

The Chinese University of Hong Kong

Department of Social Work

2008/09 1st Term

SWK 6061: Comparative Social Security Systems

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1. Course Objectives

Upon completion of this course, the expected learning outcomes of the students are as follows:

1. Knowledge: Acquire a comparative perspective on contemporary social security systems.
2. Knowledge: Learning about the cross-national variations in the characteristics, traditions, major programmes and outcomes of different social security systems
3. Skill: using systematic analytical frameworks and tools to analyze current issues and debates in social security policies such as the impact of globalization and population aging, affordability and equity, reform strategies
4. Skill: collecting data and compare the pros and cons of specific programmes such as social assistance, health care and pensions of different countries
5. Value: Concern the livelihood of the deprived and vulnerable groups and prepare to use social security policies and programmes as macro social work practice to improve their livelihood.

2. Methods of instruction

The course will employ the following methods of instruction:

- a. *Lectures* – The instructor will introduce relevant concepts and themes during lectures. Students are encouraged to raise their areas of concern in the lectures and participate in the discussions initiated by the instructor.
- b. *Field Visits and Experiential Learning* – Students will conduct visit to social security agencies and clients to understand real context and practice of social security administration.
- c. *Group project presentation*– Students are required to make group presentations in two

lectures. The process of preparation for the group presentation is meant for the students' consolidation of knowledge acquired from the lectures and readings and integrate their learning in the class.

- d. *WebCT forum* – Students are encouraged to make use of the WebCT forum to discuss relevant issues with the instructor and other students outside the classroom
- e. *Readings* – Students **have to** read the essential readings stipulated for each lecture sessions. Required readings are also stipulated for the major themes included in the course. Students are also encouraged to consult other readings listed in the reference list.
- f. *Audio-visual aid* - Whenever appropriate, audio-visual materials will be used in class to aid the instruction.

3. Course Content and Tentative Course Schedule

<i>Week</i>	<i>Topics and Readings</i>
1	<p>1. Course Introduction</p> <p>2. Comparative Social Policies</p> <ul style="list-style-type: none"> ● Significance of comparative social policies ● Convergence vs. Divergences ● Theoretical vs. Practical <p>3. Comparative Social Security</p> <ul style="list-style-type: none"> ● Values & Ideologies context ● Political, Economic and Social context ● Policies options and alternatives ● Evaluation and Impact assessment <p>Essential Reading:</p> <p>#1 Dixon, J. (1999). Comparative Social Security: The Challenge of Evaluation, <i>Journal of Comparative Policy Analysis: Research and practice 1</i>: 61-95.</p> <p>Readings:</p> <p>Hill, M. J. (2006). Social Policy in modern world: a comparative text. Oxford: Blackwell.</p> <p>張桂琳、彭潤金等著 <七國社會保障制度研究—兼論我國社會保障制度建設> 北京: 中國政法大學出版社。第一章 頁 1-13.</p>

2	<p>Social security: definition and choices</p> <p>Social Security as a strategy to combat poverty and economic insecurity</p> <ul style="list-style-type: none"> ● Concepts, definitions, objectives and scope ● Historical trends in social security development ● Types and branches of social security provisions and their underpinning values ● Essential features of social security systems <p>Essential Reading:</p> <p>#2 ILO (2006). Social Security for all: investing in global social and economic development. A consultation. Geneva: ILO.</p> <p>Readings:</p> <p>張桂琳、彭潤金等著 <七國社會保障制度研究—兼論我國社會保障制度建設> 北京: 中國政法大學出版社。第二及第三章 頁 15-78.</p>
3	<p>Economic Insecurity under Globalisation</p> <ul style="list-style-type: none"> ● NIDL/CIDL and World System Theory ● From Fordist mode of production to Flexible Accumulation ● Restructuring and Regional Economy ● The Impact of Globalizing Agents: IMF, WTO <p>Essential Readings:</p> <p>#3 Lee Kim Ming and Wong Hung (2004). 'Marginalized Workers in Postindustrial Hong Kong' in Journal of Comparative Asian Development, Vol.3, No.2, 249-280.</p> <p>Readings:</p> <p>Higgort, R. & Reich, S. (1998). Globalisation and Sites of Conflict: Towards Definition and Taxonomy</p> <p>Anderson, Richard G. and Gascon, Charles S.,The Perils of</p>

	<p>Globalization: Offshoring and Economic Insecurity of the American Worker(February 2007). FRB of St. Louis Working Paper No. 2007-004A. Available at SSRN: http://ssrn.com/abstract=962450</p>
4	<p>Changes and Reforms in Social Security and Welfare Policies</p> <ul style="list-style-type: none"> ● The Neo-classical ideology and New Right Governments ● Managerialism: efficient means more complex and targeting social policies ● From Welfare to Workfare ● Universal vs. Selective ● Needs, Rights vs. Responsibilities ● Risk and uncertainty <p>Essential Reading: #4 Sinfield, A. (2001) ‘Managing Social Security for What?’ In D. Pieters (ed.) Confidence and Changes: Managing Social Protection in the New Millennium. London: Kluwer Law International. pp.143-161.</p> <p>Readings:</p> <p>Diamond, P. A. (2002). Social Security Reform. Oxford: Oxford University Press.</p> <p>Hyde, M., Dixon, J., Drover, G. (2006). The Privatization of Mandatory Retirement Income Protection: International Perspectives. Lewiston: Edwin Mellen Press.</p>
5	<p>Old age and retirement protection: How many Pillars?</p> <ul style="list-style-type: none"> ● Poverty and economic insecurity in old age ● Measures to relieve economic insecurity and hardship in old age –options, strengths and weakness ● Income support (selectivity) vs. Pension (universality) ● Defined Benefit (DB) /Pay As You Go (PAYG) [Old age pension/ Old age income protection] vs.

	<p style="text-align: center;">Defined Contribution/ (MPF)</p> <ul style="list-style-type: none"> ● Public & Private Mix <p>Essential Reading: #5 Holzmann & Stiglitz (2001) (eds.) New Ideas about Old Age Security. Washington, D.C.: The World Bank. Chapter 1 to Chapter 3.</p> <p>Readings: Rein, M. & Schmähl, W. (2004). Rethinking the Welfare State: The Political Economy of Pension Reform. Cheltenham: Edward Elgar.</p> <p>Galasso, V. (2006). The Political Future of Social Security in Aging Societies. Cambridge, Massachusetts: MIT Press. Chapter 1 to Chapter 4.</p>
6	<p>Income Support as Safety Net</p> <ul style="list-style-type: none"> ● The system and implementation of CSSA in Hong Kong and ‘minimal living standard’ (低保) in China and income support reforms in Western countries ● Does income reduce poverty or provide a poverty trap? ● Interaction with unemployment benefits and Children and Family benefits ● Time-limited Assistance
7	<p>Unemployment Benefit and ALMPs</p> <ul style="list-style-type: none"> ● Trends and characteristics ● Measures to solve unemployment and underemployment <ul style="list-style-type: none"> ■ Unemployment Insurance ■ Form passive protection and active labour market policy (ALMP) ■ From ‘welfare’ to ‘workfare’ ■ Employability <p>d’ Aspremont, C. (et al.) (2002) (eds.) Institutional and Financial Incentives for social Insurance. Boston: Kluwer academic publishers.</p>

	<p>De Jong, P. R. & Marmor, T. R. (1997). <i>Social Policy and the Labour Market</i>. Aldershot: Ashgate.</p> <p>OECD (1999). <i>Benefit Systems and Work Incentives</i>. Paris: OECD.</p> <p>Vroman, W. & Brusentsev, V. (2005). <i>Unemployment Compensation Throughout the World: A Comparative Analysis</i>. Kalamazoo, Michigan: W.E. Upjohn Institute for Employment Research.</p> <p>呂大樂、王卓祺 (1999) <i>失業、貧窮與政府的承擔</i>。香港: 香港中文大學香港亞太研究所。</p>
8	<p>Field Visit</p> <ul style="list-style-type: none"> ● unemployed, working poor and elderly received social security
<i>Week(s)</i>	<i>Topics and Readings</i>
9	<p>Affordable and Sustainable Health Care: The Financial Arrange</p> <ul style="list-style-type: none"> ● Access to affordable and sustainable health care: problems and options ● Financing Options: <ul style="list-style-type: none"> ■ Compulsory Savings ■ Social Insurance ■ Private Insurance ● Alternative Options: <ul style="list-style-type: none"> ■ Primary Health Care ■ Alternative Medicine
10	<p>How to Evaluate Performance of Individual policy and Social Security System.</p> <ul style="list-style-type: none"> ■ Coverage/Take up Rate ■ Equity/ Justice/Efficient ■ Performances/Impacts <p>Indicators: Human Development, Quality of Life</p>
11	Presentation I: Welfare and Political Regimes: comparison for the

	formation of social security systems of Sweden, UK and USA
12	<p>Presentation II: Path and historical development: Compare the convergence and divergence of HK, China and Taiwan social security system</p> <p>Yin, J. Z. , Lin, S. & Gates, D. F. (2000.) (eds.) Social Security Reform: Options for China. Singapore: World Scientific.</p>
13	<p>Conclusion and Evaluation</p> <ul style="list-style-type: none"> ● Issues and criticisms of social security programs in combating insecurity and poverty ● Debates and controversies on future development of social security <p>Integration of social security and other public and social measures</p>

4. Course Requirements

1. Class Attendance: at least 70% of the total lecture hours. (Any student who fails to fulfill this requirement will obtain a Failure grade for this course)
2. Assessment and Assignments:

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| 1 | <p>Presentation:</p> <ul style="list-style-type: none"> ◆ Students will be divided in four groups with two to three members per group. The four groups will present their finding and analysis in comparing social security system (choose one of the following: old age pension/ retirement benefit, social protection, unemployment or medical care in different countries in week 11 (Sweden, USA, UK) and week 12. (HK, China and Taiwan) ◆ Each group will have 35 minutes for their presentation and 15 minutes for question and discussion. The total presentation should be less than 50 minutes. ◆ Suggested Outline: <ul style="list-style-type: none"> ● Compare the similarity and dissimilarity of the selected social security policy/programme in the three countries/ regions: | 20% |
|---|--|-----|

- Political, economical and social context of historical and current development of the policy.
- Ideology and values behind the choose of the policy
- The content: coverage, eligibility, funding and administration of the policy
- The impacts and problems of the policy
- Evaluation and Reflection: Lesson to be learned from the experience in these countries in the context of development of social security policy in Hong Kong and China

2 **Reflection Journal** 15%

A Field Visit will be held on week 8, students are expected to write a reflection journal about the field visit to reflect their experiences and concepts on social security issues and the provision of social security in Hong Kong. The length of the journal should be about 1500 words in Chinese or 2000 words in English. The deadline of submission of the reflection journal is 8 Nov., 2008

2 **Quiz:** 15%

- Students are required to take a quiz of 20 multiple choice questions.

There will be questions on both theory and concepts of social security policies.

The Quiz will be held at 7:00 pm on 3 Dec 2008 at HYS 303. The duration is 2 hours.

3. **Term Paper:** 50%

- Students are required to write a term paper according to their presentation. The term paper should be an individual analysis and reflection with comparative perspective.
- The length of the term paper should be around 3500 words (in English) or 4000 words (in Chinese)

The deadline of submission is 1 December 2008 (Friday), and the paper should be handed through WebCT

■ **Honesty in academic work**

■ Attention is drawn to University policy and regulations on honesty in academic work, and to the disciplinary guidelines and procedures applicable to breaches of such policy and regulations. Details may be found at

<http://www.cuhk.edu.hk/policy/academichonesty/>. With each assignment, students will be required to submit a statement that they are aware of these policies, regulations, guidelines and procedures.

5. Essential References:

Essential Internet Resources:

International Social Security Association	http://www.issa.int/	The ISSA Social Security Web portal provides comprehensive information, news, data and analysis on social security developments worldwide.
Global Extension of Social Security -- ILO	http://www.ilo.org/gimi/gess/ShowMainPage.do	- A complete set of resources, tools, training and technical assistance to design and implement strategies for extension adapted to national and local contexts.
World Bank	http://www.worldbank.org/	Statistical data and programme evaluation of social security in various countries
中國社會保障網	http://www.cnss.cn/	Web portal on social security in Mainland China

- Essential References

Alcock, P., (1993, 1997). *Understanding Poverty*, London: Macmillan.

Dixon, John (1999.) *Social Security in Global Perspective*. Westport, Connecticut: Praeger.

黃洪，李劍明，(2001) 《困局,排斥與出路:香港「邊緣勞工」質性研究》，香港「邊緣勞工」研究之二，香港:樂施會。

莫泰基，(1999) 《香港減貧政策探索:社會發展的構思》，香港:香港三聯書店(香港)有限公司。

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魏新武 (編) (2003)。社會保障世紀回眸。北京:中國社會科學出版社。

General References on specific topics:

- * Recommended Reference

- **Globalisation**

Amin, S., (1997) *Capitalism in the age of globalization : the management of contemporary society* , London: Zed Books.

*Cohen, R., (1987) *The New Helots: Migrants in the International Division of Labour*, Aldershot: Gower.

Frobel, F., Heinrichs, J. and Kreye, O., (1980) *The New International Division of Labour: Structural Unemployment in Industrialised Countries and Industrialisation in Developing Countries*, Cambridge: Cambridge University Press.

IMF(International Monetary Fund), (1997) World Economic Outlook,(May) *Globalization: Opportunity and Challenges*, Washington, DC: IMF.

UNCTAD, (1997) *Trade and Development Report: Globalization, Distribution and Growth*, New York: United Nations.

- **Flexible Accumulation**

Atkinson, J., (1985) “Flexibility: Planning for an Uncertain Future”, *Manpower Policy and Practice*, 1, Summer, 26-9.

Doeringer, P.B. and Piore, M.J., (1971) *Internal Labour Markets and Manpower Analysis*, Lexington: D.C. Heath.

*Lash, S. and Urry, S., (1987) *The End of Organized Capitalism*, Cambridge: Polity Press.

Lipietz, A., (1987) *Mirages and Miracles: The Crises of Global Fordism* (David Macey, Trans.), London: Verso.

Sassen, S., (1988) *The Mobility of Labor and Capital*, Cambridge: Cambridge University Press.

*Sassen, S., (1998) *Globalization and its Discontents* New York: New York Press.

● **Restructuring**

Hakim, C., (1995) "Workforce Restructuring in Cross-national Perspective", *Work, Employment and Society*, 9: 2, 379-88.

Lui, T.L. and Chiu, S., (1993) "Industrial Restructuring and Labour-market Adjustment Under Positive Noninterventionism: The Case of Hong Kong", *Environment and Planning*, 25, 63-79.

Offe, C., (1985) *Disorganized Capitalism: Contemporary Transformations of Work and Politics*, Cambridge: Polity.

Suen, W., (1995) "Sectoral Shifts: Impact on Hong Kong Workers", *The Journal of International Trade and Development* 4 (July), 135-152.

*Wong, H., (1997) "Marginalization of Hong Kong Labour: The Impact of Economic Reunification of China and Hong Kong", Beatrice Leung and Joseph Cheng (eds.), *Hong Kong SAR: In pursuit of Domestic and International Order*, Hong Kong: Chinese University Press. pp.73-96.

● **Poverty**

*Atkinson, A.B., (1989) *Poverty and Social Security*, Harvester/ Wheatsheaf.

Bauman, Zygmunt, (1998) *Work, Consumption and the New Poor*, Buckingham: Open University Press.

Oppenheim, C. and Harker, L., (1996) *Poverty: the Facts, Revised and Updated* (3rd edn.), London: CPAG.

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Townsend, P., (1979) *Poverty in United Kingdom: a Survey of Household Resources and Standards of Living*, London: Penguin.

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*World Bank, (2000) *World Development Report 2000/2001: Attacking Poverty*, Oxford: Oxford University Press.

● **Basic Need**

Bradshaw, J. and Ernst, J. (1990) *Establishing a Modest but adequate Budget for a British Family*. York: University of York, Family Budget Unit.

Bradshaw, J. (ed.) (1993a). *Budget Standards for the United Kingdom*. Aldershot: Avebury.

Bradshaw, J. (ed.) (1993b). *Household Budgets and Living Standards*. London: J R Foundation.

Department of Social Security, (1993) *Households Below Average Income: A Statistical Analysis 1979-90/91*, London: HMSO

Rowntree, B.S., (1941) *Poverty and Progress: a Second Survey of York*, London: Longman.

● **Social Capital**

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Coleman, J. S., (1988) "Social Capital in the Creation of Human Capital", *American Journal of Sociology*, 94, 95-120.

*Collier, P., (1998) *Social Capital and Poverty*, Washington, D.C.:World Bank.

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林南 (2001)。社會資本:爭鳴的範式和實證的檢驗。香港社會學學報, (2), 1-38。

● Social Exclusion

Atkinson, R. (1999) "Citizenship and the struggle against social exclusion in the context of welfare state reform", J. Bussemaker (ed.), *Citizenship and Welfare State Reform in Europe*, London: Routledge, pp.149-166.

Berghman, J. (1995) "Social Exclusion in Europe: Policy Context and Analytical Framework", Room G. (ed.), *Beyond the Threshold*, Bristol: the Polity Press, 10-28

Campbell, Mike (2000) "Labour Market Exclusion and Inclusion", Janie Percy-Smith (ed.), *Policy Responses to Social Exclusion: Towards Inclusion?*, Buckingham: Open University Press, 22-42.

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Defourny, Jacques, Favreau, Louis and Laville, Jean-Louis, (2001) "Introduction to an International Evaluation", Roger Spear et al. (eds.), *Tackling Social Exclusion in Europe: The Contribution of the Social Economy*, Aldershot: Ashgate, 3-28.

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● **Social Security**

Dixon, J. E. & Hyde, M. (eds.) (2001) *The Marketization of Social Security*. Westport, Connecticut: Quorum Books.

Fox, L. & Palmer, E. (2001). 'New Approaches to Multipillar Pension Systems: What in the World is Going On?' In Holzmann, R. & Stiglitz, J.E. (eds.) *New Ideas about Old Age Security*. Washington, D.C.: The World Bank. Pp 90-132.

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Vail, J. & Wheelock, J & Hill, M. (eds.) (1999). *Insecure Times: Living with Insecurity in Contemporary Society*. London: Routledge.

● **Community Economic Development**

European Commission, (1997b) *Community Involvement in Urban Regeneration: added value and changing value*,. Luxembourg: Office for Official Publication of the European Communities.

Giloth, R.P., (1998) "Jobs, Wealth, or Place: The Faces of Community Economic Development", Sherraden, M.S. and Nimacs, W.A. (eds.), *Community Economic Development and Social Work*. Binghamton, NY: The Haworth Press, pp.11-27.

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● **Book, book chapters, & research report on poverty and social security issues of Hong Kong**

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- Leung, H.C. and Wong, H.K., (2001) *Policy Traps and Injured Identities: The Making of Social Disadvantages in "The Other" Tsuen Wan*, paper present in the Conference on Social Exclusion and Marginality in Chinese Societies, Center for Social Policy Studies, Department of Applied Social Sciences, The Hong Kong Polytechnic University.
- Society For Community Organisation and Hong Kong Human Rights Commission, (1995) *A report to the United Nations Committee on Economic, Social and Cultural Rights on Housing Violations and poverty problem in Hong Kong*, Hong Kong: Society For Community Organisation and Hong Kong Human Rights Commission.
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- *Wong, H., (2000) "The Failure of Social Security in Alleviating Poverty in Hong Kong", *Asia Pacific Journal of Social Work*, Vol. 10, No. 2, September.
- *莫泰基，(1993) 《香港貧窮與社會保障》，香港：中華書局。
- *黃洪，蔡海偉，(1996) 《香港低開支住戶開支模式研究》香港：香港社會服務聯會及樂施會。
- *黃洪 (2000) <<香港九十年代貧窮的原因：微觀、宏觀及中程的分析>> 貧窮與社會發展。香港：社會保障學會及亞洲勞工專訊。pp.3-30.
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