

The European Welfare State
4406G/9710B
Winter Term, 2017

Professor Bruce Morrison

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Office hours: Tuesday 2-3, Thursday 10-11, 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 and often erroneously interpreted. It is certainly the case that the conditions that supported the 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 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. However, in the face of powerful changes which surfaced during the final third of the twentieth century and into the twenty-first, the argument has been made in many quarters that the welfare state has become unsustainable or, worse, a hindrance to progress. Evaluating such a claim will draw us deeply into the following questions. What contribution, if any, did the welfare state make to the functioning of advanced European economies and polities? Is the welfare state in Europe on the way out, or are the reports of its death greatly exaggerated? Are the pressures for retrenchment directed at the whole of the welfare state, or just at certain of its component parts? Should the welfare state be abandoned, either in whole or in part? Are we seeing a contribution, process of convergence, according to which the welfare regime types will be replaced by a single liberal model? The attempt to treat these questions will also shed light on such related matters as citizenship, ideology, state formation, and economic development.

Learning Outcomes

Participants in this seminar will:

- (a) acquire an understanding of the relationship between the welfare state and the key elements of modernity;
- (b) become able to critically assess the case for the existence of three or more welfare regime types rather than a singular welfare state, as well as the application of this framework to a significant number of countries;
- (c) 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 retrenchment or other forms of change have occurred and may continue to do so.

Assignments and Grading:

In addition to keeping up with the weekly readings, you will be required to provide one substantial presentation and submit two take-home examinations over the course of the term. The presentation and the take-home examinations will require some additional research and reading. I will also expect active, informed, and consistent participation from the members of the seminar. The breakdown of the grade will be as follows:

Undergraduates (4406G):

- (a) presentation (15 minutes): 20%
- (b) seminar participation: 20%
- (c) mid-term take-home exam (8-10 pages): 20%
- (d) final take-home exam (14-16 pages): 40%

Graduate Students (9710B):

- (a) presentation (20 minutes): 15%
- (b) seminar participation: 20%
- (c) mid-term take-home exam (12-14 pages): 15%
- (d) final take-home exam (20-22 pages): 35%
- (e) research and presentation of one additional country case: 15%

Readings

Unit One: Modernity and the Welfare State

(January 18, 25)

Karl Polanyi, *The Great Transformation: The Political and Economic Origins of Our Time* (Beacon Press, 1944), pp. 43-102, 135-50.

T.H. Marshall, "Citizenship and Social Class," in Christopher Pierson, Francis G. Castles, and Ingela K. Naumann (eds.), *The Welfare State Reader* (Polity, 2014).

Kathleen Jones, *The Making of Social Policy in Britain: From the Poor Law to New Labour* (The Athlone Press, 2000), chapters 1, 2, 5, 6.

Christopher Pierson, *Beyond the Welfare State? The New Political Economy of Welfare* (Polity, 2006), pp. 9-40, 49-62.

Unit Two: The Different Welfare Worlds

A. *Theory* (February 1)

Gosta Esping-Andersen, *The Three Worlds of Welfare Capitalism* (Princeton University Press, 1991), chapters 1-3. Graduate students read chapter 4 as well.

Philip Manow, "Workers, Farmers and Catholicism: A History of Political Class Coalitions and the South-European Welfare State Regime." *Journal of European Social Policy* vol. 25, no. 1 (2015).

B. *Social Democratic* (February 8)

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.

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).

Jukka Pekkarinen, "Keynesianism and the Scandinavian Models of Economic Policy," in Peter A. Hall, ed., *The Political Power of Economic Ideas: Keynesianism Across Nations* (Princeton University Press, 1989).

C. *Liberal* (February 15)

Jones, *The Making of Social Policy in Britain*, chapters 7, 9-12.

Theda Skocpol, *Social Policy in the United States: Future Possibilities in Historical Perspective* (Princeton University Press, 1995), chapter 6. Graduate Students read Chapter 3 as well.

Anne Marie Cammisa, *From Rhetoric to Reform? Welfare Policy in American Politics* (Westview Press, 1998), chapter 2.

****Mid-Term Take-Home Exam Due in Class on March 1st.**

D. *Conservative Corporatist*
(March 1)

Douglas E. Ashford, "Advantages of Complexity: Social Insurance in France," in John S. Ambler, ed., *The French Welfare State: Surviving Social and Ideological Change* (New York University Press, 1991).

Remi Lenoir, "Family Policy in France Since 1938," in Ambler, ed., *The French Welfare State*.

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

Christopher S. Allen, "The Underdevelopment of Keynesianism in the Federal Republic of Germany," in Hall, ed., *The Political Power of Economic Ideas*.

Unit Three: Reforming the Welfare States?

A. *Taking Stock, Facing Challenges:*
(March 8)

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 K. Naumann, eds., *The Welfare State Reader* (Polity, 2014).

B. *Neo-conservatism and the Sources of Social and Institutional Resistance*
(March 15)

Christopher Pierson, *Beyond the Welfare State? The New Political Economy of Welfare* (Polity, 2006), pp. 41-49.

Jones, *The Making of Social Policy in Britain*, chapters 13-14.

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

C. *Third Ways, New Ways, No Ways:*
(March 22, 29, April 5)

i. *Vices, Virtues, and Path Dependent Change?*

Jonah Levy, "Vice into Virtue? Progressive Politics and Welfare Reform in Continental Europe." *Politics & Society* vol. 27, no. 2 (June 1999).

Bruno Palier and Kathleen Thelen, "Institutionalizing Dualism: Complementarities and Change in France and Germany." *Politics and Society* vol. 38, no. 1 (2010).

Dimitris Tsarouhas, "A New Swedish Model? Swedish Social Democracy at the Crossroads," in John Callaghan, Nina Fishman, Ben Jackson and Martin McIvor, eds., *In Search of Social Democracy: Responses to Crisis and Modernisation* (Manchester University Press, 2009).

Claes Belfrage and Magnus Ryner, "Renegotiating the Swedish Social Democratic Settlement: From Pension Fund Socialism to Neoliberalization." *Politics and Society* vol. 37, no. 2 (June 2009).

ii. *Convergence or Regeneration as a Social Investment State?*

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).

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

Bea Cantillon and Wim Van Lancker, "Three Shortcomings of the Social Investment Perspective." *Social Policy and Society* vol. 12, no. 4 (2013).

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).

iii. *Parties, Electoral Competition, and Welfare Reform*

Gus Schumacher, "'Marx' or the Market? Intra-Party Power and Social Democratic Welfare State Retrenchment." *West European Politics* vol. 35, no. 5 (September 2012).

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).

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).

Peter Taylor-Gooby, "The Divisive Welfare State." *Social Policy and Administration* vol. 50, no. 6 (November 2016).

****Final Take-Home Exam Due April 26th at 5 pm.**

**APPENDIX TO UNDERGRADUATE COURSE OUTLINES
DEPARTMENT OF POLITICAL SCIENCE**

Prerequisite checking - the student's responsibility

"Unless you have either the requisites for this course or written special permission from your Dean to enroll in it, you may be removed from this course and it will be deleted from your record. This decision may not be appealed. You will receive no adjustment to your fees in the event that you are dropped from a course for failing to have the necessary prerequisites."

Essay course requirements

With the exception of 1000-level courses, most courses in the Department of Political Science are essay courses. Total written assignments (excluding examinations) will be at least 3,000 words in Politics 1020E, at least 5,000 words in a full course numbered 2000 or above, and at least 2,500 words in a half course numbered 2000 or above.

Use of Personal Response Systems ("Clickers")

"Personal Response Systems ("clickers") may be used in some classes. If clickers are to be used in a class, it is the responsibility of the student to ensure that the device is activated and functional. Students must see their instructor if they have any concerns about whether the clicker is malfunctioning.

Students must use only their own clicker. If clicker records are used to compute a portion of the course grade:

- the use of somebody else's clicker in class constitutes a scholastic offence,
- the possession of a clicker belonging to another student will be interpreted as an attempt to commit a scholastic offence."

Security and Confidentiality of Student Work (refer to current *Western Academic Calendar* (<http://www.westerncalendar.uwo.ca/>))

"**Submitting or Returning Student Assignments, Tests and Exams** - All student assignments, tests and exams will be handled in a secure and confidential manner. Particularly in this respect, leaving student work unattended in public areas for pickup is not permitted."

Duplication of work

Undergraduate students who submit similar assignments on closely related topics in two different courses must obtain the consent of both instructors prior to the submission of the assignment. If prior approval is not obtained, each instructor reserves the right not to accept the assignment.

Grade adjustments

In order to ensure that comparable standards are applied in political science courses, the Department may require instructors to adjust final marks to conform to Departmental guidelines.

Academic Offences

"Scholastic offences are taken seriously and students are directed to read the appropriate policy, specifically, the definition of what constitutes a Scholastic Offence, at the following Web site:

http://www.uwo.ca/univsec/pdf/academic_policies/appeals/scholastic_discipline_undergrad.pdf

Submission of Course Requirements

ESSAYS, ASSIGNMENTS, TAKE-HOME EXAMS MUST BE SUBMITTED ACCORDING TO PROCEDURES SPECIFIED BY YOUR INSTRUCTOR (I.E., IN CLASS, DURING OFFICE HOURS, TA'S OFFICE HOURS) OR UNDER THE INSTRUCTOR'S OFFICE DOOR.

THE MAIN OFFICE DOES NOT DATE-STAMP OR ACCEPT ANY OF THE ABOVE.

Attendance Regulations for Examinations

EXAMINATIONS/ATTENDANCE (Sen. Min. Feb.4/49, May 23/58, S.94, S.3538, S.3632, S.04-097) A student is entitled to be examined in courses in which registration is maintained, subject to the following limitations: 1) A student may be debarred from writing the final examination for failure to maintain satisfactory academic standing throughout the year. 2) Any student who, in the opinion of the instructor, is absent too frequently from class or laboratory periods in any course will be reported to the Dean of the Faculty offering the course (after due warning has been given). On the recommendation of the Department concerned, and with the permission of the Dean of that Faculty, the student will be debarred from taking the regular examination in the course. The Dean of the Faculty offering the course will communicate that decision to the Dean of the Faculty of registration.

Medical Policy, Late Assignments, etc.

Students registered in Social Science should refer to

http://counselling.ssc.uwo.ca/procedures/having_problems/index.html for information on Medical Policy, Term Tests, Final Examinations, Late Assignments, Short Absences, Extended Absences, Documentation and other Academic Concerns. Non-Social Science students should refer to their home faculty's academic counselling office.

University Policy on Cheating and Academic Misconduct

Plagiarism: Students must write their essays and assignments in their own words. Whenever students take an idea, or a passage from another author, they must acknowledge their debt both by using quotation marks where appropriate and by proper referencing such as footnotes or citations. Plagiarism is a major academic offence." (see Scholastic Offence Policy in the Western Academic Calendar).

Plagiarism Checking: "All required papers may be subject to submission for textual similarity review to the commercial plagiarism detection software under license to the University for the detection of plagiarism. All papers submitted for such checking will be included as source documents in the reference database for the purpose of detecting plagiarism of papers subsequently submitted to the system. Use of the service is subject to the licensing agreement, currently between The University of Western Ontario and Turnitin.com (<http://www.turnitin.com>)."

Multiple-choice tests/exams: "Computer-marked multiple-choice tests and/or exams may be subject to submission for similarity review by software that will check for unusual coincidences in answer patterns that may indicate cheating."

Note: Information excerpted and quoted above are Senate regulations from the Handbook of Scholarship and Academic Policy. http://www.uwo.ca/univsec/academic_policies/index.html

PLAGIARISM*

In writing scholarly papers, you must keep firmly in mind the need to avoid plagiarism. Plagiarism is the unacknowledged borrowing of another writer's words or ideas. Different forms of writing require different types of acknowledgement. The following rules pertain to the acknowledgements necessary in academic papers.

A. In using another writer's words, you must both place the words in quotation marks and acknowledge that the words are those of another writer.

You are plagiarizing if you use a sequence of words, a sentence or a paragraph taken from other writers without acknowledging them to be theirs. Acknowledgement is indicated either by (1) mentioning the author and work from which the words are borrowed in the text of your paper; or by (2) placing a footnote number at the end of the quotation in your text, and including a correspondingly numbered footnote at the bottom of the page (or in a separate reference section at the end of your essay). This footnote should indicate author, title of the work, place and date of publication, and page number.

Method (2) given above is usually preferable for academic essays because it provides the reader with more information about your sources and leaves your text uncluttered with parenthetical and tangential references. In either case words taken from another author must be enclosed in quotation marks or set off from your text by single spacing and indentation in such a way that they cannot be mistaken for your own words. Note that you cannot avoid indicating quotation simply by changing a word or phrase in a sentence or paragraph which is not your own.

B. In adopting other writers' ideas, you must acknowledge that they are theirs.

You are plagiarizing if you adopt, summarize, or paraphrase other writers' trains of argument, ideas or sequences of ideas without acknowledging their authorship according to the method of acknowledgement given in 'A' above. Since the words are your own, they need not be enclosed in quotation marks. Be certain, however, that the words you use are entirely your own; where you must use words or phrases from your source, these should be enclosed in quotation marks, as in 'A' above.

Clearly, it is possible for you to formulate arguments or ideas independently of another writer who has expounded the same ideas, and whom you have not read. Where you got your ideas is the important consideration here. Do not be afraid to present an argument or idea without acknowledgement to another writer, if you have arrived at it entirely independently. Acknowledge it if you have derived it from a source outside your own thinking on the subject.

In short, use of acknowledgements and, when necessary, quotation marks is necessary to distinguish clearly between what is yours and what is not. Since the rules have been explained to you, if you fail to make this distinction your instructor very likely will do so for you, and they will be forced to regard your omission as intentional literary theft. Plagiarism is a serious offence which may result in a student's receiving an 'F' in a course or, in extreme cases in their suspension from the University.

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Adopted by the council of the Faculty of Social Science, October, 1970; approved by the Dept. of History August 13, 1991

Accessibility at Western: Please contact poliscie@uwo.ca if you require any information in plain text format, or if any other accommodation can make the course material and/or physical space accessible to you.

SUPPORT SERVICES

The Registrar's office can be accessed for Student Support Services at <http://www.registrar.uwo.ca>

Student Support Services (including the services provided by the USC listed here) can be reached at:
<http://westernusc.ca/services/>

Student Development Services can be reached at: <http://www.sdc.uwo.ca/>

Students who are in emotional/mental distress should refer to Mental Health@Western
<http://www.uwo.ca/uwocom/mentalhealth/> for a complete list of options about how to obtain help.