TransAtlantic Masters Program

Political Science 745

Fall 2021

# Varieties of Democratic Capitalism in Europe and North America

Tuesdays and Thursdays 3:30-4:45

GEC 3024

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**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 state regimes", as defined by 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 of 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 if we decide to use 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:** Thelectures will be in class in GEC 3024. Depending on the preferences of the class, the discussions will be in class with everyone wearing masks or they could be a combination of outdoor venues, weather permitting, and Zoom. We will discuss this in the first class session.

**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](https://cm.maxient.com/reportingform.php?UNCChapelHill&layout_id=23). 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](https://carolinatogether.unc.edu/university-guidelines-for-facemasks/).

**Readings:**

The following books are available at the Student Store:

Gøsta Esping-Andersen, *The Three Worlds of Welfare Capitalism*, Princeton University Press, 1990 (0-691-02857-5)

Robert Putnam, *Making Democracy Work*, Princeton University Press, 1993 (0-691-03738-8)

Ronald Tiersky and Erik Jones, *Europe Today: A Twenty-first Century Introduction*, 5th Edition, Rowman and Littlefield, 2014 (Order this book from Amazon. It is much cheaper there than at the Student Store, though you might get cheap used copy at Student Stores)

Diane Sainsbury, *Welfare States and Immigrants’ Rights: The Politics of Inclusion and Exclusion*, Oxford, 2012. (978-0-19-965478-9)

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

August 19 Introduction

August 24 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.

Maurizio Ferrera, “The Southern Model of Welfare in Social Europe.” *Journal of European Social Policy*, 1: 17-37, 1996.

Inés Campillo and Jorge Sola, “Power Resources Theory: A Critical Reassessment.” *Revista Española de Investigaciones Sociológicas*, 170, 2020. Read pages 19-23. We will read the rest latter.

August 26 Discussion

August 31 Lecture: Party Systems and Governmental Structures

S.M. Lipset and Stein Rokkan, "Cleavage Structures, Party Systems, and Voter Alignments." Pp. 1-64 in S.M. Lipset and Stein Rokkan (eds.), *Party Systems and Voter Alignments*, Free Press, 1967. (concentrate on pages 26-50)

Ellen Immergut, "The Rules of the Game: The Logic of Health Policy Making in France, Switzerland and Sweden." In Sven Steinmo, et al. (eds.), *Structuring Politics: Historical Institutionalism in Comparative Analysis*, Cambridge, 1992.

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

September 2 Discussion

September 7 Lecture: Wage Bargaining and Varieties of Capitalism

Peter Hall and David Soskice, "An Introduction to Varieties of Capitalism.' In Peter Hall and David Soskice (eds.) *Varieties of Capitalism: The Institutional Foundations of Comparative Advantage*. Oxford, 2001.

September 9 Discussion

September 14 Lecture: United Kingdom

Shaw and Hopkin in Tiersky and Jones

James Cronin “Embracing Markets, Bonding with America, Trying to Do Good: The Ironies of New Labour.” Pp. 116-40 in James Cronin, George Ross, and James Shoch (eds.), *What’s Left of the Left: Democrats and Social Democrats in Challenging Times*. Durham: Duke University Press, 2011..

Libby McEnhill and Peter Taylor-Gooby, “Beyond Continuity? Understanding Change in the UK Welfare State since 2010,” *Social Policy and Administration* 52 (1): 252-270.

John Hills, “Labour’s record on cash transfers, poverty, inequality and the life cycle.” CASE Working Paper #5, 2013.

September 16 Discussion

September 21 Lecture: Sweden

Einhorn in Tiersky and Jones

Jonas Pontusson “Once Again a Model: Nordic Social Democracy in a Globalized World.” Pp. 89-115 in James Cronin, George Ross, and James Shoch (eds.), *What’s Left of the Left: Democrats and Social Democrats in Challenging Times*. Durham: Duke University Press, 2011.

John D. Stephens, “Social Investment and the Knowledge Economy.” Symposium on *Nordic Capitalisms* in *Socio-Economic Review*, 2012.

September 23 Discussion

September 28 Lecture: Gender and the Welfare State

Kimberly Morgan, Path Shifting and the Welfare State: Electoral Competition and the Expansion of Work-Family Policies in Western Europe, *World Politics* 65(1): 73-115, 2013.

Gøsta Esping-Andersen, Chapter 4 (The Household Economy) in *Social Foundations of Postindustrial Economies*, Oxford, 1999.

Julia O’Connor. 2014. “The State and Gender Equality: From Patriarchal to Women-Friendly State?” in Leibfried et al. *Oxford Handbook of Transformations of the State*, Oxford.

Inés Campillo and Jorge Sola, “Power Resources Theory: A Critical Reassessment.” *Revista Española de Investigaciones Sociológicas*, 170, 2020. Read pages 23-25.

September 30 No class. I will be at the APSA meetings in Seattle.

October 5 Discussion on Gender and the Welfare State

October 7 Lecture: Germany

Welsh in Tiersky and Jones

Karl Hinrichs, “A Social Insurance State Withers Away – Welfare State Reforms in Germany,” in Bruno Palier (ed.), *A Long Goodbye to Bismarck? The Politics of Welfare Reform in Continental Europe*, Amsterdam University Press, 2010.

Bruno Palier, “Continental Western Europe” in Francis G. Castles, Stephan Leibfried, Jane Lewis, Herbert Obinger, and Christopher Pierson, *The Oxford Handbook of the Welfare State*, Oxford, 2010.

October 12 Germany Discussion

October 14 No class; I will be Chicago. This is an approximation; sometime in October I will miss a class.

Circa October 18 First take home exam. It will cover the material through the gender discussion.

October 19 Discussion: Immigration and the Welfare State

Sainsbury, Part 1, chapters 1-7, 12

October 21 Fall Break

October 26 Lecture: Welfare State Retrenchment

John Myles and Jill Quadagno, "Political Theories of the Welfare State," *Social Science Review*, March, 2002. Read pages 41-57. (NB: Trilemma argument is disputed.)

Inés Campillo and Jorge Sola, “Power Resources Theory: A Critical Reassessment.” *Revista Española de Investigaciones Sociológicas*, 170, 2020. Read pages 25-31.

Paul Pierson, "Coping with Permanent Austerity." In Paul Pierson (ed.) *The New Politics of the Welfare State*, Oxford, 2001.

Bruno Palier, “The Long Conservative Corporatist Road to Welfare Reform,” in Bruno Palier (ed.), *A Long Goodbye to Bismarck? The Politics of Welfare Reform in Continental Europe*, Amsterdam University Press, 2010.

October 28 Discussion

November 2 Lecture: Italy

Baldini in Tiersky and Jones

Matteo Jessoula and Tiziana Alti, “Italy: An Incomplete Departure from Bismarck,” in Bruno Palier (ed.), *A Long Goodbye to Bismarck? The Politics of Welfare Reform in Continental Europe*, Amsterdam University Press, 2010.

Maurizio Ferrera, “The South European Countries,” in Francis G. Castles, Stephan Leibfried, Jane Lewis, Herbert Obinger, and Christopher Pierson (eds.), *The Oxford Handbook of the Welfare State*, Oxford, 2010.

Putnam, Skim chapters 1-2, read chapters 3-4, 6 pp. 167-77

November 4 Discussion on Italy

November 9 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) and 6 (Hemerijck).

Giuliano Bonoli, “New Social Risks and the Politics of Post-industrial Social Policies,” in Klaus Armingeon and Giuliano Bonoli, *The Politics of Post-Industrial Welfare States: Adapting Post-war Social Policies to New Social Risks*, Routledge, 2006.

Frank Vandenbroucke, Anton Hemerijck, and Bruno Palier, “The EU Needs a Social Investment Pact,” *Observatoire social européen*, Opinion paper number 5, 2011.

November 11 Discussion

November 16 Country paper due.

November 16, 28 and 23. Presentation of country essays.

November 30 Discussion: United States

Jacob Hacker, “Policy Drift: The Hidden Politics of U.S. Welfare State Retrenchment.” In Wolfgang Streeck and Kathleen Thelen (eds.), *Beyond Continuity*, Oxford, 2005.

Edwin Amenta, *Bold Relief:* *Institutional Politics and the Origin of Modern American Social Policy*, Princeton, 1998, conclusion.

Jacob Hacker, “America’s Welfare Parastate.” *Perspectives on Politics* 14 (3): 777-783.

Between December1 and 5 Second take home exam covering the second half of the course