

# Contemporary Welfare States in Europe

The optional course for master degree students of social policy and social work, Faculty of Social Studies, Masaryk University, Brno.

Guest students from partner universities (Socrates-Erasmus programme) are allowed to participate.

In case of free capacity students from other fields of study from Masaryk University may be accepted.

Maximum of 20 students in the course.

**Lecturers:** Tomáš Sirovátka, Masaryk University (tutor), Steven Saxonberg (Dalarna University and University of Uppsala SWE)

**Room:**

**First (Autumn) Semester, 12 credits**

**Finality of the course:**

- to learn how welfare states in Europe cope with the most recent challenges of the dynamics of (post)industrial society
- to learn to understand the alternative options in policy choices, analyse the links between the social, economic and political context, policy solutions, and impacts of the policies accepted
- to develop capacity of students to do a comparative analysis of social policies.

**Requirements:**

students are supposed to submit a paper about 3.000 words, in English, on the selected topic (comparative study of the particular field of social policy).

The topic should be selected from the specific topics included into the programme.

Each paper should focus on the specific question related to the topic selected by the student.

Contents: goal of the study, background, methodology (research questions, central hypotheses, aspects and criteria of comparison, indicators, data, their validity...), presentation of the results, conclusions, references.

Students are allowed to discuss the proposal of their paper (about 3 pages) with the lecturers through e-mail.

**Exam procedure:**

The supervisor of the paper will examine the paper and will ask the questions to be responded by the student through e-mail within one week and then will suggest the mark which should be confirmed by the tutor of the course.

## **Procedure:**

### **1. Selection of the topic for the seminar paper:**

30 11 2003, short paper two-three pages (goal of the study, background, methodology - research questions, central hypotheses, aspects and criteria of comparison, indicators, data, their validity, references) to be sent to the relevant professor

### **2. Final draft**

10 01 2004 final draft of the paper – submission date to the relevant professor as well as to the tutor

### **3. Additional requirements**

20 01 evaluation, additional comment and requirements of the professors

### **4. Additional supplements, answers to the questions**

05 02 2004 supplements or answers to professors

### **5. Final evaluation**

12 02 2004 final results

## **Schedule:**

Tomas Sirovatka

Week 1 Challenges faced by the contemporary welfare states and their consequences – social, economic, impacts on the welfare state:

globalisation, economic pressures, (post)industrial labour markets, demographic changes, family, new faces of social inequality, value shifts

- H. Hecló : Toward a New Welfare State ? In : Flora P., Heidenheimer A.J. : The Development of Welfare States in Europe and America. London : Transaction Publishers 1990, s. 383-406.
- Kvist, J, Jaeger, M.M. 2002. Up for the Challenge ? The Danish National Institute for Social Research, draft.
- G. Esping-Andersen : After the Golden Age ? Welfare State Dilemmas in a Global Economy. In : G. Esping-Andersen : Welfare States in Transition. Sage 1997, s. 1-31.

Week 2 Tomas Sirovatka

2. Discussion about the notion of welfare state crisis and about the capacity of different welfare regimes to cope with the new challenges. Classical welfare state typology (Esping-Andersen) in terms of de-commodification, impacts on social structure, relation to the family, labour market. New variants of the regimes (Southern Europe, Post-communist countries) ? Similar and specific problems of the regimes, specific solutions, newest developments.

- G. Esping-Andersen: *Social Foundations of Postindustrial Economies*. Oxford Univ. Press 1999, s. 73-94, 146-169.
- R.E. Goodin, B. Headey, R. Muffels, H.-J. Dirven. *The Real Worlds of Welfare Capitalism*. Cambridge Univ. Press 1999. s. 237-264.

### Week 3 Tomas Sirovatka

#### 3 Methodological workshop:

- a) seminar papers – purpose, topics, structure, method
- b) how to approach comparative studies of the welfare state

### Week 4 Tomas Sirovatka

#### 4 Social assistance, poverty alleviation, social inclusion

The role of social assistance in contemporary welfare state: new risks, new poverty, social exclusion. The models of the welfare state and the models of social assistance. The key features of social assistance schemes and their administration. Recipients of social assistance. New forms of social assistance. Effectiveness and ineffectiveness of social assistance.

- I. Gough, J. Bradshaw, J. Dutch, T. Eardley, P. Whiteford : *Social Assistance in OECD Countries*. *European Journal of Social Policy*, 1, 1997, 17-44.
- Saraceno, Ch. (ed) 2002. *Social Assistance Dynamics in Europe. National and Local Poverty Regimes*. Bristol: The Policy Press, pp. 81-119, 127-137, 235-258.
- Sainsbury, D., Morissens, A. “Poverty in the Mid-1990s: the Effectiveness of Means-tested Benefits” *Journal of European Social Policy*, 12 (4): 307-327.

#### **Seminar paper questions:**

Compare what are the distinctive features of social assistance in different welfare states. how these features influence the effects of these schemes on poverty alleviation ?

### Week 5 Tomáš Sirovátka

#### 5 European Employment Strategy in EU countries

Welfare States as employment and unemployment regimes, European Employment Strategy, leading policies, different approaches; activation policies in different countries.

- Gallie D., Paugam S. *Welfare Regimes and the Experience of Unemployment in Europe*. Oxford Univ. Press 2000, s. 1 – 21.
- Madsen, P.K., Munch/Madsen, P. 2001. „European Employment Policy and National Policy Regimes“ pp. 255-276. in Mayes D.G., J. Brghman, R. Salais (eds.) *Social Exclusion and European Policy*. Cheltenham: Edward Elgar.
- Lodemel I., Trickey H. 2000. *An Offer You Can't Refuse* Bristol: The Policy Press, pp. 1-

**Seminar paper questions:**

Compare how different welfare states apply European Employment Strategy – what achievements does it imply ?

Week 6 Tomas Sirovatka

6 Social insurance, mainly pension systems reforms

The problem of ageing and its consequences. Current developments of pension schemes. The challenges for the pension schemes, dilemmas. Parametric and paradigm solutions. The emerging models, the factors influencing solutions.

- A. Espina : Reform of pension schemes in the OECD countries. *International Labour Review*, 1996, no 2., s. 181 - 208.
- Muller, K. 2002. Beyond Privatization: "Pension Reform in the Czech Republic and Slovenia." *Journal of European Social Policy*, 12 (4): 293-306.
- J. Myles A New Social Contract for the Elderly ? Pp.130-172 **in** Esping Andersen, G., Gallie, D., Hemerijck, A. a J. Myles 2002. *Why We Need a New Welfare State? A New Welfare Architecture for Europe*. Oxford: Oxford University Press.

**Seminar paper question:**

What are the main options for pension reforms in different welfare states ? What factors influence the choices ?

Week 7 Tomáš Sirovátka

7 'Legitimacy of welfare policies'

The legitimacy of redistributive policies has two aspects:

- do people endorse the degree and ways of gathering the necessary resources for redistribution: this is about individual contributions to collective goals, which is an issue of solidarity
- do people endorse the degree and ways in which the collective resources are distributed: this is about wider principles of redistributive justice, but also about the public's perception of the deservingness of needy groups

In this lecture we will discuss the results of public opinion studies on solidarity and deservingness.

Lecture 7:

Oorschot, W. van (2000) 'Who should get what, and why' in: *Policy and Politics*, vol.28, nr. 1,

pp. 33-49

Sirovátka, T., van Oorschot, W., Rabušic, L. 2002. *Welfare State Solidarity and Support: Czech Republic Compared with the Netherlands*. Pp. 147-169 in Townsend, P., Gordon D. (eds): World Poverty. New Policies To Defeat An Old Enemy. Bristol: The Polity Press.

Sirovátka, T., Valentová, M. 2002. Legitimita redistribuce: ČR v mezinárodním srovnání. Finance a úvěr 51 (1): 23-35. English version of the paper will be send to the students.

### **Questions for seminar papers:**

1. Assuming that public support for a social security scheme has an influence on whether policymakers can cutback on it, discuss which type of scheme would be most resilient against 'attacks' from economizing politicians: means-tested schemes, social insurance schemes, universal schemes?
2. Discuss the problem of the ageing of European populations from the perspective of inter-generational solidarity. Under what kind of pension system will problems be worse: pay-as-you-go or capital funded?

Week 8 Tomas Sirovatka

8 Methodological seminar

Week 9 Steven Saxonberg

9 Family policy

Lecture: Genderizing Welfare States. Debates on Typologies.

The lecture takes up the feminist critique of traditional welfare typologies and discusses alternative typologies. It discusses why feminists consider family policy to be so important and why they believe the traditional focus on the labor market does not fully capture the logic of different welfare regimes.

10 Family policy

Seminar: Family Policy in Western Europe

For this seminar we will discuss the differences in family policy among West European countries, the reasons for these differences and the influence they have on gender relations.

11 Family policy

Seminar: Family Policy under Post-Communism

This seminar emphasizes the special role that the communist legacy has on shaping family policies in Central and Eastern Europe. Special emphasis will also be placed on the population crisis.

Literature to the topics: 9-11

Čermáková, Marie. 1997. "Postavení žen na trhu práce," *Sociologický časopis*, 33, no. 4:389-404

Dale, Mary, 1994. "Comparing Welfare States: Towards a Gender Friendly approach." Pp. 101-

117 in *Gendering Welfare States*, Diane Sainsbury ed. London: Sage.

Ellingsæter, Anne Lise, 1998. "Dual Breadwinner Societies: Provider Models in the Scandinavian Welfare States," *Acta Sociologica*, 41, No. 1.

Ferge, Zsuzsa, 1997b. "Women and Social Transformation in Central-Eastern Europe," *Czech Sociological Review*, vol. V, nr. 2, 1997

Gornick, Janet C., Marcia K. Meyers and Katherin E. Ross, 1997. "Supporting the Employment of Mothers: Policy Variation Across Fourteen Welfare State," *Journal of European Social Policy*, vol. 7, no. 1, 1997.

Lewis, Jane, 1997. "Gender and Welfare Regimes: Further Thoughts," *Social Politics*, summer, 1997.

Saxonberg, Steven, 2003. *The Czech Republic Before the New Millennium* (East European Monographs/Columbia University Press,) especially chapter 5.

Siaroff, Alan, 1994. "Work Welfare and Gender Equality: A New Typology." Pp. 118-131 in , *Gendering Welfare States*, Diane Sainsbury ed. London: Sage.

### **Seminar paper question:**

"Analyze some aspect of family policy in a particular country(ies) and try to explain WHY the country adapted this particular policy, but not another and explain how you believe this policy influences gender relations."

### **Overview of literature**

#### **General issues:**

- H. Heclø : Toward a New Welfare State ? In : Flora P., Heidenheimer A.J. : The Development of Welfare States in Europe and America. London : Transaction Publishers 1990, s. 383-406.
- G. Esping-Andersen : After the Golden Age ? Welfare State Dilemmas in a Global Economy. In : G. Esping-Andersen : Welfare States in Transition. Sage 1997, s. 1-31.
- G. Esping-Andersen: Social Foundations of Postindustrial Economies. Oxford Univ.Press 1999, s. 73-94, 146-169.
- J. Myles A New Social Contract for the Elderly ? Pp.130-172 in Esping Andersen, G., Gallie, D., Hemerijck, A. a J. Myles 2002. Why We Need a New Welfare State? A New Welfare Architecture for Europe. Oxford: Oxford University Press.
- R.E. Goodin, B. Headey, R. Muffels, H.-J. Dirven. The Real Worlds of Welfare Capitalism. Cambridge Univ. Press 1999. s. 237-264.
- Kvist, J, Jaeger, M.M. 2002. Up for the Challenge ? The Danish National Institute for Social Research, draft.

### Supplements for the selected topics:

- A. Espina : Reform of pension schemes in the OECD countries. *International Labour Review*, 1996, no 2., s. 181 - 208.
- Muller, K. 2002. Beyond Privatization: "Pension Reform in the Czech Republic and Slovenia." *Journal of European Social Policy*, 12 (4): 293-306.
- Gallie D., Paugam S. *Welfare Regimes and the Experience of Unemployment in Europe*. Oxford Univ. Press 2000, s. 1 – 21.
- Madsen, P.K., Munch/Madsen, P. 2001. „European Employment Policy and National Policy Regimes“ pp. 255-276. in Mayes D.G., J. Brghman, R. Salais (eds.) *Social Exclusion and European Policy*. Cheltenham: Edward Elgar.
- Lodemel I., Trickey H. 2000. *An Offer You Can't Refuse* Bristol: The Policy Press, pp. 1-39.
- I. Gough, J. Bradshaw, J. Dutch, T. Eardley, P. Whiteford : *Social Assistance in OECD Countries*. *European Journal of Social Policy*, 1, 1997, 17-44.
- Saraceno, Ch. (ed) 2002. *Social Assistance Dynamics in Europe. National and Local Poverty Regimes*. Bristol: The Policy Press, pp. 81-119, 127-137, 235-258.
- Sainsbury, D., Morissens, A. "Poverty in the Mid-1990s: the Effectiveness of Means-tested Benefits" *Journal of European Social Policy*, 12 (4): 307-327.
- Oorschot, W. van (2003) 'On the cultural analysis of social policy', working paper, Tilburg University (to be provided later)
- Clasen, J. and W. van Oorschot (2002) 'Changing principles in European social security', in: *European Journal of Social Security*, vol. 4, nr. 2, pp. 89-116
- Oorschot, W. van (2000) 'Who should get what, and why' in: *Policy and Politics*, vol.28, nr. 1, pp. 33-49
- Sirovátka, T., van Oorschot, W., Rabušic, L. 2002. "Welfare State Solidarity and Support: Czech Republic Compared with the Netherlands". Pp. 147-169 in Townsend, P., Gordon D. (eds): *World Poverty. New Policies To Defeat An Old Enemy*. Bristol: The Polity Press.
- Oorschot, W. van (2002) 'Individual motives for contributing to welfare benefits in the Netherlands', in: *Policy and Politics* , vol. 30, nr. 1, pp. 31-46
- Oorschot, W. van (2003) 'Different welfare states, different social commitments? Evidence form the 1999/2000 wave of the European Values Study', working paper, Tilburg University
- Cermáková, Marie. 1997. "Postavení žen na trhu práce," *Sociologický časopis*, 33, no. 4:389-404

- Dale, Mary, 1994. "Comparing Welfare States: Towards a Gender Friendly approach." Pp. 101-117 in *Gendering Welfare States*, Diane Sainsbury ed. London: Sage.
- Ellingsæter, Anne Lise, 1998. "Dual Breadwinner Societies: Provider Models in the Scandinavian Welfare States," *Acta Sociologica*, 41, No. 1.
- Ferge, Zsuzsa, 1997b. "Women and Social Transformation in Central-Eastern Europe," *Czech Sociological Review*, vol. V, nr. 2, 1997
- Gornick, Janet C., Marcia K. Meyers and Katherin E. Ross, 1997. "Supporting the Employment of Mothers: Policy Variation Across Fourteen Welfare State," *Journal of European Social Policy*, vol. 7, no. 1, 1997.
- Lewis, Jane, 1997. "Gender and Welfare Regimes: Further Thoughts," *Social Politics*, summer, 1997.
- Saxonberg, Steven, 2003. *The Czech Republic Before the New Millennium* (East European Monographs/Columbia University Press,) especially chapter 5.
- Siaroff, Alan, 1994. "Work Welfare and Gender Equality: A New Typology." Pp. 118-131 in , *Gendering Welfare States*, Diane Sainsbury ed. London: Sage.

[www.europa.eu.int](http://www.europa.eu.int) (for example see MISSOC about the description of social security systems, European employment strategy etc.)

[www.ilo.org](http://www.ilo.org)

[www.oecd.org](http://www.oecd.org)

[www.ssa.gov](http://www.ssa.gov)