

## **CONTEMPORARY SOCIAL POLICY IN THE EUROPEAN UNION**

### ***Aims***

An examination and analysis of the 'European' characterisation, and context, of the development of European Union social policy, leading to assessment of the degree of Europeanisation of European Union social policy.

### ***Objectives***

Initially, the historical development of European Union social policy will be examined within the context of the growth in importance of social policy areas in the E.U. integration project. Against that background the course will move on to identify and characterise models of welfare in European states, as well as four typologies of European welfare states. The principles and concepts of harmonisation, mutual recognition, and convergence which shape and condition E.U. social policy will then be defined and examined. These will then be employed in two case studies of European Union social policy areas – welfare and labour mobility. Finally, definition and assessment of the degree of general Europeanisation of social policy will be undertaken within the context of the previous aspects and elements of the course, and in particular in terms of comparison with the characteristics of the types of European welfare states identified in the course.

### ***Structure of the course***

The course will be taught through a series of 6 lectures and 2 workshops.

### **Course programme:**

***PLEASE NOTE: 90% attendance at lectures (i.e. at least 5) and 100% attendance at both workshops is a requirement to pass the course (see Course Assessment on page 3)***

***The powerpoint presentations for each lecture will be placed on the Masaryk University Information System prior to each lecture***

***All classes will take place in Room U53 from 14.00***

### **Course programme:**

- 16.10.13. 14.00. Lecture 1. The historical development of E.U. social policy
- 23.10.13. 14.00. Lecture 2. Models of welfare in European states: 'old' and 'new' convergence
- 30.10.13 14.00. Lecture 3. Four types of European welfare states: Conservative Corporatist, Social Democratic, Anglo-Saxon, and the Mediterranean model.
- 06.11.13 14.00. Lecture 4. The principles and concepts of E.U. social policy – harmonisation, mutual recognition, cohesion and convergence

- 13.11.13 14.00. Lecture 5. Two case studies: a) European Union welfare policy  
 b) Labour mobility and the European Union
- 20.11.13 14.00. Workshop 1 (see below)
- 27.11.13 14.00. Lecture 6. The Europeanisation of social policy?
- 04.12.13. 14.00. Workshop 2 (see below)

**Workshop programme:**

**PLEASE NOTE:**

- a) 100% attendance at the 2 workshops is a requirement to pass the course (see Course Assessment on page 3)**
- b) Students will be expected to have read for each workshop and participate. Indicative readings are given below for each workshop**

**20.11.13 Workshop 1:** This will consist of student participation and discussion groups.

*Question:* Is harmonisation, mutual recognition, or convergence the best principle upon which European Union social policy should be based? Provide reasons and evidence for your preference.

*Readings:*

- Borros, S. and Greve, B. (2004) The Open Method of Co-ordination in the European Union, special issue of *Journal of European Public Policy*, 11:2 (various articles of interest)
- Duina, F. and Raunio, T. (2007) 'The open method of co-ordination and national parliaments: further marginalization or new opportunities?' *Journal of European Public Policy*, 14:4, pp.489-506.
- Falkner, G. Trieb, O. Hartlapp, M. & Lieber, S. (eds.) *Complying with Europe. E.U. Harmonisation and Soft Law in the Member States*, Cambridge, Cambridge Univ. Press, 2005
- Geyer, R. *Exploring European Social Policy*, Cambridge, Polity Press, 2000.
- Guillen, A. and Palier, B. (2004) 'Does Europe matter? Accession to EU and social policy developments in recent and new member states', *Journal of European Social Policy*, 14:3, pp.203-209, and other articles in this special issue on *EU Enlargement, Europeanisation and Social Policy*.
- Hantrais, L. *Social Policy in the EU*, Basingstoke, Macmillan, 2007 (Third edition) (or Second edition, 2000).
- Jepsen, M. and Pascual, A.S. (2005) 'The European Social Model: an exercise in deconstruction', *Journal of European Social Policy*, 15(3), pp.231-245.
- Journal of European Public Policy*, Vol.14, no.5, 2007. (Special issue: Mutual Recognition as a New Mode of Governance)
- Roberts, I. and Springer, B. *Social Policy in the European Union: Between Harmonisation and National Autonomy*, Boulder, Lynne Reiner, 2001.

- Room, G. (2007) 'Challenges facing the E.U.: Scope for a coherent response', *European Societies*, Vol. 9, No. 2, pp.229-244.
- Sinn, H-W and Ochel, W (2003) 'Social Union, convergence and migration', *Journal of Common Market Studies*, 41, pp.869-96.
- Threlfall, M. (2003) 'European social integration: harmonization, convergence and the single social area', *Journal of European Social Policy*, 13, pp.121-140.
- Wallace, H. Wallace, W. and Pollack, M. A. *Policy Making in the European Union* (5th edition), Oxford, Oxford University Press, 2005.

**04.12.13 Workshop 2:** In this final workshop there will be discussion, and some direction offered, in respect of the assessment essay.

### ***Course Assessment***

- a) **Attendance:** 90% attendance at lectures (at least 5) and 100% attendance at the 2 workshops is a requirement to pass this course.
- b) **Essay** (maximum 2000 words/6 sides of A4 paper)

***Deadline: Friday 13 December 2013. To be submitted by email to me at [jitaly25@hotmail.com](mailto:jitaly25@hotmail.com) or through the Masaryk University Information System.***

Students will be required to submit an essay in answer to ***one*** of the questions shown below. The essay must be of ***a maximum of 2,000 words***, be typewritten, fully properly referenced, and include a full bibliography.

***PLEASE NOTE: Essays that are more than 10 per cent above or below the word limit will be penalised through the deduction of marks***

- (i) What elements and processes can be identified in order to suggest that overall we are witnessing a process of Europeanisation of social policy? Provide evidence and examples drawn from E.U. social policy areas to support your assessment.
- (ii) Are models and types of European welfare states useful in identifying the impact of the European Union on welfare and social policy provision within the E.U. Member States?.

### ***Texts***

Students are referred below to a range of journal, book and internet texts. These may be added to within the lectures, and if so, sources will be included within the lecture powerpoint presentations placed on the Information System prior to each lecture.

### ***Books***

Hantrais provides a useful introductory overview, and is useful for a range of E.U. social policy areas covered in the course. Kleinman addresses some broader issues concerning the role of social policy in the E.U. Kleinman (Ch.7) also examines the pressures created for EU social policy by rising levels of unemployment and changes in Labour Market policies. Richardson (Ch.3) examines 'Europeanisation' and the E.U.

social policy process (Ch.13). Featherstone and Radaelli also examine 'Europeanisation'.

- Castles, F. *The Future of the Welfare State*, Oxford, Oxford University Press, 2004.
- Falkner, G. Trieb, O. Hartlapp, M. & Lieber, S. (eds.) *Complying with Europe. E.U. Harmonisation and Soft Law in the Member States*, Cambridge, Cambridge Univ. Press, 2005
- Featherstone, K. and Radaelli, C. (eds.) *The Politics of Europeanization*, Oxford, Oxford University Press, 2003.
- Gallie, D. (ed.) *Resisting marginalisation: Unemployment experience and social policy in the EU*, Oxford, Oxford University Press, 2004.
- Geyer, R. *Exploring European Social Policy*, Cambridge, Polity Press, 2000.
- Hantrais, L. *Social Policy in the EU*, Basingstoke, Macmillan, 2007 (Third edition) (or Second edition, 2000).
- Jones, C. (ed.) *New Perspectives on the Welfare State in Europe*, London, Routledge, 1993 (especially Liebfried, S. 'Towards a European Welfare State?')
- Kleinman, M. *A European Welfare State: European Union Social Policy in context*, Basingstoke, Palgrave, 2002.
- McCormick, J. *Understanding the European Union* (Third Edition), Basingstoke, Palgrave, 2005.
- Richardson, J. (ed.) *European Union. Power and policy-making* (Third edition), Oxford, Routledge, 2006. (or Second Edition, 2001)
- Roberts, I. and Springer, B. *Social Policy in the European Union: Between Harmonisation and National Autonomy*, Boulder, Lynne Reiner, 2001.
- Salais, R. and Villeneuve, R. (eds.) *Europe and the politics of capabilities*, New York, Cambridge University Press, 2004
- Schimmelfennig, F. and Sedelmeier, U.. (eds.) *The Europeanisation of Central and Eastern Europe*, Ithaca NY, Cornell University Press, 2005.
- Wallace, H. Wallace, W. and Pollack, M. A. *Policy Making in the European Union* (5th edition), Oxford, Oxford University Press, 2005.

### **Journal Articles**

- Aysan, M. F. and Beaujot, R. (2009) 'Welfare Regimes for Ageing populations: No Single Path for Reform', *Population and Development Review*, Vol. 35, No. 4, pp.701-720.
- Begg, I. and Nectoux, F. (1995) 'Social protection and economic union', *Journal of European Social Policy*, 5, pp.285-302.
- Borros, S. and Greve, B. (2004) The Open Method of Co-ordination in the European Union, special issue of *Journal of European Public Policy*, 11:2 (various articles of interest)
- Cunliffe, A. and Wilton, J. (2006) The Development of a European Asylum Policy in an Expanded European Union, *Migration Online*, May 2006 ([www.migrationonline.cz/studies.shtml](http://www.migrationonline.cz/studies.shtml))
- Duina, F. and Raunio, T. (2007) 'The open method of co-ordination and national parliaments: further marginalization or new opportunities?' *Journal of European Public Policy*, 14:4, pp.489-506.
- Guillen, A. and Palier, B. (2004) 'Does Europe matter? Accession to EU and social policy developments in recent and new member states', *Journal of European Social Policy*, 14:3, pp.203-209, and other articles in this special issue on *EU Enlargement, Europeanisation and Social Policy*.

- Hansen, M.P. and Triantafyllou, P. (2011) 'The Lisbon strategy and the alignment of economic and social concerns', in *Journal of European Social Policy*, Vol. 21, no.3, July, pp.197-209.
- Jepsen, M. and Pascual, A.S. (2005) 'The European Social Model: an exercise in deconstruction', *Journal of European Social Policy*, 15(3), pp.231-245.
- Journal of European Public Policy*, Vol.14, no.5, 2007. (Special issue: Mutual Recognition as a New Mode of Governance)
- Mosher, J. and Trubek, D. (2003) 'Alternative approaches to governance in the EU: EU Social Policy and the European Employment Strategy', *Journal of Common Market Studies*, 4:1, pp.63-88.
- Neilson, J. (1998) 'Equal opportunities for women in the European Union: success or failure?', *Journal of European Social Policy*, 8, pp.64-79.
- Room, G. (2007) 'Challenges facing the E.U.: Scope for a coherent response', *European Societies*, Vol. 9, No. 2, pp.229-244.
- Sinn, H-W and Ochel, W (2003) 'Social Union, convergence and migration', *Journal of Common Market Studies*, 41, pp.869-96.
- Threlfall, M. (2003) 'European social integration: harmonization, convergence and the single social area', *Journal of European Social Policy*, 13, pp.121-140.
- Van der Mei (2003) 'Freedom of movement for the unemployed and co-ordination of unemployment benefit schemes', *European Journal of Social Security*, 5:3, pp.214-229.
- Van Vliet, O. and Koster, F. (2011) 'Europeanisation and the political economy of active labour market policies', in *European Union Politics*, Vol.12, no.2, June, pp.217-240.
- Vobruba, G. (2003) 'The enlargement crisis of the European Union: limits of the dialectics of integration and expansion', *Journal of European Social Policy*, 13 (1), pp.35-48, and responses by M. Bach and M. Rhodes.
- Walkenhorst, H. (2008) 'Explaining change in EU education policy', *Journal of European Public Policy*, Vol.14, No. 4, June 2008, pp. 567-587.
- Warleigh-Lack, A. and Drachenberg, R. (2011) 'Spillover in a soft policy era? Evidence from the Open Method of Co-ordination in education and training', in *Journal of European Public Policy*, Vol.18, no 7, pp.999-1015.

### **Journals**

European Union Politics

European Political Science

Journal of Common Market Studies

Journal of European Social Policy (the 'European Briefing' section of this journal is very useful for up-to-date EU developments)

Journal of European Public Policy

Migration Online ([www.migrationonline.cz/studies.shtml](http://www.migrationonline.cz/studies.shtml))

### **Internet**

<http://www.cec.org.uk>

<http://www.ecsa.org>

<http://europa.eu.int>

<http://ibeurope.eu.int>

<http://www.ieep.org.uk>

<http://www.policylibrary.com>

John Wilton  
17.08.2013