



## Seminar: Gender and the Welfare State

Fachbereich Geschichte und Soziologie  
Summer Semester 2016  
Bachelor Soziologie: Hauptfach  
SWS 2  
Aufbaumodul 7: Spezielle Soziologie  
(PL) 5/6/7 ECTS, (StL) 3 ECTS

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Times: Wednesdays in a two week rhythm, 17 - 20.15 o'clock  
Room: F-427

### **Class Goals**

In this seminar we analyse the origins and development of social policies. We cover a range of particular policies such as social security, pensions, family and sick leave, taxes in social issues, and child care. The goal of this class is to understand basic welfare state theories, policy-making and issues around social policies, such as poverty, gender, race and class. An additional goal of the class is to understand the logics of comparative studies. By the end of the class, students should have deeper knowledge of particular policies and social problems in diverse welfare states. They should have a good grasp of the theoretical approaches of welfare state and social policy development and elemental tools of social policy evaluation. For the most part, readings, presentations and discussion will be in English.

### **Requirements for a "Schein"**

A grade will be awarded to students who attend class regularly, prepare and organize a learning unit from one of the topics of the seminar with presentation (Referat) and discussion management, and either write a term paper due at the end of the semester or write an exam.

#### *Attendance (round-up of grade)*

Students are expected to attend every class and participate actively in class discussion and should inform me of absences. Unexplained or unexcused absences will be taken into account in calculating the grade. Participation includes the quantity and quality the effort in seminar discussions. It is essential to be prepared for class, to be attentive to class discussions, and to contribute to others' learning by raising thoughtful questions and comments in class that provide insight and analysis to the material. If the participation of a student has been outstanding and his or her average grade point is in between two grades, then it will be rounded up.

#### *Organization of learning unit (50% of grade)*

Students are expected to choose a class meeting and prepare readings as well as direct the class in discussion at this meeting. The presenter(s) will be asked to review the material and their presentation with me one week in advance of their prepared class. There is roughly 60 minutes for both the presentation and discussion. Student groups are responsible for preparing a thoughtful, creative and

critical presentation of the material. Please do not only summarize the readings for the presentation, but assume that the class has read the material. The evaluation of students' work rests on the quality of the presentation and discussion (see my evaluation sheet) as well as the hand-out.

### *Term paper or written exam (50% of grade)*

The term paper should be around 20 pages including references. The paper needs to be finished by the 20. August 2016. It is possible to write the paper in German. An extra consultation with me is a good idea for innovative term paper topics and effective/efficient writing. Academic citing and honesty is required. Alternatively, a class exam can be arranged for the last day of class. The exam tests terminology, theories and incorporates issues we discussed in class.

### **Required Readings and Ilias Platform**

Readings with an asterisk are required reading for the entire class, and those without asterisks are material which can be read in addition to required readings and for those who are presenting. All students are encouraged to read this additional material to add to class discussions and their written work. The Ilias Platform is a learning and organisational tool for the seminar. All of the presentations and handouts should be loaded up on the platform. Students can gain access to the course by applying directly through the Ilias Platform. The password is: GWS2016

*Good overviews of welfare state topics and issues can be found in the following books:*

- Castles, Francis G.; Leibfried, Stephan; Lewis, Jane; Obinger, Herbert; Pierson, Christopher, 2010: *The Oxford Handbook of the Welfare State*. Oxford: Oxford University Press.
- Pierson, Christopher; Castles, Francis G.; Naumann, Ingela K. (2014). *The Welfare State Reader*. Third Edition. Cambridge, UK and Malden, US: Polity Press.
- Schmid, Josef (2010). *Wohlfahrtsstaaten im Vergleich*. 3te. Auflage. Wiesbaden: VS Verlag.

### **Seminar Sessions**

#### **1. Session 20.04.16 Introduction and overview of approaches, questions and concepts**

##### **Introduction**

##### Guiding questions:

What is welfare state research? How has welfare state research developed? What is social policy? How do you approach social policy analysis? How can we trace important social policy developments and outcomes in terms of gender?

##### Concepts:

Gender, welfare states, (types of) social policy, recent developments in research approaches and policy

##### Literature:

Overbye, Einar (2010). Chapter 10. Disciplinary Perspectives. In: Castles, Francis G.; Leibfried, Stephan; Lewis, Jane; Obinger, Herbert; Pierson, Christopher, 2010: *The Oxford Handbook of the Welfare State*. Oxford: Oxford University Press, 152-166.

Pateman, Carol (2010). The patriarchal welfare state. Abridged and reprinted In: Pierson, Christopher; Castles, Francis G.; Naumann, Ingela K. (2014). *The Welfare State Reader*. Third Edition. Cambridge, UK and Malden, US: Polity Press, 102-119.

Titmuss, Richard (2010). Universalism versus Selection. Abridged and reprinted in: Pierson, Christopher; Castles, Francis G.; Naumann, Ingela K. (2014). *The Welfare State Reader*. Third Edition. Cambridge, UK and Malden, US: Polity Press, 38-46.

## 2. Session 04.05.16 *Models and Methods of Comparison*

### **Models**

#### Guiding questions:

How does Esping-Andersen characterize his three worlds of welfare state capitalism? What are his criteria for analysis? Can you think of strengths or weaknesses of this approach? How can “gender” be incorporated into his welfare state models? How has there been a development of models since Esping-Andersen?

#### Concepts:

Welfare state regime types, commodification, de-commodification, historical institutionalism theory, power resources theory

#### Literature:

\*Esping Andersen, Gosta (1990). Chapter 1. In: *The Three Worlds of Welfare Capitalism*. Princeton: Princeton University Press, 9-34 (especially pages 18-34).

\*Esping-Andersen, Gosta (1990). Chapter 2. In: *The Three Worlds of Welfare Capitalism*. Cambridge: Cambridge University Press, 35-54 (especially pages 47-54).

Arts, Wil A. and Gelissen, John (2010). Chapter 39. Models of the Welfare State. In: Castles, Francis G.; Leibfried, Stephan; Lewis, Jane; Obinger, Herbert; Pierson, Christopher, 2010: *The Oxford Handbook of the Welfare State*. Oxford: Oxford University Press, 569-583.

### **Methods of Comparison**

#### Guiding questions:

According to Sartori, why should one compare? What are Sartori’s methodological approaches to comparison? How can one make mistakes when comparing? How would you apply Sartori’s sentiment to Esping-Anderson’s approach (what is the purpose of Esping-Anderson’s comparison)? How is or could gender be a factor in the comparison? How might gender generally be a category of comparison?

#### Concepts:

Misclassification, degreeism, concept stretching, most similar system design, most different system design, incommensurability, ladder of abstraction

#### Literature:

\*Sartori, Giovanni (1991). Comparing and Miscomparing. In: *Journal of Theoretical Politics* 3 (3), 243-257.

Amenta, Edwin and Hicks, Alexander (2010). Chapter 7. Research Methods. In: Castles, Francis G.; Leibfried, Stephan; Lewis, Jane; Obinger, Herbert; Pierson, Christopher, 2010: *The Oxford Handbook of the Welfare State*. Oxford: Oxford University Press, 105-120.

### 3. Session 18.05.16 *Social rights, solidarity and dependency*

#### **Social Rights**

##### Guiding questions:

According to Marshall, how have rights historically developed? According to Marshall, how has economic development shaped the development of social rights? How do women and minorities play into this theory? What are your thoughts on this and how would you speculate on further developments in social rights according to this theory?

##### Concepts:

Civil, political and social rights

##### Literature:

\*Marshall, TH (1965). Citizenship and Class. In: Marshall, T.H. (1965): *Class, Citizenship and Social Development*. New York, Doubleday Anchor, 71-134. Or in translation: Marshall, TH (1992): Bürgerrechte und soziale Klassen. Zur Soziologie des Wohlfahrtsstaates (Hrsg. und übersetzt von Elmar Rieger) Frankfurt/New York: Campus Verlag, 33-94.

Marshall, TH. (1965). Citizenship and Social Class. Abridged and reprinted In: Pierson, Christopher; Castles, Francis G.; Naumann, Ingela K. (2014). *The Welfare State Reader*. Third Edition. Cambridge, UK and Malden, US: Polity Press, 28-37.

#### **Solidarity and dependency**

##### Guiding questions:

How does Orloff critique Esping-Andersen and others on the “power resource” approach to welfare state development? According to Orloff, how can women be incorporated into an analysis of the welfare state? Do you agree with her conclusions?

##### Concepts:

Power resources, (in)dependency, autonomous household

##### Literature:

\*Orloff, Ann Shola (1993). Gender and the social rights of citizenship: State policies and gender relations in comparative research, *American Sociological Review*, Vol. 58, No. 3: 303-328

Fraser, Nancy and Gordon, Linda (1994). A genealogy of dependency: Tracing a keyword of the U.S. welfare state. In: *Signs* 19 (2), Winter, 1994, 309-336.

### 4. Session 01.06.16 *Markets, employment and social insurance*

#### **Market systems**

Guiding questions: How do Hall and Soskice conceptualize and characterize their model of political economies? What are the differences between liberal and coordinated market economies in terms of vocational training, exchanging information among companies, corporate strategies for profit-making and building their reputation, specialization and labor regulation/trade union culture? How does the welfare state play a part in these economies?

##### Concepts:

Liberal market economies, coordinated market economies

Literature:

\*Hall, Pater A. and Soskice, David (2001). Chapter 1: An Introduction to Varieties of Capitalism. In: *Varieties of Capitalism: The Institutional Foundations of Comparative Advantage*. Oxford: Oxford University Press, 1-68 (especially pages 6-44 and 50-51).

Esevez-Abe, Margarita (2009). Gender, inequality, and capitalism: The “varieties of capitalism” and women. In: *Social Politics* 16 (2), 182-191.

Gornick, Janet C. (1999): Gender Equality in the Labour Market. In: Sainsbury, Diane (Hrsg.): *Gender and Welfare State Regimes*, Oxford, Oxford University Press: 210-242.

**Employment and social insurance (pensions)**

Guiding questions:

How does Meyer characterize the pension systems in Beveridge and Bismarck models and their current developments, in particular the UK and Germany? How will men and women be effected by these changes, according to the author?

Concepts:

Beveridge and Bismarck models and their pension characteristics

Literature:

\*Meyer, Traute (2014). Beveridge not Bismarck! European lessons for men’s and women’s pensions in Germany. Conference paper. Friedrich Ebert Foundation, 1-30.

Hinrichs, Karl and Lynch, Julia F (2010). Chapter 24. Old-Age Pensions. In: Castles, Francis G.; Leibfried, Stephan; Lewis, Jane; Obinger, Herbert; Pierson, Christopher, 2010: *The Oxford Handbook of the Welfare State*. Oxford: Oxford University Press, 354-366.

Schmid, Josef (2010). Rentenversicherungssysteme in Europa, in: Schmid, Josef (Hrsg.): *Wohlfahrtsstaaten im Vergleich. Soziale Sicherung in Europa: Organisation, Finanzierung, Leistungen und Probleme*, 3. völlig überarbeitete Auflage, VS Verlag, Wiesbaden, S. 299-313.

**5. Session 15.06.16 Care work, analysis and policy goals**

**Care work and analysis**

Guiding questions:

According to Esping-Andersen, what needs to occur in order for women to be included in the Three Models of Welfare State Capitalism? How does Esping-Andersen characterize familialization and defamilialization among his welfare state models? What is state and market defamilialization? How do you find these analytical frameworks useful (or not useful)?

Concepts:

familialization, (state and market) defamilialization

Literature:

\*Esping-Andersen, Gosta (2000). Chapter 4: The Household Economy, in *Social Foundations of Postindustrial Economies*. Oxford: Oxford University Press, 47-72.

Leitner, Sigrid (2003). Varieties of familialism. The caring function of the family in comparative perspective. In: *European Societies*. 4/2003, 353-375.

## **Policy goals and directions**

### Guiding questions:

What are Fraser's principles of gender equity? What kind of welfare states or social policies follow the universal breadwinner model? What kind of welfare states or social policies follow the care-giver parity model? In your opinion, what would a universal caregiver model look like – what kind of economic system would be in place and what social policies would ensue?

### Concepts:

Universal breadwinner model, care-giver parity model, universal caregiver model

### Literature:

- \*Fraser, Nancy (1996). Gender equality and the welfare state: A postindustrial thought experiment. In: Benhabib, Seyla: *Democracy and Difference: Contesting the Boundaries of the Political*. Princeton: Princeton University Press, 218-241.
- Daly, Mary (2011). What adult worker model? A critical look at recent social policy reform in Europe from a gender and family perspective. In: *Social Politics* 18(1): 1-23.
- Bettio, Francesca; Plantenga, Janneke (2004). Comparing Care Regimes in Europe, *Feminist Economies*, Vol. 10, No. 1, 85-113.
- Ostner, Ilona (1995). "Arm ohne Ehemann? Sozialpolitische Regulierung von Lebenschancen für Frauen im internationalen Vergleich." *Aus Politik und Zeitgeschichte* B(36-37), pp. 3-22.

## **6. Session 29.06.16 Factors of change and measuring outcomes**

### **Factors of change**

#### Guiding questions:

What standard factors for social policy change are there? According to Levin, how did the European politics and structures have an impact on employment protection in the UK? Were there any surprising factors in this policy making?

#### Theoretical approaches:

Historical institutionalism, politics matter, state feminism and femocrats, industrialism, neo-Marxism, pluralism, ideas and culture as factors

#### Literature:

- \*Levin, Peter (1997). European social policy and the UK: The Social Charter and the protection of women workers. *Making Social Policy. The Mechanisms of Government and Politics and How to Investigate Them*. P. Levin. Buckingham/Philadelphia, Open University Press, 204-223.
- \*Woods, Dorian R. (2012). Introduction. In: *Family Policy in Transformation. USA and British Policies*. Basingstoke: Palgrave Macmillan, 5-11.
- Robert Lieberman (2006). Chapter 1: Race and the limits of social solidarity. American Welfare state development in comparative Perspective. In: Schramm, Sanford F, Joe Soss and Richard C. Fording, (Ed) *Race and the politics of welfare reform*, Michigan: University of Michigan Press, 23-46.

## ***Policy evaluation***

### Guiding questions:

What are the main questions for evaluating social policy? What are some problems in policy evaluation? How is impact evaluation conducted? What are some examples of quantitative and qualitative methods? How have some countries institutionalized policy evaluation?

### Concepts:

Policy implementation, policy evaluation, process study, impact assessment, cost-benefit assessment.

### Literature:

\*Blomquist, John (2003). Impact evaluation of social programs: A policy perspective. Draft paper, 1-36.

Thevenon, Olivier; Gauthier, Anne H. (2011). Family policies in developed countries: a 'fertility-booster' with side-effects, *Community, Work & Family*, Vol. 14, No. 2: 197-216.

Hegewisch, Ariane; Gornick, Janet C. (2011). The impact of work-family policy on employment: a review of research from OECD countries, *Community, Work & Family*, Vol. 14, No. 2: 119-135.

## ***7. Session Wrap-up, discussion and exam***

### Summary points:

Review of key issues, theoretical approaches, methodology and covered data.

### Concepts:

Review of definitions and theory approaches with practical applications.