

**Global Welfare States  
Political Science 4215G  
Winter Term 2026**

Dr. Bruce Morrison  
SSC 7225; x84937; [bmorris2@uwo.ca](mailto: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 supporting 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 emphasize probing and 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 or recasting of welfare states has occurred and may continue.

**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) mid-term take-home exam, due February 24th, with flexibility until February 26th (8-10 pages): 25%
- (d) a three-hour final exam, during formal exam period: 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 9 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. Questions will be provided at least one week ahead of the due date. The due date will be February 24<sup>th</sup>, 11:59 pm, with flexibility to February 26<sup>th</sup>, 11:59 pm. **Late penalty:** 2% per day.

**Final Exam (40%):** The exam will take place during the formal exam period. Students will address a series of questions both exploring the second part of the course and reflecting comparatively on the various welfare worlds studied this term. More details and guidance will be provided.

## Readings

### **Week One: Introduction**

(January 7)

No assigned readings.

### **Week Two: Theorizing the Worlds of Welfare**

(January 14)

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 21)

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 28)

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).

Evelyn Huber and John D. Stephens, *Development and Crisis of the Welfare State: Parties and Policies in Global Markets* (University of Chicago Press, 2001), pp. 131-44.

### **Week Five: The Conservative Corporatist Regime**

(February 4)

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 11)

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.

Diane Sainsbury, "Immigrants and Social Rights in Comparative Perspective: Welfare Regimes, Forms of Immigration, and Immigration Policy Regimes." *Journal of European Social Policy* vol. 16, no. 3 (2006): 229-44.

**\*\*Break Week:** No session February 18

### **Week Seven: Midterm Take-Home Exam**

(February 25)

### **Week Eight: The New Politics of the Welfare State**

(March 4)

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

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).

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

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

### **Week Nine: Reform and Reconfiguration**

(March 11)

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).

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).

Donato Di Carlo, Anton Hemerijck, and Johannes Karremans, "The Continental Social Investment Turn: Sequencing Corrective and Transformative Welfare State Change in the Netherlands, Germany, and Italy." *Politics & Society* vol. 53, no. 1 (2025).

Marius R. Busemeyer, Philip Rathgeb, and Alexander HJ Sahm, "Authoritarian Values and the Welfare State: The Social Policy Preferences of Radical Right Voters." *West European Politics* vol. 45, no. 1 (2022): 77-101 (read pp. 77-85, skim the rest).

### **Week Ten: East Asia I: Productivism and South Korea in Comparative Perspective**

(March 18)

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 Eleven: East Asia II: Comparing Japan, Considering Reform**

(March 25)

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).

Soo Hyun 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 Twelve: Latin America I: Historical Origins and Neoliberalism**

(April 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.

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 Thirteen: Latin America II: The Left Turn, Basic Universalism, and the Return of the Right**

(April 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).

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