Objective of the Course

The comparative analysis of social policies, programmes and institutions helps us understand why, how and to what extent nations deal with important social problems and issues. The aim of the course is to provide students with a clear idea of the diversity of European social policies, of their historical and political origins, and to allow for the assessment of their performance. The course will also provide an in-depth account of current welfare reforms, in light of their historical development. Important social science analysis concepts (de-/re-commodification, path dependency...) will also be used in order to understand the issues at stake in recent debates concerning the welfare state and the trajectories of their reforms.

The following key questions structure the course:

- Why did we need the welfare state in the first place?
- How did we get the (different types of) welfare state?
- What are the main effects of welfare states?
- Why do we need to reform the welfare state?
- What new welfare state do we need and how do we get it?

Summary

Since World War II, Welfare States have become a crucial element of modern Western societies, giving rise to new forms of citizenship and constituting a major element in the policy-making process of the Nation-state. The emergence and the institutionalization of Welfare States were indeed the main dynamic behind the expansion of the State throughout the growth era that characterized the post-war period until the mid-1970s in most Western countries. From the 1980s, many politicians and analysts started to view the retrenchment of social policies as an economic and political necessity. The aging of the population, the globalization process and the development of normative critiques against public policies paved the way for deep welfare state reforms in many countries. However, starting in the late 1990s, new visions for the Welfare systems have been put forward around the notion of social investment and especially investment in human capital, and which seek to address both the economic and social needs of post-industrial societies.

The course will focus on these dynamics and, more precisely, will analyse why Welfare State reforms are such prominent issues. It will seek to identify the vulnerabilities and assets that various forms of welfare systems experience, to analyse the different forms of policies that have been conducted during the past few years and to discuss the justifications and the perspectives that animate the political debate today. Is the globalization process a dynamics that systematically has a negative impact on domestic social policies? Can new social policies become an economic asset in the global competition? How are different countries dealing with the ageing of the population? Is the political debate still dominated by neoliberal arguments, or is it possible to identify new diagnoses and new propositions that provide a new role for the Welfare State?
The course will start with a historical and institutional overview of the various ways welfare systems have developed and been organised in the Western world. It will then analyse the changes in the social, economic and political contexts that undermine traditional welfare systems. This will lead to an analysis of the various trends of reforms that have been implemented to cope with demographic, economic and social difficulties, studying in particular pension and health care reforms as well as policies aimed at coping with new social risks. Finally, this course will end with a general discussion of the new architecture currently proposed for welfare systems in a globalised post-industrial world.

Organisation of the Course

- **Session 1: The European origins of the welfare state**
  The national welfare states have common roots and have historically responded to similar challenges. The nation state was made to assume responsibility for the social protection of its citizens, social protection responded to the common challenge posed by the advent of a capitalist economy, and societal demands for social programs were voiced through the channels of liberal democracy. This session will highlight the common sources (nation state, capitalism, liberal democracy) behind the West European welfare state as well as the factors that structured the main differences between them.
  Required Readings:
  Assignment for this session:
  - Prepare the following question for discussion: What are the main cleavages structuring the differences in the development of the welfare states?

- **Session 2: The diversity of welfare models.**
  A prominent strand in the comparative welfare state literature has argued that the remarkable diversity and institutional variation among welfare states is not only due to the different timing of the national revolution, the industrial revolution and the extension of the suffrage, but has its roots in different political class coalitions, which have led to three distinct welfare regimes: a social-democratic (Nordic) welfare state regime, a liberal (Anglo-Saxon) welfare state regime and a conservative (continental) welfare state regime. This session will also examine the debates around the regime approach in the comparative welfare state literature.
  Required Readings:
  Assignment for this session:
  - Prepare the following questions for discussion: What are the central values of each welfare regime? Is clustering welfare systems meaningful?
• **Session 3: Gender, social citizenship and welfare state regimes.**
  
  relations have been conceptualised and institutionalized in different welfare states. We will also discuss how the gendered critique of mainstream accounts of the welfare state has contributed to refining our understanding of the welfare state.

Required readings:


Assignment for this session:

- Prepare the following question for discussion: In what ways and to what extent do the analyses presented by Lewis and by Orloff call into question mainstream welfare state typologies?

• **Session 4: Principles of redistribution and strategies of equality**
  
  This session will address the different modes of redistribution of the welfare state and discuss cross-country differences in terms of redistributive ambitions and strategies of equality. This session will also address the role of institutions on interest formation, on the political legitimacy of the welfare state and on its redistributive outcomes.

Required Readings:

- *Just institutions matter: The moral and political logic of the universal welfare state*. (pp. 144-70).

Assignment for this session:

- Prepare the following question for discussion: Should the state redistribute? If so, how? How can one account for redistributive preferences across the different welfare states? Are some groups more deserving of state redistribution than others?

• **Session 5: The crises of the welfare state**
  
  While the post-war period was characterized by a rapid expansion of the welfare state, the mid-1970s marked the beginning of the crisis of the welfare state. While generally portrayed as a financial crisis, it is just as much an ideological crisis with the role and scope of the welfare state being severely called into question, not least by the new dominant neo-liberal ideology. Globalisation is also understood as setting new pressures on welfare states to retrench and converge. While welfare state scholarship initially focused on retrenchment, it increasingly turned towards trying to account for the strong resilience of welfare states.

Required reading:


Assignment for this session:

- Prepare the following question for discussion: What are the pressures for retrenchment and convergence of welfare states, and what are the factors of resilience?
• Session 6: The three worlds of welfare state reforms

In recent years, many studies have analysed the reforms implemented in welfare systems. The basic common answer to the challenges facing the welfare states, more detailed analysis has shown that there have been three main paths of reforms, each of them corresponding to the main welfare regimes identified before. Indeed, it appears that the various welfare regimes do not show the same types or levels of vulnerability in light of the new socio-economic contexts and they have also chosen various paths of reforms.

Required readings:

- PALIER, Bruno (2004), 'Social Protection Reforms in Europe: Various National Strategies for a New Social Model' for CPRN Project F-82, Seeking a Social


Assignment for this session:

- Prepare the following question for discussion: What are the main causes of differences in responses to similar crises?

• Session 7: Pension systems and pension reforms

European countries are all facing a demographic change that will endanger their pension systems in the near future. This session will analyse the main challenges (beyond demographics, what are the economic and political challenges?) and the trends in the main reforms implemented in various European countries.

Required readings:

- in Ipek Eren Vural, Converging Europe, Ashgate, pp.93-116


Assignment for this session:

- Prepare the following question for discussion: Is there a common trend in pension reforms, beyond the specificities of national trajectories?

• Session 8: Health care systems and their reforms

All European countries have chosen to provide their citizens with health care as a social right. However they have chosen different ways of organising the services, of financing the health suppliers, and for implementing health policies. This session will be devoted to the ways health care reforms are thought out and implemented, trying to identify general trends and differences in the recent reforms implemented in Europe.

Required readings:

- Hassenteufel, in Bismarckian Countries: Towards Neo- 
  Social Policy and Administration, vol. 41, n°6, pp 574-596

- Wendt, Klaus, Frisina, Lorraine and Rothgang, Healthcare System Types: A Conce 
  Social Policy & Administration, Vol. 43, No. 1, February 2009 ,pp. 70 90

Assignment for this session:

- Prepare the following question for discussion: What are the main differences between health care systems?
• Session 9: Care policy reforms in Europe.

Promoting fertility are crucial elements for ensuring the sustainability of welfare states. All countries are now developing policies to promote the reconciliation of work and family life in order to encourage women to both work and have children. Some countries have done so for a long time while others are only starting to develop such policies. The types of policies developed vary greatly from one country to another, reflecting different levels of ambition when it comes to promoting gender equality, as well as differing preferences for public versus market or family solutions. This session will provide an overview of cross-national differences in care policies and their outcomes and discuss reform trajectories in different countries and the driving forces behind these reforms.

Required readings:

Assignment for this session:
- Prepare the following questions: What have been the main drivers of change in the field of care policies? Do care policies promote greater gender equality?

• Session 10: The dualisation of Europe

The principal component of a European social model was considered to be convergence toward the top in terms of social outcomes. However, the latest trends in terms of economic and social matters are no longer characterized by a steady narrowing of the gap between the more and lesser advanced countries. While all European countries were affected by the economic crisis of 2008 and a coordinated response was put into place in 2009, since 2010, we see a growing divergence between two groups of countries in Europe. The first group, mainly in the North of Europe, concentrated around Germany, Austria, the Nordic countries, along with certain Eastern European countries having close economic ties to Germany, has steadily emerged from the crisis and resumed a positive economic and social path. The second group, however, comprised mainly of the Southern and Eastern periphery, remains stuck in negative economic and social situations following the crisis.

Required Readings:
- Palier, Bruno, Rovny, Jan, Rovny, Allison, *The dualisations of Europe*, manuscript
- Palier, Bruno, Rovny, Jan, Rovny, Allison, *The dualisations of Europe*, manuscript
- West European Politics, 37/6, pp.1223-1243.

Assignment for this session:
- Prepare the following question for discussion: What are the main dimensions on which Europe shows economic and social increasing divides?

• Session 11: Towards a social investment welfare state?

Since the late 1990s, new ideas and strategies concerning the role and shape of the Welfare State have been formulated, with the focus being placed on developing policies...
competitive knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion, and respect for the environment.

The aim of this session is to analyse the content and coherence of the ideas put forward in this new perspective but also to assess how far the social investment strategy has actually come in terms of the policies effectively implemented throughout Europe, and with what outcomes.

Required readings:

Assignment for this session:
- Prepare the following question for discussion: What are the key elements of a social investment strategy? What are the possible pitfalls of such a strategy?

**Session 12: Challenges to the Welfare State**

In this class session, we will examine the ways in which contemporary welfare states are under strain, specifically by examining the presence of what are termed “New Social Risks.” These risks are concentrated within specific groups: youth, women, families with young children, older workers, and those with obsolete or insufficient skills, leading to atypical or precarious employment.

While it is difficult to identify one underlying cause or uniting interest among these groups, prominent scholars have pointed out that there is diversity and even conflict among these New Social Risk groups, which has political and social repercussions. The vulnerabilities of the NSR groups stem from three features of the post-industrial economy: 1) changing women’s roles; 2) changing labour market; and 3) an evolving welfare state that is centred around activating the work force.

Required readings:

Assignment for this session:
- Prepare the following questions for discussion: In what ways is the contemporary welfare state under strain, and how has this changed from 50 or even 25 or 15 years ago? Are some European countries better able to address these challenges than others and why or why not?
• **Session 13: Welfare State comparative indicators exercise**
In this class session, students will get to interact with data values that represent actual welfare states and different countries.

employment, wage dispersion, etc.) and identify the factors which represent the different types of welfare states. We will discuss the different features of the Christian Democratic/Nordic/ and Liberal welfare regimes that lead us to make conclusions about welfare state performance, and in the end, to be able to correctly link inputs and outputs, while identifying which country and welfare regime are likely represented by the data.

**Required reading:**

**Assignment for this session:**
- In-class assignment based on comparative welfare state and data analysis.

**Bibliography**

Besides the texts to be discussed in each sessions of the course, students should read the following books:


**Requirements for course validation**

Students are expected to:
- Read the required readings, prepare the assigned questions. Participate in discussions during the lectures.
- Write a social policy/welfare reform analysis (2500/3000 words including bibliography).
Bruno Palier is CNRS Research Director at Sciences Po, Centre d’études européennes. Trained in social science, he has a PHD in Political science, and is a former student of Ecole Normale Supérieure. He is studying welfare reforms in Europe. He is Honorary Professor in Welfare state research at the University of South Denmark. He was Guest Professor at the University of Stockholm (Spring 2009 and 2010), Visiting Scholar at Northwestern University (Spring quarter 2007), at Center for European Studies from Harvard University in 2001 and Jean Monnet Fellow in the European University Institute in Florence in 1998-1999. He has published numerous articles on welfare reforms in France and in Europe in Politics and Society, Journal of European Social Policy, West European Politics, Governance, Socio-Economic Review, Global Social Policy, Social Politics, and various books. In 2012, he co-edited The Age of Dualization: The Changing Face of Inequality in Deindustrializing Societies. (with Emmenegger, Patrick, Häusermann, Silja, and Seeleib-Kaiser, Martin), Oxford University Press, and Towards a social investment welfare state? Ideas, Policies and Challenges, (with Morel, Nathalie and Palme, Joakim), Bristol: Policy Press. In 2010, he edited A long Good Bye to Bismarck? The Politics of Welfare Reforms in Continental Europe, Amsterdam University Press.

Nathalie Morel holds a PhD in sociology from University Paris I, Panthéon-Sorbonne. From 2008 to 2010, she worked as post-doctoral researcher at the Institute for Futures Studies in Stockholm. Her research interests are in comparative social policy and labor markets, with a special interest in care policies, gender, social investment policies, domestic services, socio-fiscal policies / fiscal welfare, the financing of the welfare state, and in the Swedish welfare state. She has co-edited (with Bruno Palier & Joakim Palme) Towards a social investment welfare state? Ideas, policies and challenges, Policy Press, 2012, and (with Clément Carbonnier) The political economy of household services in Europe, Basingstoke: Palgrave Macmillan, 2015. She is co-director of the LIEPP “socio-fiscal” research group. She is an elected board member of the French Sociological Association RT6 (Social policies, social protection) since 2004, of the ISA RC19 (Research Committee on Poverty, Social Welfare and Social Policy) since 2014 and of Espanet (European social policy network association) since 2015.

Allison E. Rovny, Ph.D., postdoctoral researcher at the University of Gothenburg, Centre for European Research (CERGU). Her research focuses on the welfare state, the presence of new social risks in postindustrial political economies, and the growing divide between those deemed to be insiders and outsiders. She has investigated the determinants of outsidership expressed as single parent income, child poverty rate, and youth unemployment. She has also analyzed the effects of social policies on the likelihood of being poor among low-skilled populations. Her ongoing research projects consider the cases of France, Sweden, and Germany, and probe the extent to which a divide between labor market insiders and outsiders has cemented over time, and whether the welfare state exacerbates or ameliorates this dualism.