

## **Contemporary social policy problems in European welfare states**

### **Number of ECTS credits allocated**

12 credits

### **Name of lecturer(s)**

prof. PhDr. Tomáš Sirovátka, CSc. (lecturer)

**Opava 3 října?** Posun do 19 prosince asi možný

### **Learning outcomes of the course unit**

The goal of the course is

1. To advance the knowledge about
  - the societal functions, goals and principles of social policy (e.g. equality, security, social justice, social rights)
  - the factors that influence development of welfare states
  - the strategy and instruments of social policy (universalism/selectivism, redistribution, public services, etc.)
  - outcomes and impacts of social policy: achievement of goals, legitimacy, side-effects.
2. The students will learn about the key aspects (objectives, instruments, effects) of current developments in European welfare states in selected policy fields (family policy, pension reforms, employment policy, social assistance).
3. The students will improve their analytical skills in order to understand the links between the various levels/aspects of social policy mentioned above. They will develop the ability of the creative application of their theoretical, methodological and merit knowledge gained in the other courses within analysis, evaluation and preparation of the policies aimed to solve the current problems of social policy in Europe.

Learning outcomes: at the end of the course the student is able - to identify key dilemmas solved in social policy today - to formulate criteria along which the approach to these dilemmas would be assessed - operationalize suitable indicators to these criteria - to assess policies in different fields - to formulate and argue on own solutions of solving the dilemmas.

### **Course Contents**

#### **Introductory lecture (19 September):**

The aim and contents of the course, expectations, the programme of work, tasks for the students

#### **Part I General perspectives of the European welfare states**

## **Lecture 1 (3 October)**

### **1. The societal functions and goals of social policy**

1.1 Social policy and (post)modern society: core societal functions of social policy.

Social policy as social choice.

Objectives of social policy - and possible choices of the objectives, the hierarchy of the objectives. Core objectives, instrumental objectives (economic, administrative). The tensions and conflicts among the objectives.

*Barr N., Whynes D.: Current Issues in the Economics of Welfare. Houndmills, Basingstoke, Hampshire, London: Macmillan, 1993, Introduction, pp. 4-6.*

1.2 Social justice and social policy

The notion of social justice, the theories: libertarians, utilitarians, liberals, Rawls and critiques, cultural theories, justice as freedom

*BARR, N. The Economics of The Welfare State. Stanford Univ. Press, 1993, pp. 44-69.*

*Gass B.: Expanding the Concept of Social Justice : Implications for Social Security, in Sociology of Social Security. Edinburgh: Edinburgh University Press, 1991, pp. 16-21.*

*Sen, A. Inequality Re-examined. Oxford, New York, Russel Sage Foundation, Clarendon Press, 1992, pp. 31-42.*

*Sen, A. Development as Freedom 1999, Oxford Univ. Press, pp. 87-90.*

## **Lecture 2 (10 October)**

### **2. Social forces which influence social policy**

2.1 The factors that influenced development of welfare states, and the process

Modernization, mass democracy, social forces (classes, groups, categories) and social policy

Theory of social citizenship, The sector model of development of the welfare state.

*Heidenheimer A.J and Flora P. (eds.): The Development of the Welfare States in Europe and America. New Brunswick, New Jersey: Transaction Books, 1981 (1982, 1990), pp. 37-45.*

*Baldwin P. : Politics of Social Solidarity. Cambridge: Cambridge Univ. Press 1990, pp. 23-31.*

2.2 Ideology, political actors and social policy

The key choices in social policy (residualism-institutionalism, selectivity-universalism, horizontal equality-vertical equality)

The linkages among the policy objectives, the policy instruments – and the choices

Pros and cons of the specific techniques - the instruments in achieving social and economic objectives

*Bryson L.: Welfare and The State. London: Macmillan 1992, pp. 55-68.*

*Oppenheim C. : The Welfare State : Putting the Record Straight. London: Poverty Publication, Child Poverty Action Group 1994, pp. 16-19.*

### **Lecture 3 (17 October)**

#### **3. Impact of social policy on social structure - social policy as redistribution of risks and resources within society, social policy as access to social rights**

3.1 Welfare states as systems of social stratification, welfare systems as labour market regimes, welfare states and family

Concepts: decommodification, defamilialization

The linkages among the objectives, the principles and the instruments of social policy used in the welfare regimes

The three welfare regimes (their characteristics) or more ?

*Esping - Andersen, G. : The Three Worlds of Welfare Capitalism. Cambridge: Polity Press, 1990, pp. 21-34.*

*Esping - Andersen, G. : The Social Foundations of Postindustrial Economics. Cambridge: Polity Press, 1999, pp. 36-46.*

*Esping - Andersen, G. : The Incomplete Revolution. Cambridge: Polity Press, 2009, pp. 79-85, 104-110.*

### **Lecture 4 (24 October)**

3.2 Impacts of social policy in (post)modern society  
Rationality and effectiveness of public/social policy

The impacts of social policy on different social groups/classes: higher, middle, upper class, the trends and the causes

The general criteria of assessing the rationality of public policy (in objectives and instruments used): legitimacy, effectiveness, and cost efficiency

Specific approaches: poverty/inequality reduction effectiveness, the factors that influence effectiveness

*Hill, M. : Social Policy. A Comparative Analysis. New York : Prentice Hall, 1996, pp. 258-268.*

*Ringen S. : The Possibility of Politics. Oxford University Press, 1987, pp. 20-27.*

### **Seminar 1 (31 October):**

Discussion of the general perspectives

## **Part II – Current problems in the selected areas of social policy in European welfare states**

Each topic is discussed in the aspects: 1 General aspects. Ethical choices. 2 Analysis and evaluation of the existing and suggested solutions.

### **Lecture 5 (7 November)**

Pension reform – the dilemmas and the solutions to the problem of ageing in the pension system in the EU countries

The trends in the reforms of the pension systems and the reasons behind

The ethical dilemmas associated with the reforms and the choices: intergenerational justice, vertical justice, gender aspects – policy objectives

How the reform measures affect the achievement of the policy objectives

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.

European Commission (2015) *The 2015 Pension Adequacy Report: current and future income adequacy in old age in the EU* (Brussels: EC), pp. 169-184.

OECD (2015) *Pensions at a Glance* (Paris: OECD), pp. 15-43 (Chapter 1).

### **Lecture 6 (14 November)**

Employment policy – the challenges in the contemporary labour markets and the employment regimes

Employment regimes in Europe, the criteria how to distinguish the employment regimes.

Contemporary trends in the employment regimes, activation reforms: their substance.

The associated governance reforms: individualization, decentralization, marketization, new public management, networks, coordination and integration.

The modes of governance and the trends in Europe, the effects of governance reforms in the labour market in the context of the crisis.

Gallie D., Paugam S. *Welfare Regimes and the Experience of Unemployment in Europe*. Oxford Univ. Press 2000, Introduction: The debate, pp.1-21.

Van Berkel, R. W. de Graaf, T., Sirovátka, T. 2011. The Governance of Active Welfare States. Pp. 1-21, in: The Governance of Active Welfare States in Europe. Houndmills, Basingstoke: Palgrave, Macmillan.

G. Bonoli 2011. Active labour market policies in a changing economic contexts 2011, (Ch 16), in. Clasen, J. and Clegg, D. Regulating the risk of unemployment, Oxford University Press.

Lødemel, Ivar and Moreira, Amílcar (eds) (2014) *Activation or Workfare? Governance and the Neo-Liberal Convergence*, (Oxford: Oxford University Press), chapter 11, pp. 289-327.

## **Lecture 7 (21 November)**

Family policy: the contemporary challenges and family regimes in Europe

Contemporary trends and changes of family: composition, family behavior, factors that influence family behavior and social policy. The changes during two demographic transitions and the causes.

Family policy regimes – their objectives and instruments used. The problem of work-family combination and effective solutions. Impacts on the fertility and well-being.

Castles, F.G. 2003. "The world turned upside down: below replacement fertility, changing preferences and family-friendly public policy in 21 OECD countries." *Journal of European Social Policy* 13 (3): 209-227.

Leitner, S. (2003), 'Varieties of Familialism. The caring function of the family in comparative perspective.' *European Societies* 5(4), pp. 353-375.

Saxonberg, S., Sirovátka, T. 2006 Failing Family Policy in Post-Communist Central Europe. *Journal of Comparative Policy Analysis* 8 (2): 189-206.

Saraceno, Chiara and Keck, Wolfgang (2011) "Towards an integrated approach for the analysis of gender equity in policies supporting paid work and care responsibilities", *Demographic research*, Vol. 25, pp. 371-406.

## **Lecture 8 (28 November)**

Social assistance, services and social inclusion: the variety in the poverty profiles and the policies to alleviate it

The problem of poverty and social exclusion in Europe: the causes and the symptoms. The groups the most affected, their composition.

Social assistance systems as the institutional filters in shaping the profile of social assistance recipients. The social assistance regimes in Europe – their profile and their impacts on

alleviating poverty, material deprivation and social exclusion.

The trends – welfare dependency and activation breaking the cycle of disadvantage, social investment approach.

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.

Wang, Jinxian and Van Vliet, Olaf (2016) “Social Assistance and Minimum Income Benefits: Benefit Levels, Replacement Rates and Policies across 26 OECD Countries, 1990–2009“, *European Journal of Social Security*, Vol.18, no. 4, pp. 333-355.

Beyond the literature listed above, other sources will be recommended depending on the topic of the seminar papers.

**Seminar 2 (5 December):** discussion of the seminar papers

**Seminar 3 (12 December):** discussion of the seminar papers

### **Planned learning activities and teaching methods**

Literature and tasks imposed on the students. Presentations of the tasks on the seminar, discussion. Feedback on seminar papers.

The students are expected to submit a seminar paper by the end of the course to assessment.

One paper up to 7,000 words: assessment of the selected social policy measures that will include the three parts: 1 The objective of assessment, theoretical and methodological background, operationalization 2 Assessment based on data and coming from part 1, 3 Own proposals for policy changes, based on part 2.

### **Assessment methods and criteria**

control of home tasks for the seminars

assessment of seminar papers

## **EXAM**

### **For part 1**

**Written examination: answering two open questions (maximum is 15 points for 1 question)**

### **For part 2**

**Seminar paper (maximum is 70 points)**

**Students have to achieve 66 points for passing.**

**65 and less F (failed)**

**66-72 E**

**73-79 D**

**80-86 C**

**87-93 B**

**94-100 A**