

Redistribution Policies and Comparative Welfare States

Code: 42717
ECTS Credits: 6

Degree	Type	Year	Semester
4313228 Social Policy, Employment and Welfare	OT	0	2

The proposed teaching and assessment methodology that appear in the guide may be subject to changes as a result of the restrictions to face-to-face class attendance imposed by the health authorities.

Contact

Name: José Antonio Noguera Ferrer

Email: Jose.Noguera@uab.cat

Prerequisites

None.

Use of Languages

Principal working language: spanish (spa)

Objectives and Contextualisation

The module focuses on the analysis and evaluation of different income redistribution mechanisms in contemporary welfare states. Specifically, the module allows the theoretical and empirical study of current social-scientific knowledge on three key issues:

- 1) The theoretical/normative foundations and principles of distributive justice that welfare states aim to implement, as well as their social perception and valuation.
- 2) The role of income guarantee policies in satisfying the redistributive function of welfare states, its comparative study in different countries, and the different alternatives to existing policies.
- 3) The place of these principles and policies in different welfare regimes, in connection with the social-scientific debate on their socio-historical configuration.

Competences

- Design, implement and evaluate social policies and processes for resource redistribution and improvement of citizens' welfare, in different contexts and from a European perspective.
- Put forward innovative proposals for the relevant field of study.
- Recognise the main economic, political, social and cultural transformations of complex societies in order to analyse the fundamental challenges they pose to equality and welfare.
- Use and manage bibliography and IT resources in the field of study.

Learning Outcomes

1. Analyse the main dilemmas or trade-offs implied by the application of various distributive principles to guide social welfare policies in different social and historical contexts.
2. Apply methodologies to evaluate the redistributive effect of the above policies.
3. Construct well-reasoned arguments on the main challenges to the redistributive policies of advanced societies in the current economic crisis.

4. Identify the factors conditioning income policies and family policies in different economic, political, social and cultural contexts.
5. Identify the principal findings from the debate on welfare regimes conducted in the social science literature that deals with contemporary welfare states and use these findings to evaluate several redistributive policies.
6. Identify the principal problems of institutional design and implementation of income guarantee policies and family policies in contemporary welfare states.
7. Put forward innovative proposals for the relevant field of study.
8. Use and manage bibliography and IT resources in the field of study.

Content

Session 1. Distributive justice and redistribution policies

Theories of distributive justice and distributive criteria. The relevance of normative theories for social science and social policy. Utilitarianism. Rawls: justice as equity. The maximin principle.

Reading:

- Rawls, John (1971). *Teoría de la justicia* (Madrid, Fondo de Cultura Económica, 1995), § 1-4, 17, 43 y pp.280-281.

Session 2. Equality and redistribution

The debate on "equality of what?". Sufficiency, priority, and equality. Measurements of redistribution and equality: problems and controversies. Hayek, Nozick, and libertarian critique. Cohen and socialist justice. Other egalitarian theories.

Reading:

- Casal, Paula and Williams, Andrew (2008). "Equality", in C. McKinnon (ed.), *Issues in Political Theory*. Oxford, Oxford University Press, pp.149-171.

Session 3. Redistribution, predistribution, and the welfare state

Distributive justice and the welfare state. Typical problems of institutional design and redistributive policies. Income guarantee policies and the tax system. Predistribution and redistribution. Social investment.

Reading:

- Noguera, José A. (2017). "Redistribución, predistribución y garantía de rentas", in J. Zalakaín and B. Barragué (coords.), *Repensar las políticas sociales: predistribución e inversión social*. Madrid, Editorial Grupo 5 - Kutxa Fundazioa.

Session 4. Universalism vs targeting in redistributive policies

Universalism vs. targeting. Does (and should) the welfare state benefit the worst-off? Means-testing and other targeting methods. The debate on Korpi and Palme's "paradox of redistribution". Targeting within universalism.

Reading:

- Korpi, Walter & Palme, Joakim (1998). "The Paradox of Redistribution and Strategies of Equality: Welfare State Institutions, Inequality, and Poverty in the Western Countries", *American Sociological Review* 63(5):661-687.

Session 5. Income guarantee policies against poverty.

Poverty: concepts, measurement, and indicators. Income guarantee policies and redistribution. Typologies of policies. Types of conditionality. Minimum income schemes in Spain and the European Union. Problems of minimum income schemes.

Readings:

- Noguera, José A. (2019). "Las rentas mínimas autonómicas en España: balance y retos de futuro", in J. Sevilla (ed.), *Reforzar el bienestar social: del ingreso mínimo a la renta básica*. Madrid, Observatorio Social de La Caixa.
- Aguilar-Hendrickson, Manuel & Arriba, Ana (2020). "Out of the wilderness? The coming back of the debate on minimum income in Spain and the Great Recession", *Social Policy & Administration*, 54(4):556-573.

Session 6. Recent reforms and alternative proposals in income guarantee policy.

Main reforms of income guarantee policies. Tax-benefit integration. Workfare and in-work benefits; tax credits and wage supplements. Beyond conditionality: guaranteed income, universal basic income, and negative income tax. The income guarantee policy responses to the Covid-19 pandemics.

Readings:

- Ayala, Luis and Paniagua, Milagros (2019). "Los complementos salariales y la garantía de ingresos: posibilidades y límites", in J. Sevilla (ed.), *Reforzar el bienestar social: del ingreso mínimo a la renta básica*. Madrid, Observatorio Social de La Caixa.
- Noguera, José A. (2019). "La Renta Básica universal: un estado de la cuestión", *VIII Informe FOESSA sobre exclusión y desarrollo social en España*. Madrid, Fundación FOESSA-Cáritas.

Session 7. Preferences for redistribution and social perceptions of distributive justice.

Our intuitive ideas about distributive justice. Strong reciprocity. Research on attitudes toward the welfare state. Main findings. Determinants of social support for income guarantee and redistributive policies.

Reading:

- Bowles, Samuel and Gintis, Herbert (2000). "¿Ha pasado de moda la igualdad? El *Homo reciprocans* y el futuro de las políticas igualitaristas", in Roberto Gargarella and Félix Ovejero (eds.), *Razones para el socialismo*. Barcelona, Paidós, 2001.

Session 8. Behavioural revolution in the social sciences and redistributive policies

Experimental research on heuristics and biases. Prosocial motivations and support for redistribution. The framing of income guarantee policies. Nudging applied to income guarantee policies. Deservingness heuristics.

Reading:

- Van Oorschot, Wim and Roosma, Femke (2017). "The Social Legitimacy of Targeted Welfare and Welfare Deservingness", in W. Van Oorschot, F. Roosma, B. Meuleman y T. Reeskens (eds.), *The Social Legitimacy of Targeted Welfare. Attitudes to Welfare Deservingness*. Cheltenham, Edward Elgar.

Methodology

The module will be structured along several types of teaching methodologies:

1. Lectures in the first part of the sessions.
2. Seminars on the analysis of readings and case studies in the second part of the sessions.
3. Follow-up tuitions.
4. Possibility of presentations by students (to be agreed with the professor).

Annotation: Within the schedule set by the centre or degree programme, 15 minutes of one class will be reserved for students to evaluate their lecturers and their courses or modules through questionnaires.

Activities

Title	Hours	ECTS	Learning Outcomes
Type: Directed			
Activities in the classroom	32	1.28	1, 5, 2, 3, 4, 6, 7, 8
Other training activities	68	2.72	1, 5, 3, 4

Assessment

The evaluation of the module will be based on the following two aspects:

- 1) Oral presentation, attendance to the sessions (which is compulsory) and active participation in class, especially with regard to the discussion on compulsory readings (50% of the final grade).
- 2) An essay of 5000 words (50% of the final grade). This essay must conform to the following guidelines:
 1. In general, it will have to follow the structure of an academic paper.
 2. The topic must have been previously agreed with the professors of the module.
 3. The topic should be related to the module's contents and / or compulsory readings.
 4. The essay may consist, if applicable, on the theoretical part of the master's final thesis.
 5. The essay's main thesis should be supported with arguments and relevant evidence: "opinion" or impressionistic essays will not be accepted.
 6. Formal incorrectness in the presentation of the work (writing, spelling, bibliographic citations, etc.) may be a reason for fail.

Assessment Activities

Title	Weighting	Hours	ECTS	Learning Outcomes
Essay	50%	40	1.6	1, 5, 2, 3, 4, 6, 7, 8
Oral presentation, attendance to sessions and active participation in class	50%	10	0.4	1, 5, 2, 3, 4, 6, 7, 8

Bibliography

Apart from the compulsory readings referenced in the contents section, students may use the following supplementary materials:

Aguilar, M., Arriba, A. & Moreno, G. (2019). "La garantía de ingresos mínimos". En FOESSA, *VIII Informe FOESSA*. Madrid: FOESSA.

Arnsperger, Christian y Van Parijs, Philippe (2000). *Ética económica y social. Teorías de la sociedad justa*. Barcelona, Paidós, 2002.

Arriba, A. & Aguilar Hendrickson, M. (2019): "Crisis económica y transformaciones de la política de ingresos mínimos para la población activa", *Panorama Social*, 29: 91-107.

Ayala, L., Arranz, J. M. & García Serrano, C. (2018): "Minimum Income Benefits in Spain: Impact on Poverty and Dynamics", *EQUALITAS Working Paper*, 54.

- Ayala, L., Arranz, J. M., García Serrano, C. & Martínez Virto, L. (2016): *El sistema de garantía de ingresos en España: tendencias, resultados y necesidades de reforma. Proyecto PROGRESS*. Madrid: Ministerio de Sanidad, Consumo y Bienestar Social.
- Barry, Brian. (1990). "The Welfare State versus the Relief of Poverty", *Ethics*, vol. 100, nº 3 (abril).
- Bergantiños, N., Font, R. & Bacigalupe, A. (2017): "Las rentas mínimas de inserción en época de crisis. ¿Existen diferencias en la respuesta de las comunidades autónomas?" *Papers*, 102(3): 399-420.
- Casal, Paula & Williams, Andrew (2008): "Equality", en C. McKinnon (ed.), *Issues in Political Theory*. Oxford, Oxford University Press, 149-171.
- CES (2017): *Informe sobre políticas públicas para combatir la pobreza en España*. Madrid: Consejo Económico y Social.
- Clayton, Matthew y Williams, Andrew (eds.) (2000). *The Ideal of Equality*. Londres, MacMillan.
- Crepaldi, C. (ed.) (2017): *Minimum Income Policies in EU Member States*. Brussels: European Parliament.
- De la Rica, S. & Gorjón, L. (2017): "Assessing the Impact of a Minimum Income Scheme in the Basque Country", *Working Paper Fedea, Estudios sobre la Economía Española - 2017/16*.
- De Wispelaere, J. & Noguera, J.A. (2012): "On the Political Feasibility of the Basic Income Guarantee", in R. Caputo (ed.), *Basic Income Guarantee and Politics: International Experiences and Perspectives on the Viability of Income Guarantee*. New York: Palgrave.
- Elster, Jon (1992). *Local Justice*. New York, Russell Sage Foundation.
- Fitzpatrick, Tony (2001). *Welfare Theory* (New York, Palgrave).
- Fernández, G. (ed.) (2015): *Hacia un sistema más inclusivo de garantía de rentas en España*. Madrid: Fundación FOESSA-Cáritas.
- Frazer, H. & Marlier, E. (2016): *Minimum Income Schemes in Europe. A study of national policies 2015*. European Social Policy Network.
- Gargarella, Roberto y Ovejero, Félix (comps.) (2001). *Razones para el socialismo* (Barcelona, Paidós).
- Goodin, Robert E. (1988). *Reasons for Welfare: The Political Theory of the Welfare State* (Princeton, N.J.: Princeton University Press).
- Goodin, Robert E. y Le Grand, Julian (1987). "Not Only the Poor", Cap. 10 de *Not Only the Poor. The Middle Classes and the Welfare State* (Londres, Allen & Unwin).
- Groot, L. et al. (2018): "Welfare States' Social Investment Strategies and the Emergence of Dutch Experiments on a Minimum Income Guarantee", *Social Policy & Society*, 18 (2): 277-287.
- Guillén, A. M. & León, M. (eds.) (2011): *The Spanish welfare state in European context*. Londres: Ashgate.
- Korpi, Walter & Palme, Joakim (1998). "The Paradox of Redistribution and Strategies of Equality: Welfare State Institutions, Inequality, and Poverty in the Western Countries", *American Sociological Review* 63(5):661-687.
- Le Grand, Julian (1997). "¿Caballeros, pícaros o subordinados? Acerca del comportamiento humano y la política social", *Desarrollo Económico*, vol. 38, nº 151 (octubre-diciembre 1998).
- LeGrand, Julian (2003). *Motivation, agency, and public policy: of knights and knaves, pawns and queens*. Oxford, Oxford University Press.
- Marinescu, I. (2018): "No Strings Attached. The Behavioral Effects of U.S. Unconditional Cash Transfer Programs", *NBER Working Paper* nº 24337, February.

- Merkel, Wolfgang (2002). "Social justice and the three worlds of welfare capitalism", *Archives européennes de sociologie*, vol. XLIII, n° 1, pp. 59-91.
- Miller, A. (2017): *A Basic Income Handbook*. Edinburgh: Luath Press.
- Moreno, L. (ed.) (2009): *Reformas de las Políticas del Bienestar en España*. Madrid: Siglo XXI.
- Moreno-Fuentes, F. J. & Mari-Klose, P. (eds.) (2015): *The Mediterranean Welfare Regime and the Economic Crisis*. Oxon: Routledge.
- Natili, M. (2019): *The Politics of Minimum Income. Explaining Path Departure and Policy Reversal in the Age of Austerity*. Basingstoke-New York: Palgrave Macmillan.
- Noguera, J. A. (2017): "Modelos de políticas de garantía de rentas contra la pobreza", in M. Kölling & P. Mari-Klose (eds.), *Los retos del Estado del bienestar ante las nuevas desigualdades*. Zaragoza: Fundación Manuel Giménez Abad.
- Noguera, J. A. (2019a): "The Political Debate on Basic Income and Welfare Reform in Spain", *Social Policy & Society*, 18(2): 289-299.
- Noguera, J. A. (2019b): "La Renta Básica universal: un estado de la cuestión", *VIII Informe FOESSA sobre Inclusión y Desarrollo Social en España*. Madrid: Fundación FOESSA.
- Noguera, J. A. (2019c): "The Second-Best Road Ahead for Basic Income", *Comparative Labor Law & Policy Journal*, 40 (2): 223-238.
- OECD (2017): "Basic income as a policy option: can it add up?", *Policy Brief on the Future of Work*. Paris: OECD Publishing. May.
- Olafsson, S., Daly, M., Kangas, O. & Palme, J. (2018): *Welfare and the Great Recession: A comparative study*. Oxford: Oxford Scholarship Online.
- Rodríguez Cabrero, G. (ed.) (2015): *ESPN Thematic Report on Minimum Income Schemes: Spain*. Brussels: European Commission.
- SiiS-Centro de Documentación y Estudios (2019): *Deducciones fiscales reembolsables: Revisión internacional*. Donostia: Fundación Eguía Careaga.
- Thaler, Richard & Sunstein, Cass (2009). *Nudge. Improving Decisions About Health, Wealth, and Happiness* (New Haven, Yale University Press).
- Titmuss, Richard (1987). *The Philosophy of Welfare* (London, Allen & Unwin).
- Esping-Andersen et al. *Why We Need a New Welfare State*. Oxford: Oxford University Press. pp. 26-67.
- Van Parijs, P. y Vanderborght, Y. (2017): *Basic income: a radical proposal for a free society and a sane economy*. Harvard: Harvard University Press.
- Widerquist, K., Noguera, J. A, Vanderborght, Y. & De Wispelaere, J. (eds.) (2013); *Basic Income: An Anthology of Contemporary Research*. Oxford: Wiley-Blackwell.
- Zalakain, J. (2014): "El papel de los sistemas de garantía de ingresos en el abordaje de la pobreza en el empleo: la experiencia del país vasco", *Lan Harremanak*, 31: 36-62.
- Zalakain, J. (2019): "La fiscalización de las políticas sociales: funcionamiento e impacto de las deducciones fiscales reembolsables". *Zerbitzuan*, 68.

Software

Provided by UAB

