Varieties of Democratic Capitalism in Europe and North America

Mondays and Wednesdays 11:30-12:45
All classes via Zoom
(Version: August 24, 2020)

John D. Stephens
Center for European Studies
3211 FedEx Global Education Center
Office hours:
Wednesdays 1-4 via Skype or Zoom, by appointment
Email: jdsteph@unc.edu
Text messages: 919-260-7899

Course Description: The course will examine the development of different types of welfare states in Europe and North America. The course will be structured around the concept of “welfare states regimes”, as defined in Gøsta Esping-Andersen in his path breaking book, Three Worlds of Welfare Capitalism. We will also explore how the four welfare state regimes interlock with different “labor market regimes”, systems of wage bargaining and employment and labor relations, and, in turn, how these labor market and welfare state regimes constitute elements of different “varieties of capitalism”. The course moves back and forth from broad conceptual issues to examination of developments in five countries which represent the different welfare state types: the United States and Britain as liberal welfare states, Sweden as a social democratic welfare state, Germany as a Christian democratic welfare state, and Italy as a Southern or Mediterranean regime. The course will focus above all on how social and political forces shaped the development of the economic policies aimed at securing economic growth and employment and of social policies aimed at providing social security, combating poverty, and effecting redistribution. In addition, we will examine how demographic and international economic pressures of the past two decades have transformed the regimes. For the European countries, by far the most important “international economic pressure” has been the process European integration.

Teaching Methods and Evaluation: The course alternates between lectures and discussion. Three or four students will lead each discussion section. The student's grade in the course will depend on four elements: two take home exams (20% each), one essay (40%), and class participation. The essay examines the welfare state regime of one country not covered in the course comparing it to both the general type of welfare state regime it represents (liberal, Christian democratic, Mediterranean, or social democratic) and the specific representative (US, UK, Germany, Italy, or Sweden) which we have studied in depth. The essay can cover any country in North America or Europe including all current members of the EU and Switzerland and Norway. The essay should be about 5000 words long. There is a document in Course Information in Sakai with more detailed instructions about the essay.
Discussions: Each student will help lead two class discussions with three or four other students. The three (four) students should meet a day or so before the class discussion and make a list of about 10 discussion questions. The questions should provoke debate; most of them should not have right or wrong answers. I have posted several weeks’ discussion questions from past years in “Course Information” to provide a template for the discussion leaders. The format of the discussion sessions will be 40-45 minutes of group discussion (break out sessions in Zoom) led by the discussion leaders, followed by 30-35 minutes of common discussions led by the discussion leaders and the instructor.

Remote and in person components of the course: The lectures will be remote via Zoom. For at least the first three or four weeks, the discussions will also be remote. We do have a room where we could meet in person and we can do that if it seems feasible and if everyone agrees that would be a good move.

If we do move to in person discussions, the following mask use policy will be in effect:

Community Standards in Our Course and Mask Use.

This fall semester, while we are in the midst of a global pandemic, all enrolled students are required to wear a mask covering your mouth and nose at all times in our classroom. This requirement is to protect our educational community — your classmates and me — as we learn together. If you choose not to wear a mask, or wear it improperly, I will ask you to leave immediately, and I will submit a report to the Office of Student Conduct. At that point you will be disenrolled from this course for the protection of our educational community.

Students who have an authorized accommodation from Accessibility Resources and Service have an exception. For additional information, see Carolina Together.

Readings:

The following books are available at the Student Store:


The other readings are on available in Sakai.
For all of the countries we study, the European Industrial Relations Foundation website (http://eiro.eurofound.ie/) is an excellent source for current information on industrial relations, the economy, and government policy. The Journal of European Social Policy is also an excellent source for up to date information on social policy developments in Europe.

**Course Session Calendar**

Lectures will take place via Zoom. They will be recorded, so the students do not have to attend them at the appointed time. Of course, only the student attending the Zoom session will be able to ask questions.

**August 10**  Introduction

**August 12**  Lecture: Theories of Welfare State Development; Three Worlds of Welfare Capitalism

Esping-Andersen, Chapters 1, 2, 5, 6
John Myles and Jill Quadagno, "Political Theories of the Welfare State," Social Science Review, March, 2002. Read pages 34-41. We will read the rest latter.

**August 17**  Discussion

**August 19**  Lecture: Party Systems and Governmental Structures

W.S. Allen, The Nazi Seizure of Power, chapters 1and 2

**August 24**  Pause

**August 26**  Discussion

**August 31**  Lecture: Wage Bargaining and Varieties of Capitalism

September 2  Discussion

September 7 Labor Day – no class

September 9  Lecture: United Kingdom

Shaw and Hopkin in Tiersky and Jones

September 14  Discussion

September 16  Lecture: Sweden

Einhorn in Tiersky and Jones

September 21 Discussion

September 23  Lecture: Gender and the Welfare State

September 28  Discussion

September 30  Lecture: Germany

Welsh in Tiersky and Jones

Circa October 1  First take home exam. It will cover the material through the gender discussion.

October 5 Germany Discussion

October 7 Discussion: Immigration and the Welfare State

Sainsbury

October 12 Lecture: Welfare State Retrenchment


October 14  Discussion

October 19 Lecture: Italy

Baldini in Tiersky and Jones
Putnam, Chapters 1-4 (6 is recommended)
October 21 Discussion on Italy

October 26 Lecture: New Social Risks, Social Investment policies

Gøsta Esping-Andersen et al., Why we need a New Welfare State, Oxford, 2002, Chapters 2 (Esping-Andersen), 6 (Hemerijck).
Caroline de la Porte and Bruno Palier, “The politics and policies of social investment at the EU level: a longitudinal analysis.”

October 28 Discussion

November 2 Country paper due.

November 2, 4 and 9. Presentation of country essays.

November 11 Discussion: United States


November 16 Second take home exam covering the second half of the course (if the students prefer, we can move this to between November 18 and 24)