brakes were applied during this period in terms of expansion of the activities in independent upper secondary schools. The change took place in stages. First, the number of independent education providers fell (2009–2011). In relative terms, the fall in the number of independent education providers of upper secondary schools was twice as big between 2009 and 2011 as between 2011 and 2013. Seen over the whole period, 2009–2013, the number of independent education providers fell by 9 per cent.

60. N.B. A total of 32 municipalities are included in the ten local authorities shown in the table.
61. The average number of pupils in municipal upper secondary schools (with amunicipality, municipal association or county council as the education provider) is 277.

Since 2011, the fall in the number of independent education providers has been followed by a fall in the number of independent upper secondary schools and pupils (2011–2013). The number of schools and pupils thus continued to increase (2009–2011) at the same time as the number of upper secondary school pupils at national level had started to fall. In relative terms, the fall is particularly noticeable in the number of upper secondary schools, which, between 2011 and 2013, fell by 8 per cent. The number of independent upper secondary schools is roughly the same in 2013 as it was in 2009, and the same applies to the number of pupils in independent upper secondary schools.

A few independent education providers have large market shares

A big majority of the independent education providers (80 per cent) only ran one upper secondary school in 2013.[62] Approximately one-third (34 per cent) of the pupils in independent upper secondary schools attend these schools. Almost half (47 per cent) of all pupils attend upper secondary schools run by education providers with at least five upper secondary schools each.[63] The growth in the past few years shows opposite trends to those described above. Several of the big education providers have adapted or closed down their organisations in pace with the falling number of pupils and increased competition. These changes did not take place until after 2011, and the concentration of pupils to a few big independent education providers is still considerable.[64] Table 4.3 shows the ten biggest independent education providers in 2013 in terms of numbers of pupils and proportions of the total number of pupils to which they correspond. The table also includes the number of upper secondary schools run by each education provider.

62. Approximately half of the public education providers only run one upper secondary school.
63. This means that the remaining proportion of pupils (19 per cent) attend schools whose education providers run between two and four upper secondary schools.
64. For example, in 2013 there are only 17 independent education providers, each of which runs at least five upper secondary schools, which is a total of just under 200 upper secondary schools. At these schools, a third of all pupils attend independent upper secondary schools.

Table 4.3 The ten biggest independent education providers in terms of number of pupils. Upper secondary school, 2013.

	Number of upper secon-dary schools	*Number of pupils*
Praktiska Sverige AB	36	4,856
ThorenGruppen AB	21	4,580
Jensen Education College AB	14	3,701
Plusgymnasiet AB	15	3,555
Nordens Teknikerinstitut AB	13	2,822
Stiftelsen Stadsmissionens skola	7	2,540
Ljud & Bildskolan LBS AB	11	2,255
Lärande i Sverige AB	15	2,182
IT Gymnasiet Sverige AB	10	2,123
Mikael Elias Gymnasium AB	11	2,078
Total for the 10 biggest independent education providers	153	30,692
Proportion (%) of all independent upper secondary schools/pupils in independent upper secondary schools	33	36
Proportion (%) of all upper secondary schools/pupils in upper secondary schools	11	9

Comment: All the education providers except Stiftelsen Stadsmissionen's school belong to a group. Plusgymnasiet AB, Nordens Teknikerinstitut AB, Ljud & Bildskolan LBS AB, IT-Gymnasiet Sverige AB and Mikael Elias Gymnasium AB belong to the same group (AcadeMedia AB).

The table shows that more than one-third of the pupils in the independent upper secondary schools attend the ten biggest education providers' schools (which corresponds to almost one-tenth of all pupils at upper secondary level). The proportion has decreased from 2011, however, when it was 42 per cent.[65] The table also shows that the distribution of pupils is more even between the ten biggest education providers than it is in compulsory schools (see Table 3.3). In other words, Praktiska Sverige AB and ThorenGruppen AB do not dominate as much over other big education providers in upper secondary schools as, for example, Internationella Engelska Skolan i Sverige AB and Pysslingen Förskolor och Skolor AB do in compulsory schools.

Five of the education providers shown in the table have belonged to the ten biggest independent education providers during all the years studied in this report (2009, 2011 and 2013): Praktiska Sverige AB, Thorengruppen AB, Jensen Education College AB, Nordens Teknikerinstitut AB and IT Gymnasiet Sverige AB. Only ThorenGruppen AB increased its number of pupils between 2009 and 2011 and between 2011 and 2013. Its expansion has also been

65. In 2009, the proportion was 38 per cent. In other words, the proportion of pupils in the ten biggest independent education providers increased between 2009 and 2011, before falling between 2011 and 2013.

strong, from approximately 1,500 to 4,500 pupils between 2009 and 2013. Three education providers that were in the top ten list of education providers with most pupils in 2009 and 2011 no longer existed in 2013. They went into liquidation before the start of the autumn term of 2013.[66]

Independent education providers are not losing as much as public ones

The change in the number of pupils in independent upper secondary schools can also be illustrated by comparing them with the way the number of pupils in public schools has changed. Table 4.4 shows the change in the number of pupils in upper secondary schools run by different groups of education providers during the period 2009–2013.

Table 4.4 Number of pupils in schools with independent and public education providers. Upper secondary school, 2009–2013.

	2009	*2013*	*Change (%) 2009–2013*
Independent education providers	85,510	85,079	– 1
…of which the 10 biggest independent education providers	*32,159*	*30,692*	*– 5*
Public education providers	309,261	245,117	– 21
All education providers	394,771	330,196	– 16

The table shows that the independent education providers have coped well with the increased competition for upper secondary school pupils. The public schools lost one-fifth of their pupils between 2009 and 2013, while the corresponding fall was not as big for the independent upper secondary schools. The fall in the number of pupils has so far affected the big independent education providers a little harder than the other independent education providers.

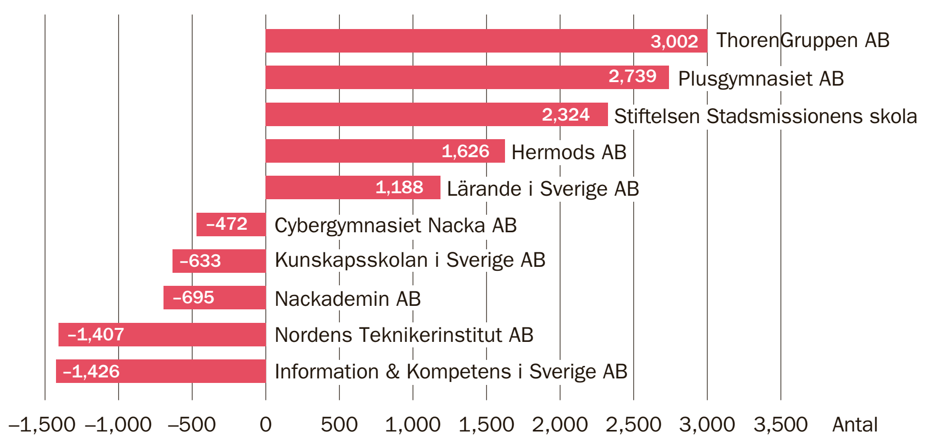
At the same time, the newly established upper secondary schools consist of those run by the big education providers. Of the 14 applications for new education programmes approved by the Swedish Schools Inspectorate in full or part for the academic year 2014/15, four belonged to the education provider Jensen Education College. Nine applications came from different education providers at the AcadeMedia Group.[67] As Table 4.3 shows, these education providers and groups are well represented among the ten biggest independent education providers in Sweden.

66. All of them belonged to the JB Group: Drivkraft Värend AB, Utbildning Leder Till Rätt Arbete Education i Norden AB and Novum Kompetens- och Datautveckling AB.
67. The applications considered here only refer to education at schools that are new for the academic year 2014/15.

Winners and losers in the competition for pupils

Despite many independent education providers having lost pupils between 2009 and 2013, and several of them being education providers with many schools and pupils, there are almost as many education providers that have seen more positive growth. Of the 169 independent education providers that operated in 2009, 2011 and 2013, 80 education providers increased their number of pupils between 2009 and 2013. For 88 education providers, the number of pupils fell, and for one education provider it remained unchanged. Most of the changes, for increases and decreases in the number of pupils, lie in the interval of a few pupils to approximately 200 pupils per education provider between 2009 and 2013. For a number of education providers, the change in the number of pupils has been bigger. Figure 4.1 shows the five education providers that had the biggest increases and decreases in their activities, in terms of number of pupils.

Figure 4.1 Independent education providers with the biggest change in number of pupils. Upper secondary school, 2009–2013.



Of the independent education providers that have grown fastest between 2009 and 2013, it is worth mentioning Stiftelsen Stadsmissionens Skola. It took over several of the activities that were closed down when the JB Group went into liquidation. This means that the foundation grew between 2011 and 2013 from a couple of hundred to a couple of thousand pupils. The figure also shows examples of strong growth in the number of pupils as well as falls in the number of pupils for education providers in one and the same group. At AcadeMedia AB, Plusgymnasiet has expanded strongly, while a number of schools that previously belonged to Nordens Teknikerinstitut have a new education provider in the group (Mikael Elias Gymnasium). Another change is that Kunskapsskolan i Sverige has lost many pupils and thereby its previous position as one of Sweden's ten biggest education providers in upper secondary schools.

Different growth in the upper secondary school market

What have the changes in numbers of pupils in independent upper secondary schools looked like in different parts of Sweden? The Agency studied regional variations in the availability of upper secondary education in a previous report. In that report, Sweden's municipalities were divided into local school markets for upper secondary school education.[68] Such a division means that the local school market replaces the municipality as a geographic area.[69]

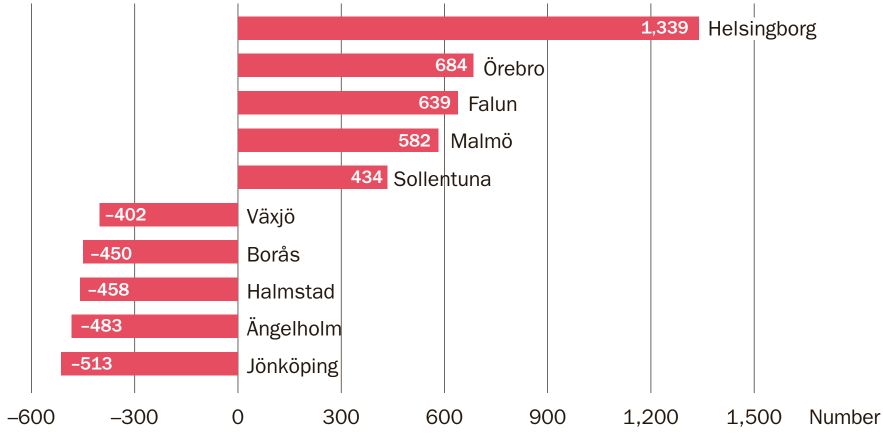
The Agency identified 94 secondary school markets in the above report.[70] The statistics for 2013 show that there are independent upper secondary schools in 69 of them, while 25 markets lack any independent upper secondary schools. In 46 upper secondary school markets, the number of pupils in independent upper secondary schools fell between 2009 and 2013. During the same period, there was an increase in 28 upper secondary school markets.

In many of the markets, the changes were small, whether the number of pupils increased or decreased. Half of all the upper secondary school markets were in the interval of minus 125 pupils to plus 20 pupils. There is no pattern to the changes based on the size of the upper secondary school market (pupil population). Big and small markets, with different conditions for school choice and competition between education providers, have seen increases as well as decreases in the number of pupils during the period. Figure 4.2 shows the independent upper secondary school markets that have changed most between

68. Swedish National Agency for Education (2011), *Skolmarknadens geografi. Om gymnasieelevers pendling på lokala och regionala skolmarknader.* For applications of this division in other reports, see Swedish National Agency for Education (2012), *Det svåra valet. Elevers val av utbildning på olika slags gymnasiemarknader* and Swedish National Agency for Education (2014), *Närvaro och frånvaro i gymnasieskolan* (preliminary title of upcoming report).
69. In 2013, there are independent upper secondary schools in 108 of Sweden's 290 municipalities. There are municipal upper secondary schools in 254 municipalities. In 29 municipalities, there are neither independent nor municipal upper secondary schools. In other words, pupils in Sweden are referred to schools in nearby municipalities to a varying degree. The area in which a pupil lives and studies therefore often consists of several municipalities that together regulate the supply of education through cooperation agreements or by forming an upper secondary school association (municipal association). If there are sufficient pupils who commute to their school, the municipalities between which they commute can be considered a market area in terms of demand and supply of upper secondary school education. Analyses of local or regional markets, instead of municipalities, are therefore more relevant
70. The division was based on statistics on the pupils' commuting between municipalities in 2009.

2009 and 2013 in terms of the absolute number of pupils in independent upper secondary schools.

Figure 4.2 Upper secondary school markets with the biggest change in the number of pupils in independent schools. Upper secondary school, 2009-2013.



Helsingborg's local upper secondary school market expanded particularly strongly between 2009 and 2013 in terms of numbers of pupils in independent upper secondary schools.[71] This was despite the number of independent upper secondary schools in the same market having fallen slightly between 2011 and 2013. Helsingborg is the fifth biggest upper secondary school market in Sweden in terms of total number of upper secondary school pupils. Malmö and Örebro can also be considered among Sweden's biggest upper secondary school markets. These markets are also among those that have grown most in Sweden between 2009 and 2013 despite the strong fall in the pupil population at national level.[72]

Twelve independent education providers are also in compulsory schools and preschools

Chapter 2 showed that about 200 independent education providers are active in both preschools and compulsory schools in 2013. Chapter 3 stated that there are about 50 education providers that run both compulsory schools and upper secondary schools. Only a small number, 12 education providers, are

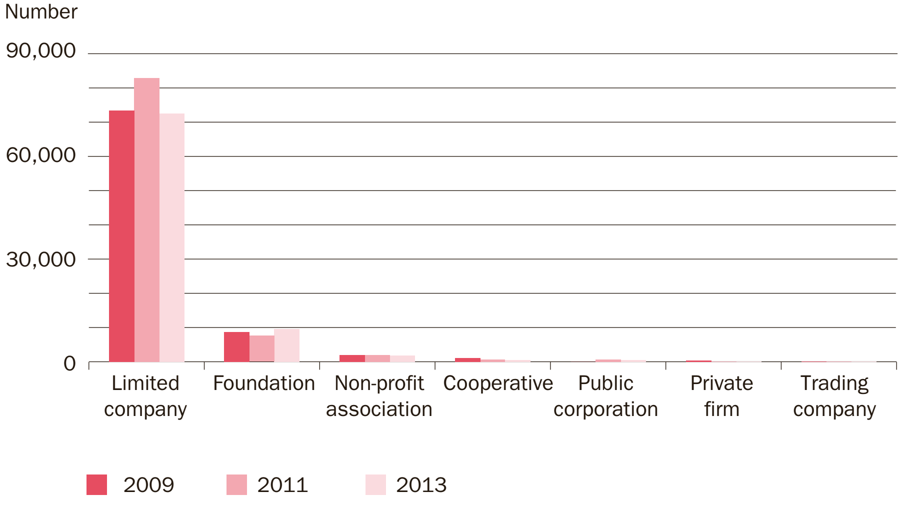
71. Helsingborg's local school market consists of the municipalities of Helsingborg, Bjuv, Höganäs, Landskrona, Svalöv and Åstorp.
72. Malmö's local school market consists of the municipalities of Malmö, Svedala, Trelleborg and Vellinge, and Örebro's of the municipalities of Örebro, Hällefors, Kumla, Lekeberg and Nora.

active in all three school types: preschool, compulsory school and upper secondary school.[73] They differ, including in terms of size, operational form and specialisation. One of the education providers is the third biggest in Sweden in upper secondary schools, Jensen Education College AB, while a couple of education providers are among the biggest in compulsory schools.[74] Six of the education providers that are active in all three school types have a Waldorf specialisation or are denominational. Two education providers run international schools. A further education provider runs compulsory schools and upper secondary schools that limit their intakes to pupils with special needs.[75]

Limited companies dominate

Limited companies is the dominant operational form among the independent education providers in upper secondary schools. The existence of limited companies can be seen as an indicator of the extent to which actors in schools operate in a market and are exposed to competition. The company form relates to profit-taking in the activity. Figure 4.3 shows how the pupils in upper secondary school are distributed according to the legal operational forms of the independent education providers during the period 2009–2013.

Figure 4.3 Number of pupils in independent upper secondary schools according to the education provider's form of operation. Upper secondary school, 2009–2013.



73. It should be added that there are actors at group level that own preschools as well as compulsory schools and upper secondary schools. The indisputably biggest is AcadeMedia AB.
74. Fridaskolorna AB, Stiftelsen Göteborgs Högre Samskola and Bladins Skola, Stiftelsen.
75. According to Chap. 10, para. 35, and Chap. 15, para. 33, of the Education Act (2010:800).

Figure 4.3 shows that limited companies dominated during the studied years. The proportion of pupils in independent upper secondary schools that attended schools run by limited companies was approximately 85 per cent during 2009–2013. The proportion has fallen slightly, however, since 2011. One explanation for this is that the schools that closed down under the brand JB Gymnasiet were taken over by another foundation. In 2013, about one-tenth (11 per cent) of all pupils in independent upper secondary schools attended schools run by foundations, the most common operational form after limited companies. The proportion of pupils in foundations has increased by three percentage points since 2011.

Just as in preschools and compulsory schools, the limited companies in upper secondary schools have bigger market shares among the main education providers compared with education providers that run only one school, though the differences are smaller in upper secondary schools than in the other types of schools. Among the education providers with more than one upper secondary school, the proportion of pupils who attend schools run by limited companies is 91 per cent.

Wide geographic spread of limited companies

As shown earlier in this chapter, according to the Agency's calculations, there are 94 upper secondary school markets, based on commuting by upper secondary school pupils in 2009. Since 2009, the number of upper secondary school markets with independent upper second schools has fallen slightly, from 72 to 69 markets. There are limited companies in almost all of these markets, in the northern and southern parts of Sweden. Where there are independent upper secondary schools, there are only three upper secondary school markets with no schools run by limited companies.[76] Otherwise, foundations were the most widespread operational form, with upper secondary schools in 20 markets. There were non-profit associations in eight upper secondary school markets, while the other forms of operation were only represented in a few markets. In 62 of the 69 upper secondary school markets, there were two operational forms in 2013. The greatest variation was in the upper secondary school markets of Stockholm and Västerås, where four forms of operation were represented. Here, the proportion of pupils in upper secondary schools run by limited companies was slightly lower than for Sweden as a whole.

The limited companies are spread over different types of markets with regard to the size of the pupil population. They are represented in the metropolitan areas as well as smaller regions and in small upper secondary school

76. Haninge, Kristinehamn and Arvika upper secondary school markets.

markets. In most upper secondary school markets, the proportion of pupils in schools run by limited companies is higher than the national average. In 15 of these, however, it is below the average, for example, in the above-mentioned upper secondary school market in Stockholm, which, in terms of number of pupils, is the biggest in Sweden. There is no pattern that shows that the proportion of pupils in schools run by limited companies should be greater in big school markets than in small ones.

Majority of pupils attend company schools

In upper secondary schools, it is common for an independent education provider to belong to a group of companies. The influence on the education provider's activity is therefore not limited to the education provider in these cases. Table 4.5 shows the growth since 2009 in number of independent education providers that belong to a group of companies and how many company schools and pupils in company schools these education providers are responsible for.

Table 4.5 Number of independent education providers in groups, company schools and pupils in company schools. Proportion (%) of the total number of independent education providers, independent schools and pupils in independent schools. Upper secondary school, 2009–2013.

	2009		*2011*		*2013*	
	Number	*Proportion*	*Number*	*Proportion*	*Number*	*Proportion*
Independent education providers in a group	102	41	91	39	100	44
Company schools	268	59	313	63	300	65
Pupils in company schools	56,930	67	65,257	69	56,922	67

The table shows that approximately four out of ten independent education providers belonged to a group during 2009–2013. More than half of all the independent upper secondary schools are company schools. Two-thirds of the independent education providers' pupils attend these schools, though the number and proportions vary slightly between the different years. This is due in part to changes that have taken place in a few big groups, alongside changes in the pupil population. So, for example, three-quarters of the increase in the number of pupils in company schools between 2009 and 2011 can be attributed to the growth in the number of education providers, schools and pupils in the AcadeMedia Group. The smaller number of pupils in company schools between 2011 and 2013, in addition to the general fall in the number of pupils in Sweden, can be explained by the JB Group going into liquidation and some of its pupils being taken over by schools that do not belong to any group.

Most groups of companies are small

The number of groups in upper secondary schools has varied from year to year. Between 2009 and 2011, the number of groups fell from 70 to 63. Thereafter, between 2011 and 2013, it increased to 72 groups. The groups also differ greatly from each other. For example, there are big differences in numbers of pupils, even if company schools on average are slightly bigger than other independent upper secondary schools.[77] The lowest number of pupils was noted in 2013 for the owner The Mountain Lodge Funäsdalen AB. Its school, with only a few pupils, is aimed at young people with Asperger's syndrome. AcadeMedia AB has most pupils with more than 20,000. Group schools are spread over large parts of Sweden and are run by a large number of education providers. When the numbers of pupils of all the groups are compared, it can be confirmed that the quarter of the groups with the lowest number of pupils did not have more than approximately 80 pupils at most in 2013. The quarter of groups with the highest numbers of pupils had approximately 370 pupils or more. This means that half of all groups had pupil numbers between 80 and 370 in 2013.

The vast majority of groups (64 out of a total of 72) had only one education provider in 2013, and most of these (51 groups) owned only one upper secondary school. Altogether, the 64 groups with one education provider teach 46 per cent of all upper secondary school pupils who attend company schools.[78] This means that the responsibility for just over half of the company schools' pupils is distributed over eight school owners, each of which owns at least two education providers.[79] The next section presents the big owners of the independent education providers in upper secondary schools.

Ten owners of half of Sweden's independent upper secondary schools

It was noted above that the groups in upper secondary schools differ from each other in several respects. Many of them are also considered small, in terms of number of schools and pupils. It is difficult, however, to overlook the fact that the company schools are primarily linked to a number of big actors. The importance of a few owners becomes clear in Table 4.6. It shows the ten biggest owners in 2013 in terms of pupils. The table gives the name of the owner

77. The independent upper secondary schools that do not belong to a group have 176 pupils on average, while company schools have 190.
78. It corresponds to 31 per cent of all pupils in independent upper secondary schools.
79. It corresponds to 36 per cent of all pupils in independent upper secondary schools.

of the company schools. The information on owners is supplemented in the table with the names of the schools or holding companies in the group.

Table 4.6 The ten biggest owners in terms of numbers of pupils. Upper secondary school, 2013.

	Number of upper secon-dary schools	*Number of pupils*
Svensk Utbildning Intressenter Final Holding AB	100	22,102
AcadeMedia AB		
ThorenGruppen AB	26	5,379
Thoren Business School, Yrkesgymnasiet, Tekniska Gymnasiet		
Vindora Holding AB	36	4,856
Praktiska		
Jensen Group AB	14	3,701
Jensen Gymnasium		
Lärande i Östergötland Förvaltnings AB	15	2,182
Realgymnasiet		
Re Education Holding AB	7	2,099
Cybergymnasiet, Snitz Gymnasium, Donniergymnasiet		
Inter IKEA Investments AB	7	1,912
Design & Construction College, Hermods Gymnasium		
Magnora AB	7	1,877
Kunskapsgymnasiet, Internationella Kunskapsgymnasiet		
Magasin 3 Förvaltning AB	3	769
Kitas		
Fagerberg & Dellby Fond i AB	4	752
Hagströmska gymnasiet		
Total number of schools/pupils for the 10 biggest owners	219	45,629
Proportion (%) of all company schools/pupils in company schools	73	80
Proportion (%) of all independent upper secondary schools/pupils in independent upper secondary schools	48	54
Proportion (%) of all upper secondary schools/pupils in upper secondary schools	16	14

Comment: The name of the owner is shown in bold (group parent company). Examples of holding companies or schools that belong to the owner are shown on the line below. Owner refers to the company that directly or indirectly via holding companies owns at least 50 per cent of the education provider. For the ten biggest *independent education providers*, see Table 4.3.

The table illustrates that a few owners influence the majority of the upper secondary school education run by Sweden's company schools, or approximately half of all the independent upper secondary schools in 2013. The group also has just over half of all pupils in independent upper secondary schools. The importance of the ten biggest owners was slightly greater still in 2011, when they had just over 80 per cent of the pupils in company schools (or 57 per cent of all the pupils in independent upper secondary schools).

One actor dominates. In 2013, AcadeMedia AB has four times as many pupils and schools as the second-biggest group, ThorenGruppen AB. One in four pupils in an independent upper secondary school attends a school run by one of AcadeMedia's 16 education providers. This corresponds to 7 per cent of the total number of upper secondary school pupils in Sweden. Since 2009, the group has grown by almost 9,000 upper secondary school pupils.

Ownership structures are changing fast

As shown earlier, in the upper secondary schools, there were 72 owners in as many groups in 2013. There are cases when an owner forms one or more holding companies in the group, which means that the ownership is at several levels. This relationship is important to the discussion on private actors' influence on an education provider's activity and which actors should be subject to an assessment of their suitability and long-term approach.

The majority of the owners of independent education providers of upper secondary schools (45 of 72), however, run their activities without any holding companies. The remaining 27 groups have one or more holding companies, through which the owner checks or controls the education provider's activity. In 19 of these groups, there is only one owner and one holding company. In eight groups, there are two or more holding companies in addition to the owner itself. At most, there were five holding companies between the owner and the education provider in one group, years 2011 and 2013.[80]

Since 2009, the number of holding companies has increased from 29 to 40. The increase in the number of holding companies has been greater than the increase in the number of owners. This means that the current groups have become bigger rather than more. On average, during the period 2009–2013, approximately 40,000 of the pupils at company schools have had education providers owned at several levels via one or more holding companies. This corresponds to approximately two-thirds of all pupils in company schools at upper secondary school level. Organisational changes from year to year,

80. AcadeMedia AB with the education provider Didaktus Skolor AB. In 2009, there were at most six holding companies in one group: Inter Ikea Holding SA with the education provider Hermods AB.

however, mean that the number of pupils in schools with different ownership structures is constantly changing. In recent years, the development shows that when a holding company is formed or closes down in one of Sweden's big school groups, such as AcadeMedia AB or Praktiska Sverige AB, it has a direct effect at national level in terms of the proportion of pupils in schools with a certain ownership structure.

Owners and holding companies run different activities

The influence on school activities exerted by the owners and holding companies of education providers and how this influence is exercised vary between groups. On an overall level, this can be considered by studying the main activity of owners and holding companies based on statistics in the registers on the industry and trades of Sweden's companies and organisations.[81] This can give an indication of the main aim of the companies' activities and how they may be linked to the activity run by the education providers.[82]

Three different types of activities have been identified here for the owner/holding company: (1) it runs its own activity (so-called commercial activity), (2) it controls or manages the subsidiaries' activities and (3) it owns or administers the subsidiaries' assets (which is done in, for example, fund manager s or so-called holding and investment companies).[83]

The statistics show that just over half (54 per cent) of all owners and holding companies for which there is information in the above-mentioned registers mainly run commercial activity. If this type of activity is divided up further, it becomes clear that almost half of those that run their own activity do so in education forms within or outside the education system.[84] Other owners and holding companies whose main activity is not commercial take part in the management or control of others' activities (30 per cent). There are almost twice as many owners in this category as there are holding companies. The remainder, 16 per cent, own and administer others' activities, for example,

81. Statistics Sweden's classification according to the Swedish Standard Industrial Classification. The Swedish National Agency for Education has done its own processing for this report based on this.
82. N.B. The division is made according to the companies' main activity. In practice, this means that one and the same company can combine different types of activities.
83. The samples from the above-mentioned registers lack information on the industry/trade for a number of owners and holding companies. This means that only 87 (of a total of 112) owners and holding companies are included. Owners and holding companies that provide support or advice in these activities have also been added to the categories of leadership/management and ownership/administration.
84. Other activities include, for example, care, construction, hire or administration of properties and manufacturing.

through a fund in which shareholders can invest. This category consists almost exclusively of owners.

To summarise, far from all owners and holding companies run the education in some form of education provider activity themselves. Instead it is quite common for the owners and holding companies to take part in and provide support for control and leadership of the education providers' activities. A small proportion plays even less of a role in terms of actively running or taking part in the school activities. The aim of the activity is then primarily to collect and administer the group's financial assets for, for example, fiscal reasons.

CHAPTER 5

Summary and discussion

Summary and discussion

This chapter summarises the most important results of the mapping of private actors in preschools and schools in Sweden, which includes more than 2,500 independent education providers and their owners. The following questions have been answered: How many private actors are there in preschools, compulsory schools and upper secondary schools in 2013, and who are they? How extensive is their activity in relation to each other and to the public actors? What are the differences between the private actors' activities? How have the number of private actors and the importance of private actors changed in compulsory schools and upper second schools between 2009 and 2013?

The chapter starts with a summary of the report's results with regard to the importance of the private actors in preschools, compulsory schools and upper secondary schools. A few questions raised by the results are then discussed in terms of what they may mean to the continued development of the Swedish education system. This discussion is primarily based on the results presented for compulsory schools and upper secondary schools as it has been possible to follow the development of these types of schools in this report.

Many small education providers contribute to diversity in preschools

In 2013, the independent preschool market was characterised by a large number of independent education providers – just over 2,000. In the vast majority of cases, these education providers only run one independent preschool, though there are also education providers with many preschools, which means that one in ten independent preschools belongs to one of Sweden's ten biggest independent education providers. Approximately 200 of the independent education providers in preschools, i.e. one-tenth, are also education providers of independent compulsory schools. There are approximately 2,500 independent preschools in Sweden, which can be compared with just over 7,000 municipal preschools. A clear majority of Sweden's preschools are therefore municipal.

The most common form of operation of independent education providers in preschools is cooperatives, including parent cooperatives. Just over half, or more than four in ten independent preschools, of the independent education providers are cooperatives. Just over a quarter of all independent education providers are limited companies. Together they run almost as many preschools as the cooperatives. The limited companies are therefore on average bigger than the other independent education providers in terms of number of preschools and they are also the most common operational form in Sweden's three metropolitan areas.

In preschools, a small number of groups own a majority of the education providers' share capital. Only 5 per cent, or just over 100 of the independent education providers, are part of a group. The groups are relatively large, however, in terms of number of preschools. Therefore, 15 per cent of all independent preschools (almost 400) are owned by groups. The biggest group, AcadeMedia AB, owns more than 100 preschools.

Market and profit-driven companies are important in compulsory schools and upper secondary schools

In 2013, almost 130,000 pupils attended independent compulsory schools run by almost 600 independent education providers. Approximately 85,000 pupils attended independent upper secondary schools run by over 200 independent education providers. The independent education providers have increased their market shares over time in terms of the proportion of the total pupil population. Teaching is still largely done in municipal schools, however, in particular in compulsory schools.

There are great variations between the independent schools in different regards. For example, different operational forms are represented among the education providers. The profit-driven limited companies dominate, however, particularly in upper secondary schools. In 2013, 85 per cent of the pupils in independent upper secondary schools attended schools run by limited companies. The corresponding proportion in the independent compulsory schools was 66 per cent. The proportion in compulsory schools is bigger in urban municipalities than in more rural municipalities, but the differences between cities and rural areas decreased between 2009 and 2013. At national level, the number of pupils is fairly evenly distributed according to the operational forms of cooperative, non-profit association and foundation in compulsory schools. For upper secondary schools, it is also relatively common with foundations, which have a market share of approximately 10 per cent of all pupils in independent upper secondary schools.

Of all the independent compulsory schools, 30 per cent are owned by a group. This corresponds to a type of activity that includes more than 40,000 pupils, though this is no more than 4 per cent of all compulsory school pupils. In compulsory schools, approximately two-thirds of all schools are group schools and, together, they have almost 60,000 pupils. This corresponds to 17 per cent of all pupils in upper secondary schools. The proportion of pupils in company schools fell between 2011 and 2013.

Concentration in a few education providers and owners

More than one-third of pupils in Sweden's independent upper secondary schools attend a school that belongs to one of the ten biggest *education providers* in this type of school. The proportion is as big in compulsory schools in 2013. This proportion is the lowest since 2009 for upper secondary schools but it has increased in compulsory schools since 2009, from 28 to 36 per cent. The number of pupils has increased by almost 19,000 in compulsory schools run by the ten biggest education providers between 2009 and 2013. This corresponds to an increase of almost 70 per cent, which is comparable to the increase in the number of pupils in all independent compulsory schools of just over 30 per cent.

The proportion of pupils in independent schools that belong to the ten biggest *owners* has been higher in upper secondary schools than in compulsory schools between 2009 and 2013. Just over half of all pupils in independent upper secondary schools attend schools that belong to the biggest groups in Sweden. In compulsory schools, this proportion is half as big: approximately a quarter of all pupils. The owner concentration is therefore higher in upper secondary schools and compulsory schools, while the concentration of pupils for the biggest education providers is as high for compulsory schools as for upper secondary schools.

The report shows the biggest education providers and owners, but there is one actor that has a completely dominating position, the group AcadeMedia AB. In 2013, about 38,000 pupils attended one of the group's compulsory schools or upper secondary schools. In upper secondary schools, it is the biggest actor in Sweden, with more pupils than in the municipal upper secondary schools in the Municipality of Stockholm (Sweden's biggest municipal education provider). The group is also one of Sweden's biggest actors in compulsory schools. For example, more pupils attend AcadeMedia's compulsory schools than those run by Sweden's fourth biggest municipal education provider of compulsory schools, the Municipality of Uppsala. The group is also bigger than Sweden's biggest independent education provider in compulsory schools, Internationella Engelska Skolan i Sverige AB, in terms of number of pupils in 2013. The report shows that AcadeMedia AB is also the biggest private actor in preschools, in terms of number of independent preschools.

Saturated market?

The Agency confirmed in the report Enskilda huvudmän och skolmarknadens ägarstrukturer (Independent education providers and ownership structures in the school market) that alongside the diversity of independent education providers and independent schools, the concentration in education on offer has increased to a few big actors during the period 2005–2009.[85] This description is still valid with regard to growth during the period 2009–2013, especially in compulsory schools. For upper secondary schools, the growth between 2011 and 2013 has led to less space for many of the big actors as well as for the education providers applying to establish new education programmes and upper secondary schools. This is explained by, inter alia, the falling pupil populations and the increasing competitive pressure. The fact that it is the big education providers that have lost most pupils in relative terms may be due to the debate in recent years on profit-driven school companies, in particular, the school groups having been criticised in mass media and, in one case, having gone into liquidation. This may have had a general, negative effect on the big companies and groups in the school sector in terms of their attractiveness to pupils and parents. For the independent schools in general, it may have led to more pupils than before not choosing these schools for fear they may close down.

One conclusion that can be drawn from the development described above is that the upper secondary school market appears to be saturated in many municipalities.[86] It is an expected development that a market that is opened to free establishment is first characterised by a diversity of actors entering the market. After the initial expansion, the opportunities to take further market shares decrease, whereby the big actors buy up the small ones. This way, there is a merger of companies and activities, and this is in no way unique to the school sector.[87] There has been parallel development by the municipal education providers. They cooperate to a high extent, or belong to upper secondary school associations, to manage the increasing competition and swings in pupil populations. This is reflected in, inter alia, the existence of the upper secondary school markets described in the report. It remains to be seen which direction the development will take during the years of falling pupil populations in upper secondary schools that are due according to the forecasts and what kinds of actors will win and lose market shares as a result of this.

85. Swedish National Agency for Education (2012), *Enskilda huvudmän och skolmarknadens ägarstrukturer*, pp. 61–62.
86. Swedish Schools Inspectorate (2013), *Beslut om ansökningar att starta fristående skola – läsåret 2014/15*, p. 3.
87. The financial term for this is consolidation or large-scale operation.

It also remains to be seen how the actors in compulsory schools will handle the expansion potential that an increasing number of pupils will lead to in this type of school in the coming years. There are conditions for the proportion of pupils in independent compulsory schools to increase further and for the trend to hold in terms of the increased importance of big actors. The market is not yet as saturated in compulsory schools as in upper secondary schools, which is witnessed by, inter alia, the growth in the proportion of pupils in compulsory schools run by limited companies outside metropolitan and urban areas. It is also to be expected that the owner concentration will increase more than that of pupils to a few independent education providers, i.e. that groups will grow at the expense of education providers.

Continued growth of the kind described above can be expected, but it is not certain that it will be as extensive as for upper secondary schools. This is because the actors assess the profitability and development potential of the activities in compulsive schools. In this regard, the Education Act with provisions for more equivalent conditions between all education providers or the increased demands on education providers that apply to start a school may play a role. This may influence the independent education providers' conditions in the long term, in compulsory schools as well as upper secondary schools.

Less diversity?

In previous studies, the Agency has shown that since the right to choose school and the independent school reforms of the 1990s, pupils have had greater opportunities to choose between different options and schools and that a growing number of independent schools with different characters have been established.[88] In light of this, the question can be asked if the growth in recent years of the big education providers and groups has led to less diversity in the education system. If and when such diversity (different education providers and forms of operation) is threatened is hard to judge however.[89] Diversity is a means to meet the needs for more available options for pupils and parents. A slower pace of expansion in establishing independent schools and of the big actors' activities may indicate that the alternatives to municipal schools and small education providers demanded by pupils and parents have been met.

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88. Swedish National Agency for Education, *En bild av skolmarknaden. Syntes av Skolverkets skolmarknadsprojekt,* p. 10.
89. Diversity is largely about options in terms of education programmes and pedagogic methods. This probably controls the choices of pupils and parents more than whether the school is run as a limited company or association, or whether it is municipal or independent. It has not been possible to map the existence of different education programmes and pedagogic methods in this report however.

One expression of diversity in the school market is that independent schools are run with different operational forms. This mapping shows that one operational form, the limited company, has primarily come to dominate (at least in compulsory schools and upper secondary schools). Even though the many limited companies differ and have different conditions, it is primarily this operational form that has been debated based on education quality.[90] The aim of the limited company form is to distribute profit to the shareowners, but decisions on how the profits should be used are taken at the annual general meeting.[91] The main principle of the aim of the company form is also only stated indirectly in the Companies Act (2005:551). This means that the aim of the activity can be adjusted in the articles of association, through a communication that the financial surplus shall be fully or partly reinvested in the activities.[92] There is also a special form of limited company with special limitations on profit distributions.[93] A financial surplus can arise in all activities regardless of the operational form. For example, the aim of cooperatives is to promote the association members' financial interests. The positive and negative effects of different forms of operation on schools and the Swedish welfare sector in general are currently being investigated by the Inquiry on owner assessment.[94]

When control is left to policy and the market

The Agency has previously confirmed that one of the challenges facing schools is making the policy and marketing forces that control schools pull in the same direction.[95] According to the Education Act, it is the job of schools to provide all pupils with equal access to education irrespective of geographic domicile and social and economic conditions and to offer equivalent education.[96] Competition between education providers and schools in the school market aims to increase choice for pupils and parents. The market also creates differences, for example, in terms of the actors' conditions to run their activities.

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90. The Independent School Committee's assessment is that independent schools should be able to make a profit but that there are reasons to change the regulatory framework so that it is clear that profit should always be consistent with the requirement of good quality. The Independent School Committee (SOU 2013:56), *Friskolorna i samhället*, p. 16.
91. The profit can be distributed fully or in part to the shareowners, or be reinvested in the activity and used for, for example, investments.
92. Chap. 3, para. 2, of the Companies Act (2005:551).
93. Chap. 32, para. 1, of the Companies Act (2005:551).
94. Dir. 2012:131, *Ägarprövning och mångfald vid offentligt finansierade välfärdstjänster*. See also the Independent School Committee, *Friskolorna i samhället* (SOU 2013:56).
95. Swedish National Agency for Education (2011), *Skolverkets lägesbedömning 2011. Del 2 – Bedömningar och slutsatser*, p. 74.
96. Chap. 1, paras. 8–9, of the Education Act (2010:800).

Collective ownership of many schools in, for example, a group means that the consequences of liquidation can be much greater than if the risks are spread over more and smaller owners and education providers. The Agency has therefore already pointed out the need to review how differences brought about by the system of school choice are compatible with increased equivalence with the aim of schools developing into good schools.[97] It is important that the state continues to follow up the consequences of the right to choose school and the establishment and closing down of schools.[98]

In recent years, the state has adapted its control to a more diversified school system. This has included creating more equal conditions in the Education Act for preschools, schools and education providers that differ. Furthermore, the Swedish Schools Inspectorate has been given more powerful tools, for example, through more stringent requirements for education providers that apply to start a compulsory school or upper secondary school. The Agency also shares the Independent School Committee's view that the suitability of the education provider as the well the owner should be assessed when approving an independent education provider and also for a change of owner. [99]

In light of the ownership structures that have been described in the report and the fact that they have changed fast during the period 2009–2013, a number of questions have been raised. Which owners and holding companies – or parts of a group – should be assessed when an education provider applies to start a new education programme or when the education provider changes owner? What relationship does an owner or holding company need to have to the school activity in order to be considered for an assessment? If the roles between an owner and a holding company are unclear, how should these boundary problems be handled in an assessment? What is the relationship between the owner and the education provider and how does it affect the accountability that comes with being an education provider of a school?[100]

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97. Dir. 2012:131, *Ägarprövning och mångfald vid offentligt finansierade välfärdstjänster. S*ee also the Independent School Committee, *Friskolorna i samhället* (SOU 2013:56).
98. Swedish National Agency for Education (2013), *Yttrande över Friskolekommitténs betänkande: Friskolorna i samhället* (SOU 2013:56), p. 2.
99. Swedish National Agency for Education (2013), *Yttrande över Friskolekommitténs betänkande: Friskolorna i samhället* (SOU 2013:56).
100. The question is relevant for public as well as independent education providers. The fact that there are unclear points in the way the education providers' assignment is dealt with by municipal education providers is shown in the Swedish National Agency for Education (2011), *Kommunalt huvudmannaskap i praktiken. En kvalitativ studie.*

Different schools, different pupils

A large number of schools and education providers will particularly favour pupils and parents who make an active and well-informed education choice. Special efforts are therefore needed to make such choices possible also for groups that need the information most: those who lack experience of the Swedish education system and whose knowledge of the Swedish language is limited (for example, recently arrived pupils and their families), and those who are not used to sifting through the range of available education (for example, pupils in families without study skills).[101]

There are also systematic differences between education providers in terms of, for example, participation in national education efforts: big education providers take part more often than small ones and municipal education providers more often than independent ones. Efforts therefore need to be formulated and directed to reach all education providers.[102] For such efforts to be effective, it is important for those who direct the efforts and those at whom they are directed to be clear about who is responsible for the education providers in a municipality, company or organisation.

The Agency supports the proposals from the Independent School Committee with regard to assessing the suitability of independent education providers in applications for new education and the suitability of actors with significant influence over the education provider's activity. The Agency also deems that a new assessment should be conducted if the education provider changes owner, not just when an independent school changes education provider. This is particularly important from an equivalence perspective for education providers and owners of independent schools for pupils with special needs, according to Chap. 10, para. 35, and Chap. 15, para. 33, of the Education Act (2010:800). For these pupils, stability and long-termness of education are particularly important. This report presents some of these education providers and owners for compulsory schools. Some of these actors should, through economies of scale, have greater potential to free the resources needed for this group of pupils than small actors have. As mentioned above, however, these education providers and owners ought to be assessed to ensure that the owners also have a long-term aim for their activity.

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101. Swedish National Agency for Education (2012), *En bild av skolmarknaden. Syntes av Skolverkets skolmarknadsprojekt*, pp. 13–14, Swedish National Agency for Education (2011), *Skolverkets lägesbedömning 2011. Del 2 – bedömningar och slutsatser*, pp. 12–13.
102. Swedish National Agency for Education (2011), *Skolverkets lägesbedömning 2011. Del 2 – bedömningar och slutsatser*, p. 12.

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www.skolinspektionen.se/statistik-tillstånd-2014-15

Sweden has more than 2500 independent education providers that run a preschool, compulsory school or upper secondary school. The vast majority of the education providers are small. They run only one preschool or school. At the same time, a relatively high proportion of pupils attend schools that are owned by a small number of limited companies.

This report maps the actors that run or own Sweden's independent preschools and schools. The report shows how many and who the actors are, as well as how they differ in terms of, for example, their size and forms of operation. The report aims to contribute to greater knowledge of the actors on the school market.

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