

社會安全網：理論與實務

Social Safety Nets: Theories & Practices

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課程大綱

9/27 一、課程介紹

相關概念：社會保障（Social Protection）
社會排除（Social Exclusion）
社會福利（Social Welfare）
社會安全（Social Security）
社會安全網（Social Safety Nets）等

10/4 澳洲學者演講（社會學系劉雅靈主任安排）

10/11 二、社會安全體系的主要理論基礎暨模式

1. 主要理論基礎/模式

- (1) . 凱因斯模式（The Keynesian Model）
- (2) . 貝佛里奇模式（The Beveridge Model）
- (3) . 俾斯麥模式（The Bismarck Model）
- (4) . 費邊模式（The Fabian Model）等

Fitzpatrick, Tony, 2001, *Welfare Theory: An Introduction*, UK: Palgrave.

2. 社會安全體系牽涉的課題

- (1) . 政府、市場、社區、家庭和個人的角色
- (2) . 普及 (Universal) Vs. 選擇原則 (Selective)
(範圍)
- (3) . 福利權 (Welfare Rights) Vs. 德政 (Benevolent Conduct) (福利的意識型態)
- (4) . 社會團結的傳統 (The tradition of social solidarity) Vs. 市場競爭 (Market Competition)
- (5) . 福利國家 (Welfare State) Vs. 對亟需者提供社會服務 (Social Provision for the Very Needy) 等

Pierson, Christopher and Francis G. Castles, 2000, *The Welfare State Reader*, Cambridge: Polity Press.

唐文慧、王宏仁合著，2000，*社會福利理論：流派與爭議*，台北：巨流圖書公司印行。

Ian Gough 著、古允文譯，1995，*福利國家的政治經濟學*，台北：巨流圖書公司。
林萬億著，2000，*福利國家—歷史比較的分析*，台北：巨流圖書公司。

3. 社會安全體系帶來之社會政策意涵

如：預算/稅收制度 (Budgetary System)
社會保險制度 (Social Insurance System)
個人帳戶制 (Personal Account System) 等

10/18 影響社會安全體系的因素

1. 人口轉型—第一和第二階段人口轉型
2. 家庭結構變遷
3. 國家財經狀況
4. 價值觀的改變
5. 政治民主化 等

Jones, Kathleen, 2000, *The Making of Social Policy in Britain: From the Poor Law to New Labor*, London: The Athlone Press.

10/25 人口轉型暨其政策意涵—全球視野

11/01

1. 第一階段人口轉型 (The 1st Stage of Population Transition)
2. 第二階段人口轉型 (The 2nd Stage of Population Transition)
3. 政策意涵：
各國經驗 (台灣, 南韓, 日本, 新加坡及其他)

McDonald, Peter, 2005, "Very Low Fertility: Its Causes and Its Remedies", Paper Presented at *International Workshop on Low Fertility and Population Policies*, Seoul: Korea Institute for Health and Social Affairs, July 3-5.

Retherford, Robert, 2005, "Japan's Baby Bust: Causes, Implications and Policy Responses", Paper Presented at *International Workshop on Low Fertility and Population Policies*, Seoul: Korea Institute for Health and Social Affairs, July 3-5.

Lee, Sam-Sik, 2005, "Lowest Fertility and Policy Directions in Korea", Paper Presented at *International Workshop on Low Fertility and Population Policies*, Seoul: Korea Institute for Health and Social Affairs, July 3-5.

Soo, Daphne, 2005, "Singapore's Fertility Challenges", Paper Presented at *International Workshop on Low Fertility and Population Policies*, Seoul: Korea Institute for Health and Social Affairs, July 3-5.

Kim, Minja, 2005, "Marriage, Work, and Family Life in Korea, Japan, and the United States", Paper Presented at *International Workshop on Low Fertility and Population Policies*, Seoul: Korea Institute for Health and Social Affairs, July 3-5.

Chen, Hsiao-hung Nancy (陳小紅), 2005, "Taiwan's Demographic Transition and Its Policy Implications", Paper presented at *International Workshop on Low Fertility and Population Policies*, Seoul: Korea Institute for Health and Social Affairs, July 3-5.

11/08 全球化與社會安全體系

11/15

1. 全球化與勞動議題

- (1). 國際移民—外勞議題
- (2). 國際資本流動, 外包和失業
- (3). 人口販運

2. 政策意涵

各國經驗 (台灣, 中國, 菲律賓, 新加坡, 俄羅斯等)

- Yeates, Nicola, 2001, *Globalization and Social Policy*, London: Sage Publications.
- Esping-Anderson, Gosta, 1990, *The Three Worlds of Welfare Capitalism*, UK: Polity Press.
- Choi, E. Kwan and David Greenaway, 2001, *Globalization and Labor Markets*, UK: Blackwell Publishers.
- Ross, Andrew, 2004, *Low Pay High Profile: The Global Push for Fair Labor*, New York & London: The New Press.
- Chen, Hsiao-hung Nancy (陳小紅), 2003, "A Case Study of Chinese Taipei", in Chanyong Park & Kye Woo Lee (eds.), *Globalization and Social Safety Nets in Asia-Pacific Region*, Seoul, Korea: KIHASA: APEC SSN CBN Head Institution, Ministry of Health and Welfare, pp.49-86.

11/22 期中口頭報告

11/29 人口老化衍生的相關政策

- 12/06
1. 年金暨其改革
 2. 老齡住宅
 3. 長期照顧—醫療及其他
 4. 各國經驗 (歐陸 Vs. 美國 Vs. 亞洲各國)

- The Oxford Institute of Ageing, 2004, *Ageing Society*.
- Research Committee on Sociology of Ageing, International Sociological Association, 2003, *Spring Newsletter 2003*, April.
- Commission of the European Communities, 2002, *Europe's Response to World Ageing: Promoting Economic and Social Progress in Ageing World*, A Contribution of the European Commission to the 2nd World Assembly on Ageing.
- Hans-Joachim Von Kondratowitz, Clemens Tesch-Romer, Andreas Motel-Klingebiel, 2002, "Establishing Systems of Care in Germany: A Long and Winding Road", German Centre of Gerontology, Berlin, Germany, May.
- Estes, Carroll L., 2001, *Social Policy & Aging: A Critical Perspective*, London: Sage Publications.
- Moody, Harry R. 2000, *Aging: Concepts & Controversies*, Third Edition, Thousand Oaks, California: Pine Forge Press.
- Randel, Judith, Tony German and Deborah Ewing, 1999, *The Ageing and Development Report: Poverty, Independence and the World's Older People*, London: Earthscan Publications Ltd.
- 陳小紅, 2006年2月, "「國民年金」模式的探索: 台灣新世紀初社會福利政策的建構", 收錄於郭明政主編, *社會保險之改革與展望*,

台北：政治大學法學院勞動法與社會法研究中心，頁 287-312。

12/13 年金制度暨其背後思維

1. 預算制 (Budgetary System)
2. 社會保險制 (Social Insurance System)
3. 個人帳戶制 (Individual/Personal Account System)
4. 確定給付制 (Defined Benefit) Vs. 確定提撥制 (Defined Contribution)
5. 退休基金管理 (Pension Fund Management) 等

Robert Palacios, 2002, "Managing Public Pension Reserves, Part II: Lessons from Five Recent OECD Initiatives", The World Bank: Social Protection Unit, Human Development Network, July.

Chen, Hsiao-hung Nancy (陳小紅), 2005, "Universal Values Versus Political Ideology: The Virtual Reform Experience of Taiwan's National Pension Plan", in John Doling, Catherine Jones Finer and Tony Maltby (eds.), *Ageing Matters: European Policy Lessons from the East*, UK: Ashgate Publishing Limited, pp. 96-122.

12/20 醫療保險

1. 台灣全民健保制度的實施與改革
2. OECD 國家的經驗

Marmor, Theodore R., 1994, *Understanding Health Care reform*, New Haven and London: Yale University Press.

12/27 貧窮與社會安全網

1. 貧窮與所得分配
2. 貧窮的惡性循環
3. 評析台灣的反貧方案
4. 其他國家經驗

Asian Development Bank, 2002, *Proceedings: Fourth Asia Development Forum on Trade and Poverty Reduction*, December.

Smeeding, Timothy, 2005, "Causes and Conditions of Social Vulnerability: Experience from the LIS Dataset", Paper Presented at APEC

Symposium on Strengthening Social Safety Nets Under Rapid Socioeconomic Changes, Seoul: Ministry of Health and Welfare, South Korea, August 23-24.

Betson, David M., 2005, "Addressing the Needs of the Poor", Paper Presented at *APEC Symposium on Strengthening Social Safety Nets Under Rapid Socioeconomic Changes*, Seoul: Ministry of Health and Welfare, South Korea, August 23-24.

Wiseman, Michael, 2005, "The Multiple Avenues of Impacts and Policy Responses", Paper Presented at *APEC Symposium on Strengthening Social Safety Nets Under Rapid Socioeconomic Changes*, Seoul: Ministry of Health and Welfare, South Korea, August 23-24.

Son, Hyun H., 2005, "On Addressing Pro-poorness of Government Programs: International Comparisons", Paper Presented at *APEC Symposium on Strengthening Social Safety Nets Under Rapid Socioeconomic Changes*, Seoul: Ministry of Health and Welfare, South Korea, August 23-24.

Chen, Hsiao-hung Nancy (陳小紅), 2005年, "War on Poverty: What Has Been Delivered Under Chinese Taipei's Social Safety Nets?", Paper Prepared for SSN/APEC, Seoul, Korea, August 23-24.

陳小紅, 2008, "M型社會的成因及影響--「全球化」的觀點", *M型社會的新貧現象與福利措施*, CARES 中華救助總會社會福利論壇主題演講, 中華救助總會、朝陽科技大學社會工作系主辦, 台中: 朝陽科技大學, 5月2日, 頁21--40。

1/03 福利服務與非政府組織:

1. 現金 Vs. 實物服務
2. 去身分化、去性別化及卻去階層化
3. 公、私部門服務輸送體系
4. 社會服務的民營化 等

National Institute of Population and Social Security Research, Japan, 2002, "Introduction of Japanese Social protection System", December.

Chen, Hsiao-hung Nancy Chen (陳小紅), 2001, "The myth and the reality of privatizing social welfare services: A case study of Taipei city", in Catherine Jones Finer(ed.), *Comparing The Social Policy Experiences of Britain and Taiwan*,(UK: Ashgate Publishing Limited - ISBN07546 14522), pp. 67-91.

Chen, Hsiao-hung Nancy (陳小紅), 2002, "Taiwan" Chapter, in Razali Agus, John Doling, and Dong-sung Lee (eds.), *Housing Policy Systems in South and East Asia*, (UK: Palgrave McMillan), pp. 84-103.

1/10 資源分配與稅收政策

1. 社會福利與稅負：國際比較
2. 現階段台灣的賦稅改革暨其福利意涵 R
3. 政府社會福利預算暨其政策意涵
4. 「工作貧」和「EITC」

Alstott, Anne L., 1995, "The Earned Income Tax Credit and the Limitations of Tax-Based Welfare Reform", *Harvard Law Review*, Vol. 108, No. 3, January, pp. 533–592.

Barr, Nicholas, 1993, *The Economics of the Welfare State*, 2nd edition, Stanford, CA: Stanford University Press.

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Ellwood, David T., 2000, "The Impact of the Earned Income Tax Credit and Social Policy Reforms on Work, Marriage, and Living Arrangements".

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Greenstein, Robert, 2005, "The Earned Income Tax Credit: Boosting Employment, Aiding the Working Poor", Washington, D. C.: Center on Budget and Policy Priorities.

Leigh, Andrew, 2005, "Optimal Design of Earned Income Tax Credits: Evidence from a British Natural Experiment", *Discussion Paper No. 488*, Center for Economic Policy Research, The Australian National University.

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Ventry, Dennis J., Jr., "The Collision of Tax and Welfare Politics: The Political History of the Earned Income Tax Credit, 1969-99".

陳小紅，2009年11月，*勤勞所得租稅補貼制度之福利面分析*，台北：行政院財政部賦稅署委託研究。

陳小紅，2009年2月，"淺釋新貧現象與社會福利政策之規劃—由「工作所得補助方案切入」"，*主計月刊*，第638期，頁13-18。

1/17 台灣社會福利的未來為何？

1. 向右？向左？或走第三條路？

2. 經濟發展和社會安全體系間之關係

- Holmlund, Bertil, Agnar Sandmo and Erling Steigum (eds.), 2000, *Social Security in the 21st Century*, Oxford: Blackwell Publishers.
- Holliday, Ian and Paul Wilding, (eds.), 2003, *Welfare Capitalism in East Asia: Social Policy in the Tiger Economies*, UK: Palgrave Macmillan.
- Taylor-Gooby, Peter, 2005, "Problems and Issues in Strengthening Social Safety Nets: Cases of Developed Countries", Paper Presented at *APEC Symposium on Strengthening Social Safety Nets Under Rapid Socioeconomic Changes*, Seoul: Ministry of Health and Welfare, South Korea, August 23-24.
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- Norris, Donalds F. and Lyke Thompson (eds.), 1995, *The Politics of Welfare Reform*, London: Sage Publications.
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- Chen, Hsiao-hung Nancy (陳小紅), 2008, "台灣社會政策的發展、啟示與展望", *第四屆社會政策國際論壇論文--東亞社會政策的形成與發展*, 中國上海, July 17.
- Chen, Hsiao-hung Nancy (陳小紅), 2003, "Paradigm shifts in social welfare policy-making in China: struggling between economic efficiency and social equity", in Catherine Jones Finer, (ed.), *Social Policy Reform in China: Views from Home and Abroad*, UK: Ashgate Publishing Limited, pp. 51-68.
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- 陳小紅, 2013, "我國的社會福利制度暨其永續發展", *社區參與與公平正義*, 第三章, 永續發展教育系列叢書, 台北: 國家教育研究院。

1/24 結語：亟待強化之比較研究 期末報告

Esping-Anderson, Duncan Gallie, Anton Hemerijck and John Myles, 2002,

- Why We Need A New Welfare State*, UK: Oxford University Press.
- Pierson, Christopher, 2001, *Beyond the Welfare State? The New Political Economy of Welfare*, 2nd edition, Cambridge: Polity Press.
- Goodin, Robert E., Bruce Headey, Rund Muffels and Henk-jan Dirven, 2001, *The Real Worlds of Welfare Capitalism*, Cambridge: Cambridge University Press.
- Cochrane, Allan, John Clarke and Sharon Gewirtz (eds.), 2001, *Comparing Welfare States*, 2nd Edition, London: Sage Publications.
- Khakee, A. I. Elander and S. Sunesson (eds.), 1995, *Remaking the Welfare State*, Aldershot: Avebury.
- Gould, Arthur, 1993, *Capitalist Welfare Systems: A Comparison of Japan, Britain & Sweden*, London and New York: Longman.
- Arthur Gould 著，吳明儒、賴兩陽合譯，1997，資本主義福利體系：日本、英國與瑞典之比較，台北：巨流圖書公司印行。
- Kleinman, Mark, 2002, *A European Welfare State? European Union Social Policy in Context*, UK: Palgrave.
- Lowe, Rodney, 1999, *The Welfare State in Britain since 1945*, 2nd edition, London: MacMillan Press Ltd.
- Murray, Charles, 1984, *Losing Ground: American Social Policy—1950 to 1980*, New York: Basic Books.
- Giddens, Anthony (ed.), 2001, *The Global Third Way Debate*, Cambridge: Polity Press.
- Giddens, Anthony, 1998, *The Third Way: The Renewal of Social Democracy*, UK: Polity Press.
- Leibfried, Stephan and Paul Pierson (eds.), 1995, *European Social Policy: Between Fragmentation and Integration*, Washington, D. C.: The Brookings Institution.
- Sykes, Robert, Bruno Palier and Pauline M. Prior, 2001, *Globalization and European Welfare States: Challenges and Change*, UK: Palgrave.

課程要求：

- (1) . Students are expected to **read at least those required articles and books** each week (30%)
- (2) . Students have to turn in one **group paper** based on **in-depth case** or **comparative research** related to the course. (60%)
- (3) . Students are expected to **participate actively** in class discussion. (10%)

* 其他參考資料將隨時補充。