

Contemporary Welfare States

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

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

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

Maximum of 14 students in the course.

Tutors: Tomáš Sirovátka, Masaryk University, invited professors

First (Autumn) Semester, 12 credits

Finality of the course:

- to learn how welfare states, the European ones in particular, cope with the most recent challenges emerging from the dynamics of (post)industrial society - how these challenges arise in the old EU - member states as well as in the new (post-communist) member states
- to consider the policy choices, to analyse the links between the social, economic and political context and accepted policy solutions, as well as the impacts of the policies implemented
- to develop the skills to conduct a comparative analysis of social policies.

Requirements:

1 seminar paper

students are supposed to submit a paper about 3.500-4.000 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, the question - problem would be specified by students themselves.

Contents of the paper: 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 expected to submit the proposal/outline of their paper (about 3 pages) before they will start drafting the paper. The outline should deal with the goal of the paper and research question, theoretical background, methodology.

The supervisor - tutor will examine the paper and will raise the questions to be responded by the students in the complementary note to the paper.

After receiving the complementary notes from students the tutor will close evaluation. In specific cases oral examination will be required if suggested by tutor.

Procedure:

1. Selection of the topic for the seminar paper:

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

comments received by students within one week

2. Final draft

5 01 2004 final draft of the paper – submission date to the tutor

3. Additional requirements

15 01 evaluation, requirements on complementary notes

4. Additional supplements, answers to the questions

01 02 2004 complementary note

5. Final evaluation

09 02 2004 final results

2 readings - selected texts and presentation of comments on the seminars

each student is expected to make a presentation and comments to one of the texts suggested as selected readings

seminars (organisation):

- the topic will be introduced by teacher
- then the students will present the seminar readings and discussion about the texts and issues suggested follows
- the texts are presented by an appointed student (each student is expected to present at least one paper during a course)
- all students are expected to read the texts in advance and to be prepared to discussion

Schedule:

Week 1

Introductory seminar - organisation of the programme

Week 2

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

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

readings suggested (the students are required to read at least one of the two papers suggested depending on their own choice)

- **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.**
- **Ferge Z.: "The Changed Welfare Paradigm : The Individualization of the Social." *Social Policy and Administration*, Vol. 31, No. 1, March : pp. 20-44, 1997.**

further readings

- 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.
- Offe C. 1996. "The Politics of Social Policy in East European Transitions : Antecedents, Agents, and Agenda of the Reform." In: *Modernity and the State. East, West*. Cambridge: Polity Press, pp. 225-253. See also *Social Research* Vol. 60. No. 4, pp. 649-684 (Winter 1993).

seminar paper questions: what are the core challenges and core dilemmas faced by contemporary welfare states ? how are they associated with the newest societal changes ? what are the new social risks ?

Week 3

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

readings suggested

G. Esping-Andersen: Social Foundations of Postindustrial Economies. Oxford Univ.Press 1999, s. 73-94, 146-169.

Journal of European Social Policy 2005. Vol. 14, No 3. Special Issue: *EU Enlargement, Europeanization and Social Policy*. (particularly pp. 233-252: Ferge Z., Juhász G. "Accession and social policy: the case of Hungary", pp. 253 - 266 Potůček M. "Accession and social policy: the case of the Czech republic".)

further readings

R.E. Goodin, B. Headey, R. Muffels, H.-J. Dirven. *The Real Worlds of Welfare Capitalism*. Cambridge Univ. Press 1999. s. 237-264.

Standing G. : *Social Protection in Central and Eastern Europe : A Tale of Slipping Anchors and Torn Safety Nets*. In : *G. Esping- Andersen : Welfare States in Transition*. London, N. York, Sage 1996, pp. 225-255.

seminar paper questions: how differently are the core challenges and core dilemmas responded in various WS regimes ? what are the differences in the WS developments in the West and East Europe ?

Week 4

3 Methodological workshop:

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

Week 5

4 Family policy

Genderizing Welfare States. Debates on Typologies.

Feminist critique of traditional welfare typologies and discusses alternative typologies.

Differences in family policy among West European countries, the reasons for these differences and the influence they have on gender relations. Family Policy under Post-Communism

seminar suggested readings

Leitner, S. 2003, “Varieties of familialism. The caring function of the family in comparative perspective.” *European Societies* 5 (4): 353-375.

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

further readings

Daly, Mary, 1994. “Comparing Welfare States: Towards a Gender Friendly approach.” Pp. 101-117 in *Gendering Welfare States*, Diane Sainsbury ed. London: Sage.

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

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.

Week 6

5 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.

readings suggested

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.

further readings

I. Gough, J. Bradshaw, J. Dutch, T. Eardley, P. Whiteford : Social Assistance in OECD Countries. European Journal of Social Policy, 1, 1997, 17-44.

OECD: *The Battle Against Exclusion. Vol. 2. Social Assistance in Belgium, the Czech Republic, the Netherlands and Norway.* Paris, OECD 1998, pp. 41-58, 176-187.

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 7

6 European Employment Strategy in EU countries

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

readings suggested

Gallie D., Paugam S. Welfare Regimes and the Experience of Unemployment in Europe. Oxford Univ. Press 2000, s. 1 – 21.

Sirovátka T. 2005. Individual approach in activation policy in the Czech Republic. English version of the paper published in the Netherlands, Italy and Czech Republic.

further readings:

Madsen, P.K., Munch/Madsen, P. 2001. „European Employment Policy and National Policy Regimes“ pp. 255-276. in Mayes D.G., J. Berghman, 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.

Nesporova, A.: *Employment and Labour Market Policies in Transition Economies*. Geneva: International Labour Office, 1999.

Seminar paper questions:

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

Week 8

7 Social insurance - 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.

readings suggested

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.

Muller, K. 2002. Beyond Privatization: “Pension Reform in the Czech Republic and Slovenia.” Journal of European Social Policy, 12 (4): 293-306.

further readings

A. Espina : Reform of pension schemes in the OECD countries. International Labour Review, 1996, no 2., s. 181 - 208.

Seminar paper question:

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

Week 9

8 'Legitimacy of welfare polices'

The legitimacy of redistributive policies include 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

suggested readings:

Oorschot, W. van (2000) 'Who should get what, and why' in: *Policy and Politics*, vol.28, nr. 1, pp. 33-49

Sirovátka, T., 2002. Opinions of Czechs about the Welfare State. *Czech Sociological Review*, vol. 38 (3): 327-344.

further readings

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.

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 10

9 Methodological seminar - discussion about papers under work - difficult points

Weeks 11 - 13 **FREE** for working on the papers

useful web sites

www.europa.eu.int (for example see MISSOC - description of social security systems, European employment strategy etc.)

www.ilo.org

www.oecd.org

www.ssa.gov