

Global Welfare States
Political Science 4215G
Winter Term 2024

Dr. Bruce Morrison
SSC 7225; x84937; bmorris2@uwo.ca
Office hours: Thursday 4-5:30, or by appointment

Course Description

As is perhaps to be expected in the case of a complex political phenomenon subjected to intense politicization, the welfare state has been variously interpreted. It is certainly true that the conditions that supported the western welfare state in earlier decades have weakened, if not dissolved, but the meaning of this remains far from clear. As we will see, the welfare state was always plural, deriving from a number of different economic, social, ideological, and institutional sources, and assuming qualitatively different forms in different contexts. There are at least three welfare ‘worlds’ or regimes rather than just one welfare state. Arguably, this number has grown as many countries from the global South have developed substantial and in some respects quite different welfare states. However, in recent decades, demographic change, globalization, and post-industrialization, among other developments, have exerted great pressure on the global welfare states. The case that the established welfare state had become unsustainable or, worse, a hindrance to progress, has supported attempts to challenge or retool welfare states in significant ways. While this might initially have involved retrenchment, more recently it has involved the redirection of state spending toward measures that stand as investments in a more dynamic and competitive society. Are we seeing signs of global convergence in welfare state development? What might this look like? Or are different welfare regimes changing in ways that reflect the distinctiveness of their economic, social, and political settings, as well as the legacies of past policies? This seminar will explore these and other questions by devoting particular attention to processes of welfare state formation and reform in Europe, East Asia, and Latin America.

Course Format

This seminar will be conducted in person. It will involve respectful discussion of a common set of assigned readings and student presentations.

Learning Outcomes

Participants in this seminar will:

- (a) acquire an understanding of the role of the welfare state and the relationship between the welfare state and such key elements of modernity as economic development and state formation
- (b) become able to critically assess the case for the existence of three or more welfare regime types rather than a singular welfare state, and explore the applicability of this framework to a significant number of countries across at least three global regions
- (c) develop the ability to relate welfare regime types to their characteristic policy types
- (d) learn to make sense of and apply the major theories explaining both the emergence and reform of welfare states, and to evaluate the extent to which the retrenchment and/or recasting of welfare states have occurred and may continue to do so.

Prerequisites: Political Science 2245E or 2545F/G, 2231E or 2531F/G, or 2701E or 2704F/G.
Antirequisite: Political Science 4406F/G.

Requirements and Grading

The breakdown of the grade will be as follows:

- (a) presentation (10 minutes): 15%;
- (b) participation: 20%
- (c) midterm take-home exam, due March 3 (8-10 pages): 25%
- (d) final take-home exam, due April 18 (13-16 pages): 40%

Presentation (15%): Students are expected to find one additional journal article or book segment (roughly 20-25 pages) that sheds fresh light on the relevant week's assigned materials. The presentation will involve: (a) elaboration upon the question, thesis, argumentation, and evidence in the selected article; (b) discussion of the major points of contact with one or more of the assigned readings; (c) an attempt to spell out the key analytical implications and bases for criticism; and (d) identification of two discussion questions. The presentations will be timed, in order to make all possible accommodation for the subsequent seminar discussion. Please identify the additional reading by 5 pm on the Tuesday of the presentation week, and then submit slides by 11 am on the Wednesday.

Participation (20%): Students are expected to attend the seminar regularly and be prepared to participate in discussions of the assigned topics and readings. Participation will be assessed based not just on the frequency of the student's contributions, but more fully on the extent to which they are relevant, well-informed, and at the highest level also insightful. Keep in mind that a good question can reveal the extent of a student's preparation, while also contributing to the progress of the seminar discussion. If you find regular participation particularly challenging, please do consult with me for alternative approaches or arrangements.

Mid-Term Take-Home Exam (25%): Students will respond to a series of questions related to the seminar coverage up to that point, while also incorporating one additional reading item (journal article or book segment) that enhances their understanding of the material they are addressing in a significant way. The due date will be March 3, 11:55 pm. **Late penalty:** 2% per day.

Final Take-Home Exam (40%): The format will be similar to that of the first review assignment, but in this case students will incorporate two carefully selected additional research items (journal articles or book segments). As before, one week will be provided for completion of the assignment. The due date will be April 18, 11:55 pm. **Late penalty:** 2% per day, up to one week.

Readings

Week One: Introduction

(January 10)

No assigned readings.

Week Two: Theorizing the Worlds of Welfare

(January 17)

Gosta Esping-Andersen, *The Three Worlds of Welfare Capitalism* (Princeton University Press, 1991), chapters 1-3.

Kees van Kersbergen and Barbara Vis, *Comparative Welfare State Politics: Development, Opportunities, and Reform* (Cambridge, 2014), chapter 3.

Week Three: The Liberal Regime

(January 24)

Kathleen Jones, *The Making of Social Policy in Britain: From the Poor Law to New Labour* (2000), chapters 1, 2, and 5.

David Edgerton, "War and the Development of the British Welfare State," in Herbert Obinger, Klaus Petersen, and Peter Starke, eds., *Warfare and Welfare: Military Conflict and Welfare State Development in Western Countries* (Oxford, 2018).

Theda Skocpol, *Social Policy in the United States: Future Possibilities in Historical Perspective* (Princeton University Press, 1995), chapter 6.

Week Four: The Social Democratic Regime

(January 31)

Bo Rothstein, "Labour-Market Institutions and Working-Class Strength," in Sven Steinmo, Kathleen Thelen, and Frank Longstreth, eds., *Historical Institutionalism in Comparative Analysis* (Cambridge University Press, 1992).

Dmitris Tsarouhas, *Social Democracy in Sweden: The Threat from a Globalized World* (Tauris Academic Studies, 2008), chapter 2.

Pauli Kettunen, "The Nordic Welfare State in Finland." *Scandinavian Journal of History* vol. 26, no. 3 (2001).

Lars Bo Kaspersen, "The Formation and Development of the Welfare State," in John L. Campbell, John A. Hall, and Ove K. Pedersen, eds., *National Identity and the Varieties of Capitalism: The Danish Experience* (DJOF Publishing, 2006), pp. 99-108, 127-30.

Week Five: The Conservative Corporatist Regime

(February 7)

John S. Ambler, ed., *The French Welfare State: Surviving Social and Ideological Change* (New York University Press, 1991), chapters 2 and 5.

Young-Sun Hong, *Welfare, Modernity, and the Weimar State, 1919-1933* (Princeton University Press, 1998), pp. 16-36.

Thomas Paster, "Business and Welfare State Development: Why Did Employers Accept Social Reforms?" *World Politics* vol. 65, no. 3 (July 2013).

Week Six: Taking Stock, Acknowledging New Challenges

(February 14)

Kees van Kersbergen and Barbara Vis, *Comparative Welfare State Politics: Development, Opportunities, and Reform* (Cambridge University Press, 2014), pp. 78-102, 123-55.

Jan Zutavern and Martin Kohli, "Needs and Risks in the Welfare State," in Francis G. Castles, Stephan Leibfried, Jane Lewis, Herbert Obinger, and Christopher Pierson, eds., *The Oxford Handbook of the Welfare State* (Oxford University Press, 2010).

Volker Meier and Martin Werding, "Ageing and the Welfare State: Securing Sustainability." *Oxford Review of Economic Policy* vol. 26, no. 4 (2010), pp. 655-62.

Carl-Ulrik Schierup, "Migration, Minorities and Welfare States," in Christopher Pierson, Francis G. Castles, and Ingela Naumann, eds., *The Welfare State Reader* (Polity, 2014).

****Break:** No session February 21

Week Seven: The New Politics of the Welfare State

(February 28)

Paul Pierson, *Dismantling the Welfare State? Reagan, Thatcher, and the Politics of Retrenchment* (Cambridge University Press, 1994), Introduction, chapters 1 and 2.

Martin Seeleib-Kaiser, "The End of the Conservative German Welfare State Model." *Social Policy and Administration* vol. 50, no. 2 (March 2016).

Barbara Vis, "Taking Stock of the Comparative Literature on the Role of Blame Avoidance Strategies in Social Policy Reform." *Journal of Comparative Policy Analysis* vol. 18, no. 2 (2016).

*****Mid-Term Take-Home Exam Due March 3, 11:55 pm.**

Week Eight: Reform and Reconfiguration

(March 6)

Kees van Kersbergen and Anton Hemerijck, "Two Decades of Change in Europe: The Emergence of the Social Investment State." *Journal of Social Policy* vol. 41, no. 3 (2012).

Kati Kuitto, "From Social Security to Social Investment? Compensating and Social Investment Welfare Policies in a Life-Course Perspective." *Journal of European Social Policy* vol. 26, no. 5 (2016).

Paula Blomqvist and Joakim Palme, "Universalism in Welfare Policy: The Swedish Case beyond 1990." *Social Inclusion* vol. 8, no. 1 (2020).

Giuliani Bonoli, "The Political Economy of Active Labour Market Policy." *Politics & Society* vol. 38, no. 4 (2010).

Jane Gingrich and Silja Hausermann, "The Decline of the Working-Class Vote, the Reconfiguration of the Welfare Support Coalition and Consequences for the Welfare State." *Journal of European Social Policy* vol. 25, no. 1 (2015).

Week Nine: East Asia I: Productivism and South Korea in Comparative Perspective

(March 13)

Ian Holliday, "Productivist Welfare Capitalism: Social Policy in East Asia." *Political Studies* vol. 48 (2000).

Mason MS Kim, *Comparative Welfare Capitalism in East Asia: Productivist Models of Social Policy* (Palgrave, 2016), chapter 2 (18-35), chapter 3 (pp. 46-68), chapter 4.

Niccolo Durazzi, Timo Fleckenstein, and Soohyun Christine Lee, "Social Solidarity for All? Trade Union Strategies, Labor Market Dualization, and the Welfare State in Italy and South Korea." *Politics & Society* vol. 46, no. 2 (2018), pp. 205-10, 218-26 (the rest recommended).

Week Ten: East Asia II: Comparing Japan, Considering Reform

(March 20)

Gregory J. Kasza, "Welfare Policy and War in Japan," in Herbert Obinger, Klaus Petersen, and Peter Starke, eds., *Warfare and Welfare: Military Conflict and Welfare State Development in Western Countries* (Oxford, 2018).

Margarita Estevez-Abe, *Welfare and Capitalism in Postwar Japan* (Cambridge, 2008), chapter 1.

Ito Peng, "The Social Protection Floor and the 'New' Social Investment Policies in Japan and South Korea." *Global Social Policy* vol. 14, no. 3 (2014).

Soohyun Christine Lee, "Democratization, Political Parties and Korean Welfare Politics: Korean Family Policy Reforms in Comparative Perspective." *Government and Opposition* vol. 53, no. 3 (2018).

Week Eleven: Latin America I: Historical Origins and Neoliberalism

(March 27)

Stephan Haggard and Robert R. Kaufman, *Development, Democracy, and Welfare States: Latin America, East Asia, and Eastern Europe* (Princeton University Press, 2008), chapters 1 (pp. 56-59, 69-71 optional) and 2.

Evelyn Huber and John D. Stephens, *Democracy and the Left: Social Policy and Inequality in Latin America* (University of Chicago Press, 2012), chapter 6 (pp. 155-77).

Week Twelve: Latin America II: The Left Turn, Basic Universalism, and the Return of the Right

(April 3)

Huber and Stephens, *Democracy and the Left*, chapter 6 (pp. 177-207).

Candelaria Garay, *Social Policy Expansion in Latin America* (Cambridge, 2016), chapter 1 (pp. 1-20).

Theodoros Papadopoulos and Ricardo Velazquez Leyer, "Two Decades of Social Investment in Latin America: Outcomes, Shortcomings and Achievements of Conditional Cash Transfers." *Social Policy and Society* vol. 15, no. 3 (2016).

Juan Cruz Ferre, "Social Policy Expansion and Segmentation in the First Two Decades of the 21st Century in Latin America." *International Journal of Social Welfare* vol. 32 (2023).

*****Final Take-Home Exam Due April 18, 11:55 pm.**