

# 國立臺灣大學國家發展研究所 98 學年度第 2 學期課程綱要

| 課程資訊      |                                                                                                                                                                                                                                                                                                        |    |  |           |         |
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| 課程名稱      | (中)福利國家理論與制度專題                                                                                                                                                                                                                                                                                         |    |  |           |         |
|           | (英) SEMINAR ON THEORIES AND INSTITUTIONS OF THE WELFARE STATE                                                                                                                                                                                                                                          |    |  |           |         |
| 課程編號      | 341 U8750                                                                                                                                                                                                                                                                                              | 班次 |  | 學分數       | 2       |
| 全/半年      | 半年                                                                                                                                                                                                                                                                                                     |    |  | 必/選修      |         |
| 授課教師      | 施世駿                                                                                                                                                                                                                                                                                                    |    |  | 開課系所      | 國家發展研究所 |
| 上課時間      | 星期一下午 7、8 節                                                                                                                                                                                                                                                                                            |    |  | 修課人數      | 15      |
| 上課地點      | 國發 208                                                                                                                                                                                                                                                                                                 |    |  | 課程加選方式    | 3       |
| 博士班核心能力代碼 |                                                                                                                                                                                                                                                                                                        |    |  | 碩士班核心能力代碼 | H       |
| 課程大綱      |                                                                                                                                                                                                                                                                                                        |    |  |           |         |
| 課程目標      | 本課程探討的核心議題是福利國家和社會發展之間的關係。作為二次大戰後最重要的制度，福利國家無疑是西方國家最成功的發展典範，民主自由、市場經濟與社會福利也成為政治、經濟與社會面向上最具體的表徵。同時，這樣的發展典範也成為第三世界發展中國家的效法對象，從而在其他地區也出現類似的福利國家制度。然而隨著時間的演進，西方與第三世界的福利國家發展卻逐漸面臨瓶頸，必須面對日益分歧的社會結構與全球化、區域化的挑戰。如何解釋這些變遷，以及福利國家制度變化與政策發展，便成為福利國家研究的重要課題。                                                       |    |  |           |         |
| 課程概述      | 這門課程的中心主軸將放在相關的理論討論，以突顯西方以及東亞福利國家歷史發展的政治、經濟與社會脈絡。在探討這三個面向的同時，這門課程企圖從歷史比較的觀點了解已開發國家與發展型國家中福利國家與社會發展之間的關係形成，以及他們在全球化的政經脈絡轉變下所面臨的挑戰和改革契機。從這樣的想法出發，這門課程主要分成兩大部份：首先介紹和西方福利國家研究最相關的理論，然後再從比較政治經濟學、以及比較福利國家制度的角度來了解西方相關的研究；接下來將關懷轉向比較東亞研究文獻，以便從比較的眼光理解東亞和臺灣的情形。最後，這個課程回到東亞的脈絡，討論福利國家發展中國家的角色與功能，反省東亞和臺灣發展的經驗。 |    |  |           |         |
| 關鍵字       | 福利國家、社會政策、社會發展                                                                                                                                                                                                                                                                                         |    |  |           |         |
| 課程要求      | 每週主題有「基本閱讀（*標示為必讀）」及「進階閱讀」，上課以討論「基本閱讀」進行。同學應於上課前閱讀完該週指定讀物，並任選 6 週的基本閱讀文獻撰寫各一頁左右的讀書心得以及兩個討論問題給老師，在個別該週的星期五上課以前繳交。此外，修課同學應任選一週題目的所有列出文獻做約 30 分鐘的口頭報告。口頭報告前至少一週與老師先行討論大綱。<br>期末報告：依照口頭報告主題內容撰寫約 10000 字的期末報告。                                                                                             |    |  |           |         |

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| Office Hours | Wed. 10:30 – 12:00                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |             |        |    |
| 參考書目         | <p>Esping-Andersen, G. (1995), Welfare State and the Economy. In: N. J. Smelser and R. Swedberg (eds), <i>The Handbook of Economic Sociology</i>. Princeton, NJ: Princeton University Press. Pp. 711-732.</p> <p>Marshall, T. H. (1949), <i>Citizenship and Social Class and Other Essays</i>. London and Concord, MA: Pluto Press.</p>                                                                                                                                                                                                                                                                                                                                                                |             |        |    |
| 評量方式         | No.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | 項目          | 百分比(%) | 說明 |
|              | 1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | 上課思辯討論表現    | 10     |    |
|              | 2                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | 課堂讀書心得與口頭報告 | 40     |    |
|              | 3                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | 期末報告        | 50     |    |
| 週次           | 單元主題                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |             |        |    |
| 第1週          | 主題：課程介紹                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |             |        |    |
| 第2週          | <p>主題：導論：什麼是福利國家？</p> <p>教材：</p> <p>* Katznelson, I. (1988). ‘The Welfare State as a Contested Institutional Idea’ . <i>Politics and Society</i>, 16 (4): 517-531.</p> <p>Esping-Andersen, G. (1995), Welfare State and the Economy. In: N. J. Smelser and R. Swedberg (eds), <i>The Handbook of Economic Sociology</i>. Princeton, NJ: Princeton University Press. Pp. 711-732.</p> <p>Marshall, T. H. (1949), <i>Citizenship and Social Class and Other Essays</i>. London and Concord, MA: Pluto Press. Pp. 3-51.</p> <p>Titmuss, R. M. (1974), What Is Social Policy? Pp. 23-32 in <i>Social Policy: An Introduction</i> edited by B. Abel-Smith and K. Titmuss. New York, NY: Pantheon Books.</p> |             |        |    |
| 第3週          | <p>主題：福利國家的理論發展概況</p> <p>教材：</p> <p>* Hicks, A. and Esping-Andersen, G. (2005), Comparative and Historical Studies of Public Policy and the Welfare State. In: T. Janoski et al. (eds), <i>The Handbook of Political Sociology: States, Civil Societies, and Globalization</i>. Cambridge: Cambridge University Press. Pp. 509-525.</p> <p>Myles, J. and Quadagno, J. (2002), Political Theories of the Welfare State. <i>Social Service Review</i> (March): 34-57.</p> <p>Pierson, P. (2000), Three Worlds of Welfare State Research. <i>Comparative Political Studies</i> 33 (6/7): 791-821.</p>                                                                                                     |             |        |    |
| 第4週          | <p>主題：福利國家的興起</p> <p>教材：</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |             |        |    |

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|       | <p>*Agassi, J. B. (1991). The Rise of the Ideas of the Welfare state. <i>Philosophy of the Social Sciences</i>, 21:4,444-457</p> <p>*Briggs, A. (1961). The Welfare State in Historical Perspective, <i>European Journal of Sociology</i>, II, pp. 221-258.</p> <p>Ashford, Douglas E. (1986). <i>The Emergence of the Welfare State</i>. Oxford: Basil Blackwell.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 第 5 週 | <p>主題：現代化理論與新馬克斯學派的福利國家觀點</p> <p>教材：</p> <p>* Flora, P. and Alber, J. (1981), Modernization, Democratization, and the Development of Welfare States in Western Europe. Pp. 37-80 in <i>The Development of Welfare States in Europe and America</i>, edited by P. Flora and A. J. Heidenheimer. New Brunswick, NJ: Transaction Books.</p> <p>* Held, D. &amp; Krieger, J. (1983), Accumulation, Legitimation and the State: The Ideas of Claus Offe and Jürgen Habermas. Pp. 487-497 in <i>States and Societies</i>, edited by David Held et al. New York: New York University Press.</p> <p>Wilensky, H. (2002), <i>Rich Democracies: Political Economy, Public Policy, and Performance</i>. Berkeley: University of California Press.</p> <p>Gough, I. (1973), <i>The Political Economy of the Welfare State</i>. London: Macmillan. 古允文譯，1995，<i>《福利國家的政治經濟學》</i>。台北：巨流。</p> <p>Offe, C. (1984), <i>Contradictions of the Welfare State</i>. London: Hutchinson.</p> |
| 第 6 週 | <p>主題：從權力資源理論到國家中心論</p> <p>教材：</p> <p>* Korpi, W. (2000), The Power Resources Model. In: Pierson, C. and Castles, F. G. (eds), <i>The Welfare State Reader</i>. Cambridge: Polity Press. Pp. 77-88.</p> <p>* Skocpol, T. and Amenta, E. (1986). States and Social Policies. <i>Annual Review of Sociology</i> 12: 131-157.</p> <p>Korpi, W. (1989) 'Power, Politics, and State Autonomy in the Development of Social Citizenship: Social Rights during Sickness in eighteen OECD Countries since 1930' , <i>American Sociological Review</i>, 54, 3, 309-328.</p> <p>Skocpol, T. (1985), Bringing the State Back In: Strategies of Analysis in Current Research. In: P. Evans, D. Rueschemeyer and T. Skocpol (eds), <i>Bringing the State Back In</i>. Cambridge: Cambridge University Press. Pp. 3-37.</p>                                                                                                                                                           |
| 第 7 週 | <p>主題：國家或政體中心論與歷史制度論</p> <p>教材：</p> <p>* Amenta, E. (2005), State-Centered and Political Institutional Theory: Retrospect and Prospect. In: T. Janoski et al. (eds), <i>The Handbook of Political Sociology: States, Civil Societies, and Globalization</i>. Cambridge: Cambridge University Press. Pp.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

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|        | <p>96-114.</p> <p>Amenta, E. (2003), What We Know about the Development of Social Policy. In: J. Mahoney and D. Rueschemeyer (eds), <i>Comparative Historical Analysis in the Social Sciences</i>. Cambridge: Cambridge University Press. Pp. 91-130.</p> <p>Skocpol, T. (1992), Introduction. In: T. Skocpol, <i>Protecting Soldiers and Mothers: Political Origins of Social Policy in the United States</i>. Cambridge, MA: Belknap Press of Harvard University Press. Pp. 1-62.</p>                                                                                                                                                                                                                                                                                                                                                                        |
| 第 8 週  | <p>主題：福利國家的比較政治經濟學</p> <p>教材：</p> <p>* Iversen, T. (2005), <i>Capitalism, Democracy, and Welfare</i>. Cambridge: Cambridge University Press. Pp. 3-29.</p> <p>* Schmidt, V. A. (2008), European Political Economy: Labor Out, State Back In, Firm to the Fore. <i>West European Politics</i>, 31 (1-2): 302-320.</p> <p>Hall, P. A. and Soskice, D. (2001), An Introduction to Varieties of Capitalism. In: H. A. Hall and D. Soskice (eds.), <i>Varieties of Capitalism</i>. New York: Oxford University Press. Pp. 1-68.</p> <p>Hancke, B.; Rhodes, M. and Thatcher, M. (2007), <i>Beyond Varieties of Capitalism: Conflict, Contradiction, and Complementarities in the European economy</i>. Oxford: Oxford University Press. Pp. 1-38.</p>                                                                                                                |
| 第 9 週  | <p>主題：期中報告</p> <p>教材：</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 第 10 週 | <p>主題：福利國家與勞資關係</p> <p>教材：</p> <p>* Trampusch, C. (2007). 'Industrial Relations as a Source of Social Policy: A Typology of the Institutional Conditions for Industrial Agreements on Social Benefits' . <i>Social Policy and Administration</i>, 41 (3): 251-270.</p> <p>* Estevez-Abe, M. et al. (2001), Social Protection and the Formation of Skills: A Reinterpretation of the Welfare State. In: H. A. Hall and D. Soskice (eds.), <i>Varieties of Capitalism</i>. New York: Oxford University Press. Pp. 145-183.</p> <p>Thelen, K. (2001), Varieties of Labor Politics in the Developed Democracies. In: H. A. Hall and D. Soskice (eds.), <i>Varieties of Capitalism</i>. New York: Oxford University Press. Pp. 71-103.</p> <p>Kitschelt, H. and Streeck, W. (2004), <i>Germany: Beyond the Stable State</i>. Taylor &amp; Francis. Pp. 101-124.</p> |
| 第 11 週 | <p>主題：福利國家制度的連續與變遷</p> <p>教材：</p> <p>* Streeck, W. and Thelen, K. (2005), <i>Beyond Continuity: Institutional Change in</i></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

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|        | <p><i>Advanced Political Economies</i>. Oxford: Oxford University Press. Pp. 1-39.</p> <p>* Pierson, P. (2000), Increasing Returns, Path Dependence, and the Study of Politics. <i>American Political Science Review</i> 94 (2): 251-267.</p> <p>Clemens, E. S. and Cook, J. (1999), Politics and Institutionalism: Explaining Durability and Change. <i>Annual Review of Sociology</i>, 25: 441-466.</p>                                                                                                                                                                                                                                                                   |
| 第 12 週 | <p>主題：全球化與福利國家</p> <p>教材：</p> <p>* 呂建德(2001)，從福利國家到競爭式國家？全球化與福利國家的危機。《台灣社會學》，2: 263-313.</p> <p>* Genschel, P. (2004), Globalization and the Welfare State: A Retrospective. <i>Journal of European Public Policy</i>, 11 (4): 613-636.</p> <p>Iversen, T. and Wren, A. (1998). 'Equality, Employment, and Budgetary Restraint: The Trilemma of the Service Economy' . <i>World Politics</i>, 50 (4): 507-546.</p> <p>Mishra, R. (1999), Globalization and the Welfare State, Cheltenham: Edward Elgar. Chapter 1.</p>                                                                                                                                                      |
| 第 13 週 | <p>主題：歐洲統合與福利國家</p> <p>教材：</p> <p>* Ferrera, M. (2005), <i>The Boundaries of Welfare: European Integration and the New Spatial Politics of Social Protection</i>. Oxford: Oxford University Press. Chapter 4 (Pp. 111-166).</p> <p>Leibfried, S. (2005), Social Policy: Left to the Judges and the Markets? In: H. Wallace, W. Wallace and M. A. Pollack (eds), <i>Policy-Making in the European Union</i>. Oxford: Oxford University Press. (Pp. 243-278).</p> <p>Kaufmann, F.-X. (2003), <i>Varianten des Wohlfahrtsstaats: Der deutsche Sozialstaat im internationalen Vergleich</i>. Frankfurt/M: Suhrkamp. (中譯本見施世駿譯 2006：比較福利國家。巨流出版公司)，第 6 章。</p>                    |
| 第 14 週 | <p>主題：東亞福利國家的類型</p> <p>教材：</p> <p>* Ku, Y.-W. (2007), Developments in East Asian Welfare Studies. <i>Social Policy and Administration</i>, 41, 2, 115-131. (with Catherine Jones Finer)</p> <p>* 李易駿、古允文（2003）另一個福利世界？東亞發展型福利體制初探。《台灣社會學刊》，31，頁 189-241。</p> <p>Holliday, I. (2000), Productivist Welfare Capitalism: Social Policy in East Asia, <i>Political Studies</i> 48: 706-723.</p> <p>Kwon, H.-J. (1998), Democracy and the Politics of Social Welfare: A Comparative Analysis of Welfare Systems in East Asia, in R. Goodman, G. White and H.-J. Kwon (eds) <i>The East Asian Welfare Model: Welfare Orientalism and State</i>. London: Routledge. Pp. 27-74.</p> |

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| 第 15 週 | <p>主題：台灣福利國家的特性與轉型</p> <p>教材：</p> <p>* Peng, I. and Wong, J. (2008), Institutions and Institutional Purpose: Continuity and Chang in East Asian Social Policy. <i>Politics &amp; Society</i>, 36, 1, 61-88.</p> <p>* Ku, Y.-W. (1997), <i>Welfare Capitalism in Taiwan: State, Economy and Social Policy</i>. Basingstoke: Macmillan Press Ltd. Pp. 19-63.</p> <p>林萬億（2006），《台灣的社會福利：歷史經驗與制度分析》。台北：五南。Pp. 38-74。</p> <p>林國明、蕭新煌（2000），〈台灣的社會福利運動導論：理論與實踐〉。收錄於蕭新煌、林國明編，《台灣的社會福利運動》。台北：巨流，Pp. 1-32。</p>                                                                                                                               |
| 第 16 週 | <p>主題：福利國家與性別</p> <p>教材：</p> <p>* Lewis, J. (2006), Gender and Welfare in Modern Europe. <i>Past and Present</i>, Supplement 1, 39-54.</p> <p>* 陳芬苓、張森林（2008），台灣地區勞工退休金制度的性別分析。《人文及社會科學集刊》，20，1，頁 67-104。</p> <p>藍佩嘉（2007），性別與跨國遷移。黃淑玲、游美惠（編），《性別向度與台灣社會》，台北：巨流，頁 225-248。</p> <p>Orloff, A. S. (1993), Gender and the Social Rights of Citizenship: The Comparative Analysis of Gender Relations and Welfare States. <i>American Sociological Review</i>, 58, 3, 303-328.</p>                                                                                                                                                      |
| 第 17 週 | <p>主題：福利國家與移民</p> <p>教材：</p> <p>* Sainsbury, D. (2006), Immigrants' Social Rights in Comparative Perspective: Welfare Regimes, Forms of Immigration and Immigration Policy Regimes. <i>Journal of European Social Policy</i>, 16, 3, 229-244.</p> <p>* 夏曉鵬（2005）全球化下台灣的移民／移工問題。瞿海源、張芷雲（編），《台灣的社會問題》。台北：巨流。頁328-367。</p> <p>Held, D. et al. (2001), <i>Global Transformations: Politics, Economics and Culture</i>. «全球化大轉變》，沈宗瑞等譯，台北：韋伯文化事業出版社。頁 411-477。</p> <p>Crepaz, M. (2008), <i>Trust beyond Borders: Immigration, the Welfare State, and Identity in Modern Societies</i>. Ann Arbor, MI: University of Michigan Press.</p> |
| 第 18 週 | 期末報告                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |