

Global Welfare States
Political Science 4215F
Fall 2021

Professor Bruce Morrison
SSC 4137; x84937; bmorris2@uwo.ca
Office hours: Tuesday 2-3 on Zoom 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 be a pleasure to see you all in seminar every week! I do, however, reserve the right to move the course online should circumstances require it.

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 2231E.

Antirequisite: Political Science 4406G.

Requirements and Grading:

The breakdown of the grade will be as follows:

- (a) presentation (10 minutes): 15%;
- (b) participation: 20%
- (c) first take home exam, due October 27 (8-10 pages): 25%
- (d) second take home exam, due December 17 (14-16 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.

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. Any student who fails to attend at least **nine** sessions without cause may not be permitted to submit the final take home exam.

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. One week will be provided for completion of this assignment. The due date will be October 27.

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 December 16.

Readings

Introduction

(September 8)

No assigned readings.

Week One: Theorizing the Worlds of Welfare

(September 15)

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 Two: The Liberal Regime

(September 22)

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 Three: The Social Democratic Regime

(September 29)

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).

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

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).

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 Four: The Conservative Corporatist Regime

(October 6)

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 Five: Taking Stock, Facing New Challenges

(October 13)

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).

Week Six: The New Politics of the Welfare State

(October 20)

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).

Week Seven: Mid-Term Take Home Exam

(October 27)

The exam will be due on October 27 at 11:55 pm. There are no new assigned course readings for this week.

**Break week (November 3)

Week Eight: Reform and Reconfiguration

(November 10)

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).

Kees van Kersbergen and Jonas Kraft, "De-universalization and Selective Social Investment in Scandinavia?" in Anton Hemerijck, ed., *The Uses of Social Investment* (Oxford University Press, 2017).

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

(November 17)

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 and Considering Reform

(November 24)

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

(December 1)

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.

Evelyne 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 and Basic Universalism

(December 8)

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).

Sara Niedzwiecki and Jennifer Pribble, "Social Policies and Center-Right Governments in Argentina and Chile." *Latin American Politics and Society* vol. 59, no. 3 (September 2017).

***Final Take Home Exam Due Thursday, December 16 at 11:55 pm.