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# THE WORLD POLITICS OF SOCIAL INVESTMENT

Recent research on the development and implementation of social investment (i.e. policies that aim at creating, preserving, and mobilizing human skills and capabilities) has shown that there is some level of implementation of social investment policies not only in different regions of Europe, but also in North America, Latin America, and East Asia. However, one cannot speak of a general development of a social investment welfare state, as the phase but also-and especially-the specific substance of the social investment policies varies strongly between these regions. Why have social investment ideas and policies been more developed in some regions and countries than in others? Why do they differ in their forms, being inclusive in some regions, but stratified or targeted in others? Going beyond different structural pressure, the project aims at theorizing the politics of social investment and testing different explanations empirically. The aim is to assess what the political conditions for the development of social investment policies are. Given that similar governments in different contexts have adopted different strategies with regard to social investment, the project investigates the institutional and socio-structural factors that enable or prevent political support coalitions for (different kinds of) social investment.

## Socio-fiscal Policies Research Group

Project team:

### Bruno PALIER



Bruno Palier is the director of LIEPP and CNRS researcher at Sciences Po (Centre d'études européennes et de politique comparée).

Trained in social science, he has a PhD in Political science, and is a former student of Ecole Normale Supérieure. Currently, he conducts various comparative projects on welfare reforms in Europe.

### Silja HÄUSERMANN



Silja Häusermann is a Professor of Political Science at the University of Zürich.

Her current work deals with electoral and distributive politics in advanced post-industrial democracies, with protest behavior in the context of the Eurocrisis, with welfare politics and with identifying policy preferences via experimental survey designs

### Julian GARRITZMANN



Julian Garritzmann is Professor of Political Science at the Goethe University Frankfurt.

He holds a PhD in political science from the University of Konstanz and has been Senior Researcher at the University of Zurich, as well as Max Weber Fellow at the European University Institute and Visiting Scholar at Harvard, Duke, and Rutgers. Julian specializes in the interplay of education and social (investment) policies around the globe.

Partnerships :



## Research Problem

This project assesses the political conditions for the development of social investment policies, investigate the politics of Social Investment in Europe, North and Latin America, and East Asia along the following three questions:

- 1) What explains the content of the social investment agenda? To what degree and in what form is social investment politicized? (empirically: identify framing and the effect of institutional legacies – constraints, economic strategy- on the social investment agenda in different regions of the world)
- 2) How does political conflict over social investment map onto other conflict lines and cleavages? (empirically: identify actor positions, dimensionality, links between actor positions on different issues).
- 3) What political coalitions support or prevent a social investment turn? Why do policies in some areas taken an inclusive form, while they are stratified or targeted elsewhere? (empirically: identify reform coalitions and the institutional and structural conditions that produce them)

## Program of the WOPSI Conference

The first WOPSI Conference was held from March the 9th to March the 11th 2017, in Sciences Po, gathering 48 participants and where 28 papers were presented, organized in different sessions. In Spring 2018, three more conference have been organized, in order to discuss further the draft chapters that will be gathered into two books. Since then, the editors and authors have continued to work on the chapters and the coherence of the volumes, which are forthcoming with *Oxford University Press* in 2021. Here are the table of content of these two books:

### The World Politics of Social Investment (Volume I) Welfare States in the Knowledge Economy

1. Introduction: Unpacking the Politics of Social Investment  
*Julian L. Garritzmann, Silja Häusermann, Bruno Palier*
  2. The Politics of Social Investment: A Global Theoretical Framework  
*Julian L. Garritzmann, Silja Häusermann, Bruno Palier*
- Part I: The ideational context of social investment politics**
3. Multiple Sources of Social Investment Ideas. Cross-fertilization and Convergent Evolution  
*Jane Jenson, Rianne Mahon*
  4. The EU and Social Investment  
*Bruno Palier, Caroline de la Porte*
- Part II: The Political and Economic Scope Conditions of Social Investment Reforms**
5. Social Investment and Social Assistance in Low- and Middle-Income Countries  
*Armando Barrientos*
  6. Political Linkage Strategies and Social Investment Policies: Clientelism and Educational Policy in the Developing World  
*Haochan Chen, Herbert Kitschelt*
  7. State Capacity and social investment: Explaining variation in skills creation reforms in Latin America  
*Juan Bogliaccini, Aldo Madariaga*
  8. The Emergence of Knowledge Economies: Educational Expansion, Labor Market Changes, and the Politics of Social Investment  
*Julian L. Garritzmann, Silja Häusermann, Thomas Kurzer, Bruno Palier, Michael Pinggera*
- Part III: Demand for Social Investment - Public Opinion and Social Partners' Social Investment Policy Preferences**
9. Employers' Social Investment Policy Preferences and Their Role in the Politics of Social Investment in Europe  
*Emmanuelle Pavolini, Martin Seeleib-Kaiser*
  10. Social (Investment) Partners? Trade Unions and the Welfare State for the Knowledge Economy  
*Niccolò Durazzi, Leonard Geyer*
  11. Trade Unions and Investment in Early Childhood Education and Care in Latin America  
*Melina Altamirano, Bárbara Zárate-Tenorio*
  12. Public Preferences Towards Social Investment: Comparing Patterns of Support Across Three Continents  
*Björn Bremer*
- Part IV: The Comparative Politics of Social Investment Reforms**
13. Social Investment and Neoliberal Legacies in Latin America: Breaking the Mold?  
*Evelyne Huber, Claire Dunn, John D. Stephens*
  14. Different Paths to Social Investment? Democratization, Timing, and Different Social Investment Strategies in South-East Asia and Southern Europe  
*Margarita Estévez-Abe, Margarita León*
  15. Social Investment or Child Care on the Cheap? The Goals of Quality, Workforce, and Access in the Expansion of Early Childhood Education and Care  
*Kimberly Morgan*
  16. Conclusion: Analytical insights, research agenda for cross-national variation  
*Julian L. Garritzmann, Silja Häusermann, Bruno Palier*

## To learn more about the project

**SciencesPo**  
LABORATOIRE INTERDISCIPLINAIRE  
D'ÉVALUATION DES POLITIQUES PUBLIQUES

LIEPP Working Paper  
March 2017, n°64

**WoPSI - the World Politics of Social Investment:**  
An international research project to explain variance in social investment agendas and social investment reforms across countries and world regions

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Julian L. Garritzmann, Silja Häusermann, Bruno Palier and Christine Zollinger, « **WoPSI - the World Politics of Social Investment: An international research project to explain variance in social investment agendas and social investment reforms across countries and world regions** » *LIEPP Working Paper*, n° 64, March 2017.

### The World Politics of Social Investment (Volume II) The Politics of Varying Social Investment Strategies

- Introduction**
1. Introduction: The Politics of Inclusive, Stratified, and Targeted Social Investment around the Globe  
*Julian L. Garritzmann, Silja Häusermann, Bruno Palier*
- Part I: Western Europe and North America**
2. Legacies of Universalism: Origins and Persistence of the Broad Political Support for Inclusive Social Investment in Scandinavia  
*Alexander Horn, Kees van Kersbergen*
  3. Loud, Noisy, or Quiet Politics? The Role of Public Opinion, Parties, and Interest Groups in Social Investment Reforms in Western Europe  
*Marius R. Busemeyer, Julian L. Garritzmann*
  4. The Politicization of Childcare and Activation in Southern Europe  
*Reto Bürgisser*
  5. Reforming without Investing: The Politics of Social Policy Change in Italy  
*Stefano Ronchi, Patrik Vespa*
  6. The Politics of Early Years and Family Policy Investments in North America  
*Linda White, Susan Prentice*
- Part II: Central and Eastern Europe**
7. The Politics of Social Investment in the Baltic States  
*Anu Toots, Triin Lauri*
  8. How Social Investment Has Become a Non-Issue in the Visegrád countries  
*Michał Polakowski, Dorota Szelewa*
  9. Explaining the Contrasting Welfare Trajectories of the Baltic and Visegrád Countries: A Growth-Strategy Perspective  
*Sonja Avlijaš*
- Part III: North East Asia**
10. The Politicization of Social Investment in the Media and Legislature in North East Asia  
*Jaemin Shim*
  11. An increasing but diverse support for Social investment: Public Opinion on Social Investment in the North East Asian Welfare Systems  
*Ijin Hong, Chung-Yang Yeh, Jigun Lee, Jen-Der Lue*
  12. Quiet Diffusion of Social Investment in Japan  
*Mari Miura, Eriko Hamada*
  13. From targeted to universal social investment in childcare, the politics of social investment in post-industrial Korea  
*Sophia Seung-yoon Lee, Yeon-Myung Kim*
- Part IV: Latin America**
14. The Politicization of Social Investment in Latin America  
*J. Salvador Peralta*
  15. Social Policy for Institutional Change: Bolivia, Brazil, and Peru  
*Jane Jenson, Nora Nagels*
  16. The Politics of Conditionality in Latin America's Cash Transfer Reforms  
*Cecilia Rosset, Florencia Antia, Pilar Manzi*
  17. Conclusion  
*Julian L. Garritzmann, Silja Häusermann, Bruno Palier*