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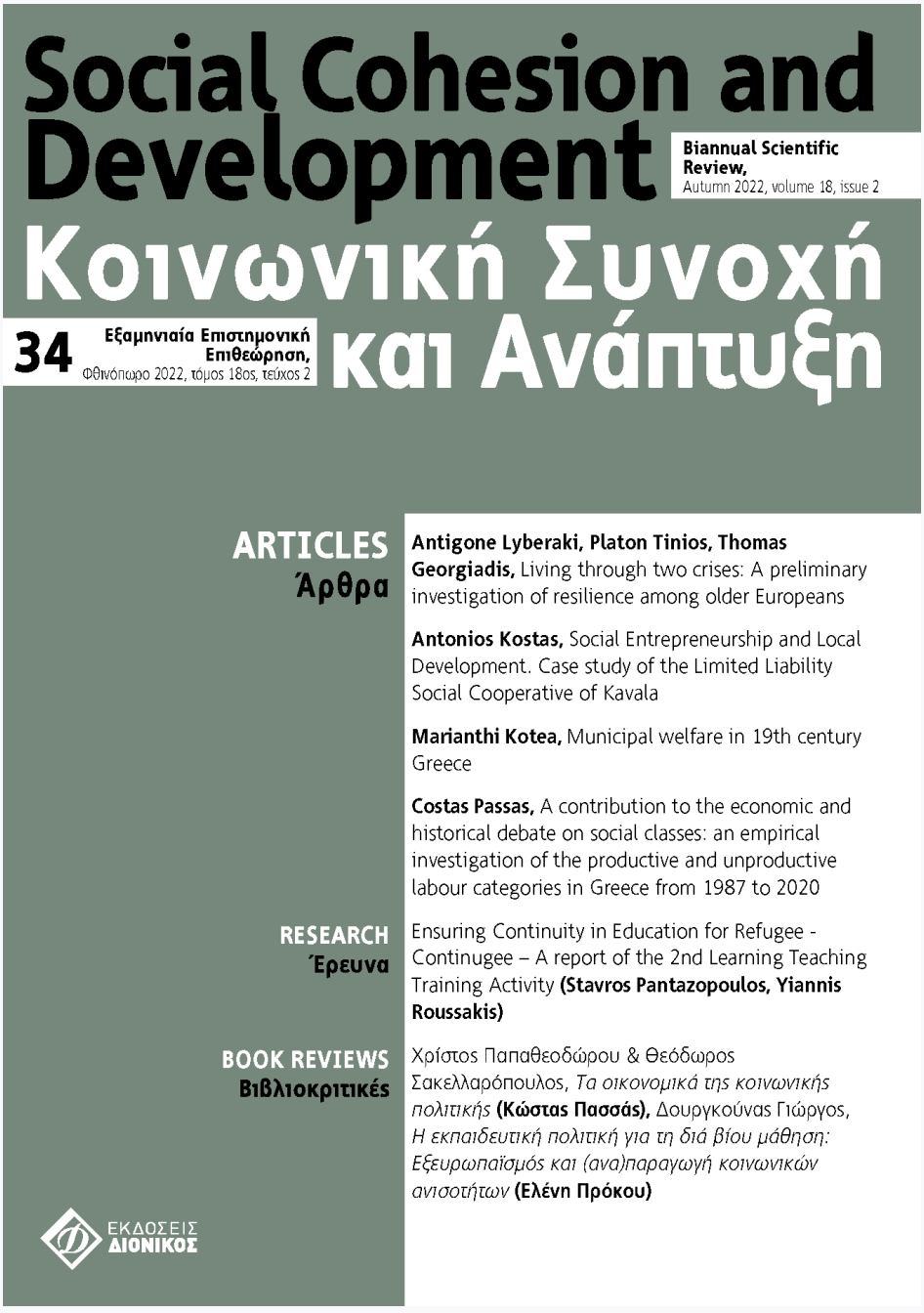

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Social Cohesion and Development

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Κοινωνική Συνοχή και Ανάπτυξη

33 **Εξαμηνιαία Επιστημονική Επιθεώρηση,**
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Chara Vavoura, Ioannis Vavouras, Income inequality and poverty in Greece during the recent economic, fiscal and Covid-19 crises

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ΟΔΗΓΙΕΣ ΠΡΟΣ ΤΟΥΣ ΣΥΓΓΡΑΦΕΙΣ

Τα κείμενα υποβάλλονται στα ελληνικά ή στα αγγλικά. Οι συγγραφείς δεσμεύονται ότι δεν έχουν δημοσιεύσει ή υποβάλει προς κρίση τα άρθρα τους σε άλλο έντυπο. Σε περίπτωση δημοσίευσης παρόμοιου άρθρου, αυτό δηλώνεται από τον συγγραφέα. Υποβάλλονται τέσσερα ταυτόσημα κείμενα και ένα σε ηλεκτρονική μορφή στην επόμενη διεύθυνση του εκδότη.

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Τα άρθρα αξιολογούνται από δύο τουλάχιστον ανώνυμους κριτές. Το όνομα και τα άλλα στοιχεία του συγγραφέα, καθώς και ο τίτλος του άρθρου πρέπει να υποβάλλονται σε ξεχωριστή σελίδα από το κυρίως σώμα (τίτλος, κείμενο, βιβλιογραφικές αναφορές). Τα υποβαλλόμενα άρθρα πρέπει να συνοδεύονται από δύο περιλήψεις, όχι μεγαλύτερες των 100 λέξεων, και πέντε λέξεις-κλειδιά στα ελληνικά και τα αγγλικά. Η έκταση των άρθρων πρέπει να κυμαίνεται μεταξύ 6-8.000 λέξεων, συμπεριλαμβανομένων των περιλήψεων και αναφορών. Τα χειρόγραφα των άρθρων που απορρίπτονται δεν επιστρέφονται.

Για τις αναφορές χρησιμοποιείται το σύστημα Harvard. Οι αναφορές στο κείμενο περιλαμβάνουν το επώνυμο του συγγραφέα και το έτος έκδοσης της δημοσίευσης, π.χ. (Esping-Andersen, 1990, Kleinman and Piachaud, 1993). Οι άμεσες αναφορές πρέπει να δίνουν και τον αριθμό της σελίδας ή των σελίδων, π.χ. Ferrera et al., 2002: 230. Σε περίπτωση περισσότερων αναφορών του ίδιου συγγραφέα για το ίδιο έτος, πρέπει να χρησιμοποιείται η διάκριση με α, β, γ κ.λπ. για το έτος. Οι βιβλιογραφικές αναφορές (όχι βιβλιογραφία) καταχωρούνται αλφαβητικά στο τέλος του κειμένου. Παρακαλούνται οι συγγραφείς να επιμελούνται την ακριβή αντιστοίχηση των αναφορών του κειμένου με τον αλφαβητικό κατάλογο των βιβλιογραφικών αναφορών στο τέλος του κειμένου και το αντίστροφο. Η αναφορά σε βιβλία πρέπει να δίνει το όνομα του συγγραφέα, το έτος έκδοσης, τον τίτλο του βιβλίου, τον τόπο έκδοσης και την επωνυμία του εκδοτικού οίκου. Π.χ. Scharpf F., (1999), *Governing in Europe: Effective and Democratic?* Oxford: Oxford University Press. Η αναφορά άρθρων σε περιοδικά πρέπει να δίνει τόμο, τεύχος, σελίδες, καθώς και τον τίτλο του άρθρου σε απλά εισαγωγικά. Για παράδειγμα: Atkinson A.B., Marlier E. and Nolan B., (2004), "Indicators and Targets for Social Inclusion in the European Union", *Journal of Common Market Studies* 42: 47-75. Αναφορές σε κεφάλαια συλλογικών τόμων καταχωρούνται με τον τίτλο του κεφαλαίου σε απλά εισαγωγικά, ακολουθούμενο από τον συγγραφέα και τον τίτλο του συλλογικού τόμου. Π.χ. Leibfried, S. and Pierson, P. (1995) "Semisovereign Welfare States: Social Policy in a multitiered Europe", in: Leibfried S. and Pierson P., (eds), *European Social Policy: Between Fragmentation and Integration*, p.p. 43-77, Washington D.C.: The Brookings Institution. Οι τίτλοι των βιβλίων και περιοδικών γράφονται με πλάγια γράμματα. Συνιστάται οι επεξηγηματικές σημειώσεις να είναι οι ελάχιστες δυνατές. Εάν κρίνονται απαραίτητες, τότε πρέπει να αριθμούνται στο κείμενο και να παρατίθενται στο τέλος του άρθρου. Επίσης, στο τέλος παρατίθενται και οι τυχόν ευχαριστίες. Άρθρα που δεν συμβιβάζονται με τις παραπάνω οδηγίες επιστρέφονται στον συγγραφέα για την ανάλογη προσαρμογή.

Τα **προς κρίση-παρουσίαση βιβλία** αποστέλλονται στην Μαρίνα Αγγελάκη, στη διεύθυνση του εκδοτικού οίκου.

Η Επιθεώρηση **Κοινωνική Συνοχή και Ανάπτυξη** κυκλοφορεί δύο φορές τον χρόνο, την άνοιξη και το φθινόπωρο.

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Social Cohesion and Development

Κοινωνική Συνοχή και Ανάπτυξη

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Odyssea: A social NGO supporting the employability of vulnerable young people — **89-92**

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Μαρίνα Αγγελάκη
-επιμέλεια-

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Η σημερινή οικονομική κρίση επαναφέρει επιτακτικά προς συζήτηση τα ζητήματα της κοινωνικής πολιτικής και του κοινωνικού κράτους. Ο παρών τόμος, αν και σχεδιάστηκε πρωτίστως ως διδακτικό εγχειρίδιο, αποτελεί μια κριτική και συνολική εισαγωγή στα θέματα αυτά. Πολυεπίπεδες προσεγγίσεις εξετάζουν τις κύριες έννοιες, το περιεχόμενο και την εξέλιξη του σύγχρονου κοινωνικού κράτους. Παρουσιάζονται οι επιμέρους κοινωνικές και δημόσιες πολιτικές, όπως η απασχόληση και οι εργασιακές σχέσεις, η κοινωνική ασφάλιση, η υγεία, η κοινωνική πρόνοια και ο κοινωνικός αποκλεισμός, οι πολιτικές για τους μετανάστες και τους πρόσφυγες, η εκπαιδευτική πολιτική. Κοινωνικοί κίνδυνοι, κοινωνική προστασία, κοινωνική αλληλεγγύη, κοινωνικά προβλήματα, κοινωνική συνοχή είναι οι άξονες γύρω από τους οποίους δομούνται αυτές οι πολιτικές. Οι οριζόντιου χαρακτήρα κοινωνικές πολιτικές επικεντρώνονται στο φύλο, στην τοπική αυτοδιοίκηση, σε υπερεθνικό και ευρωπαϊκό πεδίο, στην κοινωνική οικονομία και στην επιχειρηματικότητα. Τέλος, αναλύεται ο ρόλος των βασικών πυλώνων και εργαλείων άσκησης και εφαρμογής κοινωνικών πολιτικών, όπως αυτός της κυβέρνησης, των συνδικάτων, της κοινωνίας πολιτών και των επιχειρήσεων. Τα κεφάλαια του τόμου, γραμμένα απλά και κατανοητά από έμπειρους πανεπιστημιακούς και ειδικευμένους στο αντικείμενο ερευνητές, προσφέρουν μια συνολική και περιεκτική εικόνα των αντίστοιχων πολιτικών, της εξέλιξης και της εφαρμογής τους.

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Income inequality and poverty in Greece during the recent economic, fiscal and Covid-19 crises

Chara Vavoura, *National and Kapodistrian University of Athens*
Ioannis Vavouras, *Panteion University*

Εισοδηματικές ανισότητες και φτώχεια στην Ελλάδα κατά τη διάρκεια της πρόσφατης οικονομικής, δημοσιονομικής και επιδημιολογικής (Covid-19) κρίσης

Χαρά Βαβούρα, *Εθνικό και Καποδιστριακό Πανεπιστήμιο Αθηνών*
Ιωάννης Βαβούρας, *Πάντειο Πανεπιστήμιο*

ABSTRACT

The issues of income distribution and poverty are among the most important socio-economic problems and the approach to their solution reveals to some extent a country's level of economic and social development. Greece's performance on these topics is still bellow the corresponding averages of the Eurozone, although in recent decades there has been a tendency to converge, albeit with fluctuations. The main purpose of this paper is to investigate whether the economic and fiscal crisis of the period 2010-2016 and the Covid-19 pandemic have affected the distribution of income and the level of poverty in Greece.

KEY WORDS: Income Inequality, Poverty, Social Exclusion, Economic Crisis, Coronavirus Pandemic.

ΠΕΡΙΛΗΨΗ

Τα ζητήματα της διανομής του εισοδήματος και της φτώχειας είναι από τα περισσότερο σημαντικά κοινωνικοοικονομικά προβλήματα και η αντιμετώπισή τους αποκαλύπτει ως ένα βαθμό το επίπεδο της οικονομικής και κοινωνικής ανάπτυξης των χωρών. Οι επιδόσεις της Ελλάδας στα θέματα αυτά εξακολουθούν να είναι χαμηλότερες από τα μέσα επίπεδα της Ευρωζώνης, μολονότι κατά τις τελευταίες δεκαετίες παρουσιαζόταν κάποια τάση σύγκλισης προς αυτά. Σκοπός της παρούσας εργασίας είναι να διερευνήσει εάν η οικονομική και δημοσιονομική κρίση της περιόδου 2010-2016 και η πανδημία του Covid-19 επηρέασαν τη διανομή του εισοδήματος και το επίπεδο της φτώχειας στην Ελλάδα.

ΛΕΞΕΙΣ-ΚΛΕΙΔΙΑ: Εισοδηματική Ανισότητα, Φτώχεια, Κοινωνικός Αποκλεισμός, Οικονομική Κρίση, Πανδημία του Κορονοϊού.

1. Introduction

After 2007 Greece faced a large economic crisis that evolved to fiscal crisis. During the period 2007-2013, Greece's total real GDP shrunk by 26.6% and the unemployment rate jumped from 8.4% to 27.5%. The question that arises is whether the specific economic and fiscal crisis as well as the economic consequences of the Covid-19 pandemic affected the distribution of

income in Greece and to what extent. This is the main issue that this paper seeks to explore. However, it should be noted from the beginning that the limitations regarding the existing data and mainly the small number of observations (yearly data) referring to the two crises, the second of which has not yet completed its effects at the time of writing this paper, do not allow for any rigorous empirical analysis on the effects of these crises on income distribution and poverty[1].

Income inequality is a multidimensional phenomenon which has critical economic, social and political implications. It mainly reflects the directions and the effectiveness of the social welfare system and the extent of the distributive role of the state. Generally, it also reveals the level of socioeconomic development of the country. However, apart from being a crucial economic policy objective, it is also of increased theoretical concern. According to economists such as Adam Smith, David Ricardo, John Stuart Mill and Karl Marx, the distribution of income and more specifically the specification of the rules regulating this distribution is the most important issue in economics.

A key concern that has preoccupied both relevant economic theory and empirical research is the relationship between income distribution and economic growth[2]. We must stress however that income inequality might affect growth through many channels so that the end result or the final effect might be positive or negative, depending on many factors and primarily on the existing and past market conditions and the progressivity or the extent of the re-distributive state measures, if any. Moreover, this relationship is not static but evolves with time and with the level of economic development of countries (Bubbico and Freytag, 2018)[3]. Empirical research referring to EU member states concludes that income inequality is positively related to economic growth in the case of developed EU countries, while in the case of developing ones it is negatively related to growth and in fact detrimental to economic growth (Jianu et al., 2021)[4].

It is known that the income of each individual, within the context of the market mechanism, is equal to the product of the quantities of the production factors it rents/sells within the production process and the price of each factor, which is determined in the corresponding market. This distribution of income, which depends on the distribution of personal abilities and wealth among individuals, may not be considered socially fair for various reasons, namely:

1. For *ethical reasons*. It may be considered morally unfair to have people in a society who are too rich or too poor.
2. Because of the *social costs of poverty*. If the income of working employees is too low, it will have a negative impact on their health, education and specialization, and therefore on their productivity, with negative effects and on the financial well-being of entrepreneurs. In addition, it is possible to create problems of social exclusion and in general loss of social cohesion that may lead to social unrest.
3. For *economic reasons*. The marginal utility of an income unit for the rich can be argued to be much lower than for the poor. Thus, a transfer of some income from rich to poor people is associated with a net positive impact on overall social well-being or welfare, as the increasing the well-being of the poor is considered by society as a whole to offset the decline in the well-being of the rich.

We must stress that the content of the socially equitable distribution of income is to a large extent a moral issue. It is largely based on value judgments and varies by country and reference period. Therefore, a generally accepted definition of the concept of socially equitable distribution of income cannot be provided.

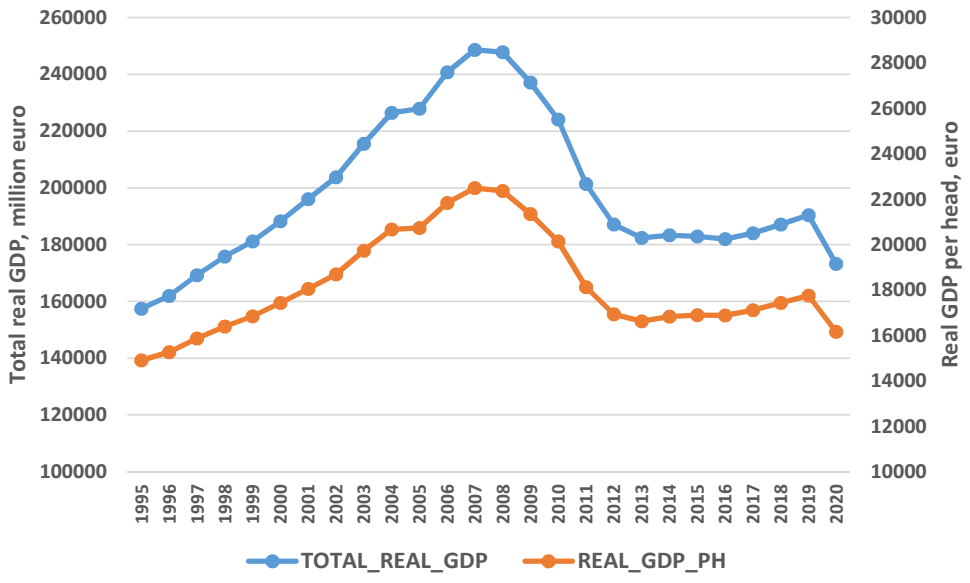
Assessing the degree of income inequality (both the extent of the relative income inequality and the number of people living in absolute poverty, whatever they may be) is the first in a series of steps to address the problem of poverty in a society. Perhaps the most difficult issue associated with the distribution of income is the definition of "socially equitable" distribution, so that it becomes a quantitatively defined objective of economic policy, that government, applying various means of tax policy (such as progressive taxation combined with negative income taxes), income policy (such as the introduction of minimum wages and salaries), as well as public spending policy instruments (such as current transfers to households, spending on improving education and rent subsidies) to contribute to the advancement of this objective.

It should be noted here that the concept of "socially equitable" income distribution is difficult to define even theoretically without resorting to value judgments. This difficulty is also reflected in the choice of principles (or criteria) on the basis of which income should be distributed. Thus, unlike other economic policy problems (inflation, unemployment, government deficits, balance of payments deficits, low economic growth, etc.), for which governments often specify their objectives, the issue of income distribution is generally limited in some vague declarations, which do not constitute political commitments. It is no coincidence, then, that the redistributive role of the state is rather limited in most countries.

2. Income inequality

It is obvious that during periods of economic recessions or even economic slowdowns total real income as well as per capita real income are reduced. This is an expected outcome. As we can see from Chart 1, during the period 2007-2013 total real GDP in Greece was reduced from 248.6 bn euro to 182.4 bn euro. A reduction amounting to 26.6%. Equally, read GDP per head during the same period was reduced from 22,500 euro to 16,630 euro. A reduction amounting to 26.1%. Moreover, during the coronavirus pandemic and namely during the period 2019-2020, total real GDP in Greece was reduced from 190.5 bn euro to 173.3 bn euro. A reduction amounting to 9%. Equally, real GDP per head during the same period was reduced from 17,760 euro to 16,170 euro. A reduction amounting also to 9%.

Chart 1
Total real GDP and real GDP per head in Greece during the period 1995-2020



Source: Eurostat, Data codes: NAMA_10_GDP and NAMA_10_PC.
Note: TOTAL_REAL_GDP = Total real GDP =Total Gross Domestic Product at market prices in chain linked volumes (2010) in million euro (measured in primary vertical axis). REAL_GDP_PH = Real GDP per head = Gross Domestic Product at market prices in chain linked volumes (2010) in euro per capita (measured in secondary vertical axis).

However, the issue under investigation in this paper is whether the reduction or decline of total or per capita real income (GDP) during the recent Greek economic slowdowns is associated with any distributional impacts or it has affected in a balanced way the whole spectrum of the Greek society. To put it more explicitly, whether the recent economic slowdowns had symmetrical or asymmetric effects on income distribution and what specific patterns they followed.

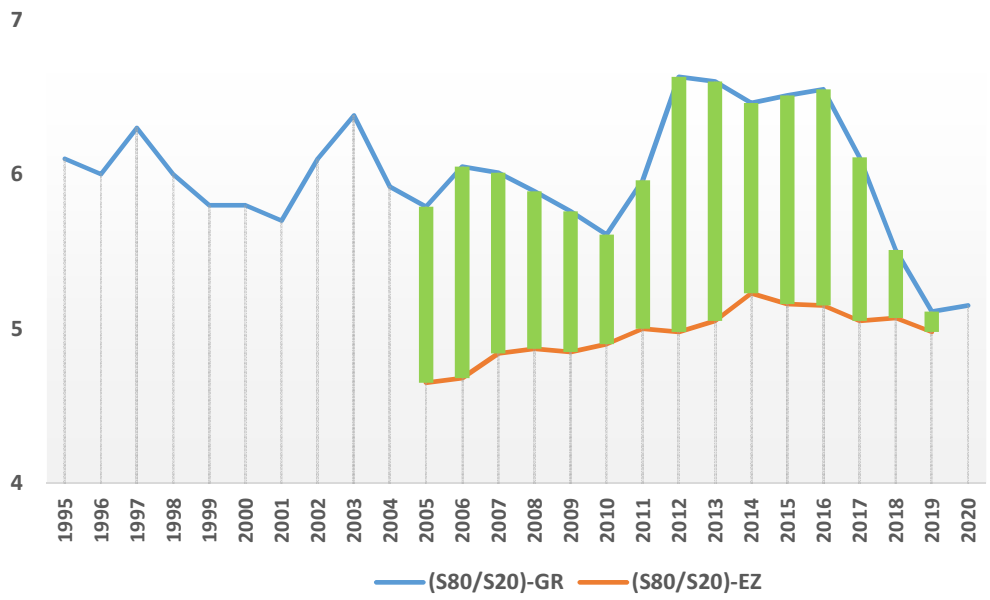
When considering the issue of income distribution, what matters is personal income distribution. Personal income distribution refers to the way income is distributed among members of society, regardless of its origin. That is, it refers to the discrepancies between higher and lower incomes in society. The criteria for measuring inequality in income distribution are divided into two broad categories, that is those based on "relative" income and those based on "absolute" income. Criteria based on "relative" income compare the income of one person or group of people with the income of another person or another group of people. These criteria are useful in investigating the distribution of income inequalities. These include, the "percentage distributions" and the "Gini coefficient".

In percentage distributions a certain percentage of individuals is compared to other or others. For example, the average per capita net income of the lowest 20% is compared to the average net per capita income of the highest 20%. From this analysis, useful conclusions can be drawn regarding the distinction of the population of a country into five equal groups (quintiles): the lowest 20%, the second 20%, the middle 20%, the fourth 20% and the top 20%. Moreover, corresponding international comparisons can be made.

It is obvious that if net incomes were distributed exactly equally among the individuals, then each quintile of the population would receive 1/5 or 20% of the total net income and therefore there would be no discrepancies in the net average income between the five quintiles. But this is not really the case. It is thus found that the average net per capita income of the top 20% is many times higher than that of the bottom 20%.

Particularly useful in investigating income distribution are the data in Chart 2, which shows the evolution of the value of the income distribution in quintiles (S80/S20). Namely it depicts the income quantile share ratio for disposable income in Greece and the Eurozone during the period 1995-2020. The income quantile share ratio refers to the share of the disposable income of the "richest" 20% of the population to the corresponding income of the "poorest" 20% of the population. The index therefore compares the share of income of the richest 20% of the population with the corresponding share of the poorest 20%.

Chart 2
The income quantile share ratio (S80/S20) for disposable income for Greece (GR) and the Eurozone (EZ) during the period 1995-2020



Source: Eurostat, EU-SILC survey, data code: ILC_DI11, update 02/10/2021 (for the period 2003-2020. For the period 2000-2002, ELSTAT. For the period 1995-1999, former Eurostat estimates.
Note: S80/S20 = the ratio of total income received by the 20% of the population with the highest income (top quintile) to that received by the 20% of the population with the lowest income (lowest quintile). Income is the equivalized disposable income.

We must note that income in Chart 2 is the "equivalized disposable income". More specifically, for the estimation of the total equivalized disposable income of households, their total net income is taken into account, i.e., the income that comes after the deduction of taxes and social security contributions, which is received by all members of the household. This includes income from work, income from property, social benefits and pensions, remittances from other households, as well as imputed income from the use of the business car. That is, the total net income from all sources of income is included, after deducting any benefits to other households. Equivalized disposable income is defined as the total disposable income of the household after its division by the equivalent household size (weighting 1 for the first adult, 0.5 for the second adult and members aged 14 and over and 0.3 for children).

Based on this definition, each member of the specific household is considered to have the same income that corresponds to the equivalized disposable income, which means that each member of the household is supposed to enjoy the same standard of living. Consequently, the

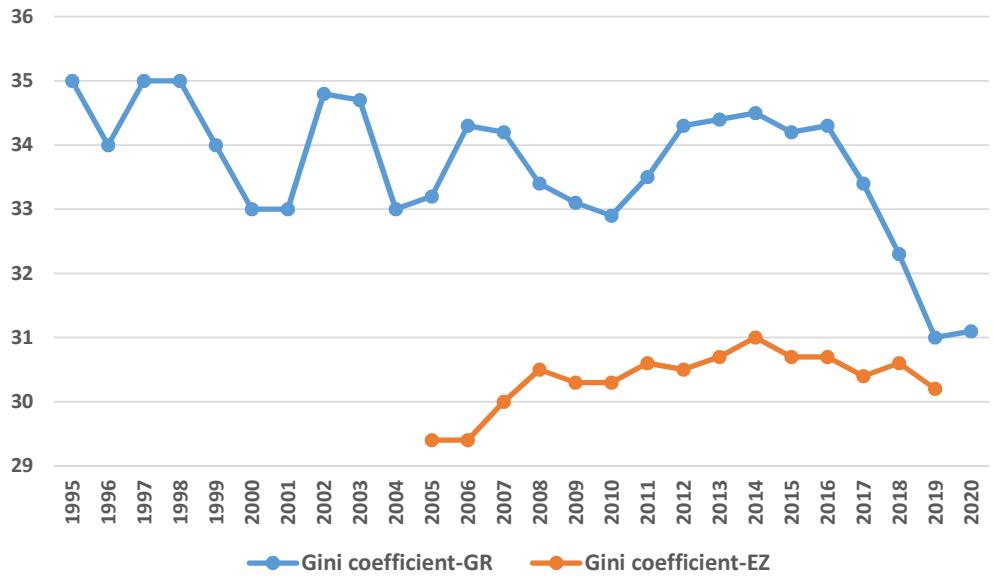
income thus attributed to each member of the household represents a standard of living and not a monetary gain. We must note however, that the income quintile share ratio (S80/S20) is affected by the extreme values of the quintile income distribution of the population. Together with the unequal income distribution index (Gini coefficient) they are the most important indicators of economic inequality.

As shown in Chart 2, in Greece the share of income of the richest 20% of the population relative to that of the poorest 20% is higher than the Eurozone average, although in the post 2016 period it shows a remarkable tendency to converge with it. Based on this indicator, we find that in Greece the income inequality in terms of income quantile shares is permanently higher than the corresponding average of the Eurozone. The second point made is that in the early years of the two recent crises economic and Covid-19 pandemic (mainly during 2010-2012 and 2020) income inequalities initially increased and then stabilized but at high levels (2013-2016). Between 2010 and 2012 the ratio S80/S20 increased from 5.61 to 6.63, while between 2019 and 2020 increased slightly from 5.11 to 5.15[5]. By considering Chart 2 we conclude that during the period 2010-2016 the value of the ratio S80/S20 in Greece increased from 5.61 to 6.55, that is by 17% approximately. That is, during the period of economic and fiscal crisis of the country the disparities between the richest 20% and the poorest 20% of the population increased significantly. This finding reinforces the hypothesis that economic and financial crises also function as mechanisms for income (and wealth) redistribution. We also observe from Chart 2 that during the period 2005-2015 the value of the ratio S80/S20 in the Eurozone increased from 4.65 to 5.16. That is during this period inequality increased in the Eurozone.

Additional information regarding the deterioration of income distribution is given by the evolution of the index of participation of the top 1% of the population in total income. According to the estimates provided by the World Inequality Database (WID) of the World Bank (https://wid.world), the top 1% share of population in pre-tax national income in Greece during the period 2011-2014 increased significantly from 7.3% to 12.5%, while during the period 2019-2020 it increased slightly from 10.7% to 10.8%.

The index most often used to express or measure the extent of inequalities in income distribution across a population is the "Gini index" or "Gini coefficient" developed by the Italian statistician Corrado Gini in 1912. The value of the Gini coefficient is between 0 and 1, where 0 means absolute equality (or zero inequality) in terms of income distribution and 1 means absolute inequality (if all national income was concentrated in one household or one individual). If the Gini coefficient is expressed as a percentage (so it is multiplied by 100), then it takes values ranging from 0 (absolute equality in income distribution) to 100 (absolute inequality in income distribution). This is usually the form in which it is used. As the income distribution ratio in pentagrams (S80 / S20) is affected, as already noted, by the extreme values of income distribution, the Gini coefficient is a more satisfactory measure of income inequality, since it is not affected by the extreme values of income distribution.

Chart 3
The Gini coefficient of equivalised disposable income for Greece (GR) and the Eurozone (EZ) during the period 1995-2020



Source: Eurostat, EU-SILC survey, data code: ILC_DI12, update 02/10/2021. For the year 2002, ELSTAT.

The evolution of the Gini coefficient of equivalized disposable income for Greece during the period 1995-2020 and for the Eurozone during the period 2005-2020 is presented in Chart 3. As it has been already clarified the equivalized disposable income is used in order to take into account differences in the size and composition of households. Based on this indicator, we find that in Greece income inequality, as measured by the Gini coefficient, is consistently higher than the corresponding average of the Eurozone, although in the post 2016 period it shows a remarkable tendency to converge with it, as it happened with the indicator S80/S20. That is income inequality in Greece is higher than the Eurozone average. The second point made is that in the early years of the two recent crises economic and Covid-19 pandemic (2010-2014 and 2020) income inequalities initially increased and then stabilized but at high levels (2014-2016). Between 2010 and 2014 the value of the Gini coefficient increased from 32.9 to 34.5, while between 2019 and 2020 it increased slightly from 31.0 to 31.1[6]. We conclude therefore that during the period 2010-2016 the value of the Gini coefficient in Greece increased from 32.9 to 34.3, that is by 4.3%. That is, during the period of economic and fiscal crisis of the country income inequalities as measured by the Gini coefficient had increased. Therefore, and in terms of the Gini coefficient, we conclude that economic and financial crises function as mechanisms for income redistribution. A fact that reinforces our previous findings in terms of the income quantile share ratio index.

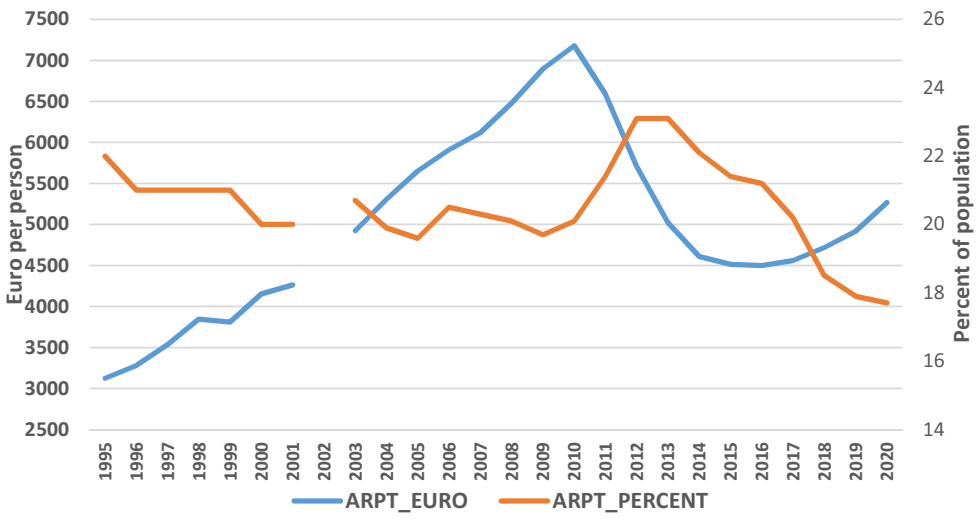
Comparing the values of the two income inequality indicators for Greece, that is the income quantile share ratio S80/S20 and the Gini coefficient, we come to the conclusion that the inequalities were greater in terms of the S80/S20. That is, during the recent economic and fiscal crisis in Greece, the gap between the richest 20% of the population relative to the poorest 20% widened much more than the average inequality as measured by the Gini coefficient.

3. Poverty

Exploring the extent of poverty in a society is an important issue. Poverty generally refers to the situation in which individuals or households lack sufficient resources or capabilities to be able to meet their needs. Historically, poverty has been linked to income, which even today is at the core of the concept. Poverty can have: First, an absolute content: The poor are deprived of basic means of subsistence, which usually include housing, food, clothing and health and education services. Absolute poverty implies that there are some minimum socially tolerable living standards below which it is not acceptable to live as a member society, since the limits of human dignity are violated. Second, a relative content: Poor compared to other members of society. In this case, those who lack a socially acceptable level of income or resources compared to other members of society are considered as poor. Relative poverty is therefore not determined on the basis of some objective criteria, such as absolute poverty, but by the existing social context. This context is characterized by intertemporal changes and transnational divergencies. Relative poverty is essentially an indicator of income inequality rather than poverty, as it depends on the overall distribution of income in the particular society or country and refers to individuals or households whose income is much lower than average or median income. Relative poverty implies that as the level of economic development increases, so do the socially acceptable living standards, in the sense that it may not be "socially tolerable" to have individuals or households with significantly lower incomes.

Eurostat assesses only relative poverty. In particular, it estimates "at-risk-of-poverty thresholds" and the "at-risk-of-poverty rates" for European Union countries. The first indicator is measured in euro while the second as percent of population. The at risk of poverty cut-off point usually used is the 60% of median equivalized income after social transfers. Chart 4 shows the evolution of the above "at-risk-of-poverty threshold" in euro for a single person and the "at-risk-of-poverty rate" as percentage of population for Greece during the period 1995-2020. Considering the "at-risk-of-poverty threshold" during the period of economic crisis 2010-2016, as it was expected, it decreased significantly from 7178 to 4500 euro. That is, it had been reduced by 37.3%. Considering the "at-risk-of-poverty rate" we see that during the period 2010-2012 it increased remarkably from 20.1 to 23.1 % of population, and then started to fall. Till 2016 it had been reduced to 21.2%, still higher than the 2009 corresponding rate (19.7%) by 1.5 percentage units. However, during the Covid-19 pandemic (2019-2020), on the one hand the "at-risk-of-poverty threshold" actually increased (from 4917 to 5266 euro) and on the other hand the "at-risk-of-poverty rate" was actually slightly increased (from 17.9% to 17.7%)[7]. It seems therefore that the Covid-19 pandemic, not only did not worsen the extent of poverty in Greece, as it is measured by the above indicators, but on the contrary, it improved it.

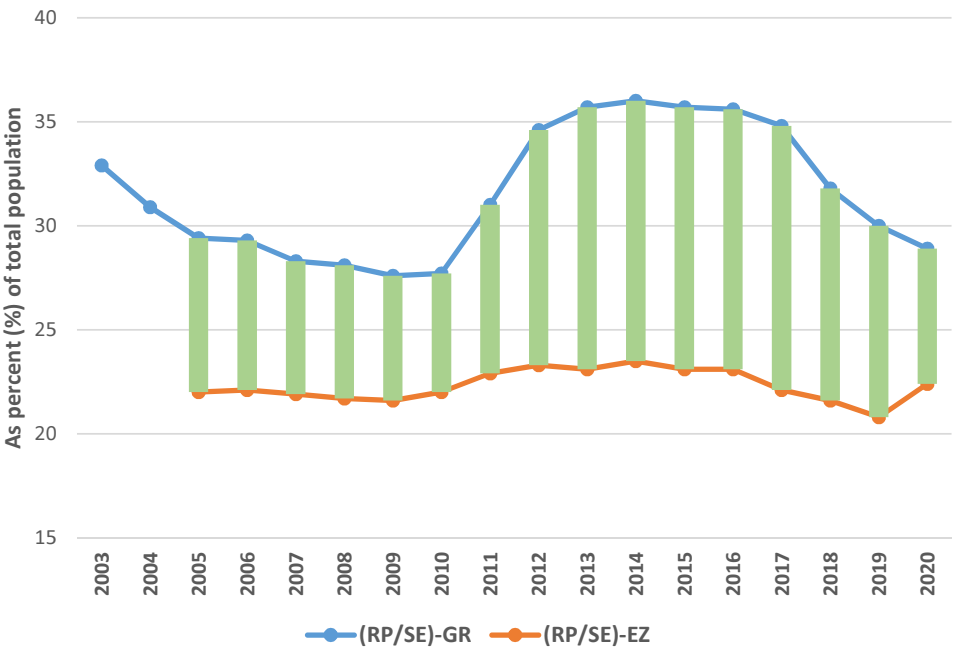
Chart 4
At-risk-of-poverty threshold and at-risk-of-poverty rate for Greece during the period 1995-2020 in euro



Source: Eurostat, EU-SILC and ECHP surveys, data code: ILC_LI01, update: 28/10/2021.
Note: ARPT_EURO = At-risk-of-poverty threshold in euro for a single person (measured in primary vertical axis). ARPT_PERCENT = At-risk-of-poverty rate in percent of population (measured in secondary vertical axis).

More information on the extent of poverty is provided by the indicator "people at risk of poverty or social exclusion", which shows the percentage of the population at risk of poverty or social exclusion. We must note that this indicator is the main indicator to monitor the EU 2030 target on poverty and social exclusion and was the headline indicator to monitor the EU 2020 Strategy poverty target[8]. The indicator corresponds to the sum of persons in each country that: a) Are at risk of poverty (people with an equivalized disposable income after social transfers that is below the risk-of-poverty threshold of 60% of the national median equivalized disposable income). b) Are severely materially deprived (they experience at least 4 out of 9 following deprivations: cannot afford 1) to pay rent or utility bills, 2) keep home adequately warm, 3) face unexpected expenses, 4) eat meat, fish or a protein equivalent every second day, 5) a week holiday away from home, 6) a car, 7) a washing machine, 8) a color television, 9) a telephone. c) They live in households with very low work intensity (people aged 0-59 years living in households where the adults, aged 18-59, work 20% or less of their total work potential during the past year)[9].

Chart 5
People at risk of poverty or social exclusion (RP/SE) as percent (%) of population in Greece (GR) and the Eurozone (EZ) during the period 2003-2020



Source: Eurostat, EU-SILC survey, data code: ILC_PEPS01, update 28/10/2021.
Note: The indicator RP/SE corresponds to the sum of persons who are at risk of poverty or severely materially deprived or living in households with very low work intensity expressed as percent (%) of total population.

Chart 5 shows the people at risk of poverty or social exclusion as percent of population in Greece and the Eurozone during the period 2003-2020. We realize that in Greece during the period of economic and fiscal crisis 2010-2016 the percentage of people at risk of poverty or social exclusion increased from 27.7% to 35.6%. That is, it increased significantly by 7.9 percentage units. This ratio corresponds to approximately 758 thousand people (3,789 thousand in 2016 compared to 3,031 thousand in 2010) (ELSTAT, 2021). That is, the population of the country at risk of poverty or social exclusion increased during the period of economic and fiscal crisis (2010-2016) by about this large number. On the contrary, we see that during the Covid-19 pandemic (2019-2020) the percentage of people at risk of poverty or social exclusion in Greece was actually reduced from 30% to 28.9%, at least during the first year of the pandemic. This ratio corresponds to 118 thousand (3,044 thousand in 2020 compared to 3,162 thousand in 2019). That is, the population of the country at risk of poverty or social exclusion actually decreased in between 2019 and 2020 by about this num-

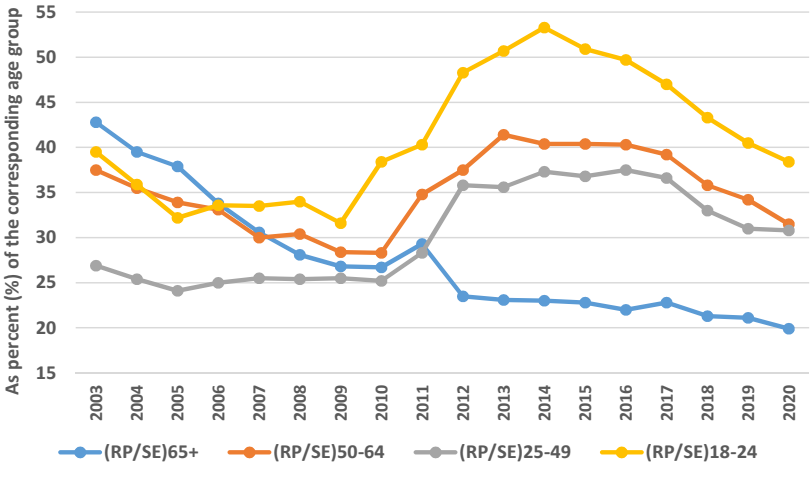
ber. However, we must take into account the fact that the income reporting period in EU Statistics on Income and Living Conditions (EU-SILC surveys) refers to the previous year of the survey[10], and therefore the year 2020 does not adequately incorporate the effects of the coronavirus pandemic.

Moreover, we realize from Chart 5 that the percentage of people at risk of poverty or social exclusion in Greece is consistently much higher than the corresponding average of the Eurozone. This should be of particular concern to the country's economic policy makers.

A major consequence of the economic and fiscal crisis was that it affected asymmetrically the risk of poverty or social exclusion (RP/SE) rates of the various age groups, as we can see from Chart 6. Actually, the people over the age of 65 years improved their relative position on average, since their corresponding RP/SE rates declined during the period 2010-2016 from 26.7% to 22%. This improvement continued and between the years 2019 and 2020 (from 21.1% to 19.9%). All the other age groups worsened significantly their relative positions during the period 2010-2016 (the age group 50-64 from 28.3% to 40.3%, the age group 25-49 from 25.2% to 37.5% and the age group 18-49 from 38.4% to 49.7%). It is noteworthy that in the age group of 18-24 years the share of people at RP/SE in 2014 reached the 53.3%. As we see from Chart 6, more than 50% of the young people in Greece were at risk of poverty or social exclusion during the period 2013-2015.

From Chart 6 we derive the conclusion that, although the incomes of those over 65, who are mainly retired, decreased significantly during the years of economic and fiscal crisis, these reductions were proportionally lower than those of the other age groups that had been more severely affected by rising unemployment and wage and income cuts. This improvement of the relative position of pensioners helped curb an even greater increase in aggregate poverty (Andriopoulou, Karakitsios and Tsakloglou, 2017).

Chart 6
People at risk of poverty or social exclusion (RP/SE) as percent of major age groups in Greece during the period 2003-2020



Source: Eurostat, EU-SILC survey, data code: ILC_PEPS01, update 28/10/2021.
Notes: (RP/SE) = People at risk of poverty or social exclusion. 65+ = age 65+, 50-64 = age 50-64, 25-49 = age 25-49 and 18-24 = age 18-24.

4. Comments and conclusions

It has been established by empirical research that the redistributive role of the Greek state is considered as limited in comparison to other EU countries, while relative poverty in Greece is consistently found to be higher than the EU average (Andriopoulou, Karakitsios and Tsakloglou, 2017). Comparing the evolution of income inequality and poverty indicators for Greece during the periods of economic and fiscal crisis on the one hand and the Covid-19 pandemic on the other, we conclude that during the period of economic and fiscal crisis income inequality and poverty increased significantly in Greece, while during the Covid-19 crisis income inequalities slightly increased but poverty was slightly improved. This outcome motivates us to further investigate the causes of these discrepancies between the two crises in terms of their redistributive effects.

The issue therefore is, how did one crisis differ from the other in the case of Greece regarding the strategies adopted to address them? In the case of economic and fiscal crisis, the European Institutions, considering that the Greek economic problem was non-symmetric, i.e., did not concern all EU countries but was limited to Greece only, insisted on the strict application of the fiscal rules of the Stability and Growth Pact (SGP), imposing austerity programs ("memorandums of understanding" associated with "austerity packages"[11]) on the country in order to reduce its budget deficits. The economic policy adopted had a rather "punitive" orientation and from the outcome of the above analysis it seems that it had affected more severely people living on lower incomes, since although the value of the Gini coefficient during the period 2010-2016 had increased by 4.3% (inequality increased), the disposable income quantile share ratio (S80/S20) during the same period had increased by 17% (the gap between the richest 20% and the lowest 20% widened disproportionately). Moreover, the policy adopted affected more the incomes of younger people than those of the retirees.

In the case the Covid-19 pandemic, the European Institutions, considering that the economic impact of the measures adopted by national governments to address the pandemic was symmetrical, i.e., it concerned the whole EU although the extent of economic implications of Covid-19 varied from country to country, the SGP was suspended by the same Institutions, with the activation of the "general escape clause" (GEC) of the SGP in March 2020 (European Commission, 2020a). The outcome of the activation of GEC was the temporary freezing the fiscal adjustment process in the EU countries. The GEC allowed member states to take budgetary measures bypassing the SGP conditions of fiscal consolidation in order to deal with the economic and social consequences of the coronavirus pandemic[12]. We must note that historically, the economic interventions to limit the effects of the coronavirus pandemic were of an unprecedented scale.

Moreover, at the EU level the Recovery and Resilience Facility or, as it is usually called, the Recovery and Resilience Fund (RRF) had been established to support countries and sectors of the economy that been hit hardest, by providing loans and grants for the first years of the recovery period. RRF is the key recovery instrument at the heart of the more general "Next Generation EU Recovery Plan" (Next Generation EU) that aims to address the damage caused by the coronavirus pandemic. The Next Generation EU is expected to help the EU to emerge stronger and more resilient from the pandemic (European Commission, 2020b)[13].

In other words, the deviations concerning the distributional impacts of the two strategies adopted focus on the differences of the policy mix applied in the two cases. Very briefly, in the case of the Greek economic and fiscal crisis a restrictive fiscal policy was applied, while in

the case of the coronavirus pandemic an expansionary fiscal policy was pursued. Based on this finding, we could argue that the coronavirus pandemic created a tendency to restore the interventionist economic role of the state, and especially its protective function, by shifting back the balance from the market to the state (Bergsen, 2020) or at least by bolstering public authority over private agency (DeWit et al., 2020).

The choice of the economic policy mix to address economic problems or economic fluctuations is therefore not without distributional implications. This conclusion must be borne in mind by both the governments of the EU member states and in particular of the Eurozone as well as by European Institutions (ECB, European Commission, etc.) when formulating or proposing economic stabilization policies in the future. They must also be taken into account in the process of reforming the current EU fiscal framework that has begun recently (European Commission, 2021).

Notes

1. It should be noted that several studies have been published investigating the issues of income inequality and poverty in Greece, such as Andriopoulou, Karakitsios and Tsakloglou (2017), Kaplanoglou and Rapanos (2016), Matsaganis and Leventi (2014), Mitrakos (2014), Koutsampelas and Tsakloglou (2013), Mitrakos and Tsakloglou (2012), Tsakloglou and Mitrakos (2006), Tsakloglou and Panopoulou (1998), Papatheodorou (1998), Tsakloglou (1993) and Tsakloglou (1990).
2. See among others Jianu et al. (2021), Mdingi and Ho (2021), Aiyar and Ebeke (2020), Petersen and Schoof (2015), Shin (2012), Voitchovsky (2005), Robinson (1976), Okun (1975) and Kuznets (1955).
3. Some research studies conclude that income inequality exerts positive influence on aggregate economic activity and growth while some others find a negative impact of inequality on economic activity and growth. For an analysis of the issue and an overview of some of the most relevant studies, see, among others, in Bubbico and Freytag (2018).
4. In the study of Jianu et al. (2021), Greece is included in the developing EU member states.
5. It should be noted that the income reporting period refers to the previous year of the survey. So, in terms of 2020 it does not fully incorporate the effects of the coronavirus pandemic.
6. As we have already clarified, the income reporting period refers to the previous year of the survey. So, in terms of 2020 it does not fully incorporate the effects of the coronavirus pandemic.
7. We must note that in Greece the "at-risk-of-poverty rate" is in principle higher in female population (17.8% in 2020 compared to 17.5% for male population) and for young population (in 2020 it was estimated as follows: 20.9% for the age group 0-17 years, 18.4% for the age group 18-64 years and 13.0% for the age group 65+). See Hellenic Statistical Authority (2021).
8. See Eurostat, Income and living conditions (ilc), Reference Metadata in Euro SDMX Metadata Structure (ESMS).
9. Eurostat, Data Browser, People at risk of poverty or social exclusion, data code: T2020_50, update: 28/10/2021, Explanatory texts.

10. The income reference period is the calendar year preceding the survey.
11. Austerity packages included measures such as wage and bonus cuts, minimum wage cuts, pension cuts, social benefits cuts, increases of direct and indirect taxes as well as excise duties, etc.
12. The GEC was first established in 2011 but it was activated in 2020. According to the GEC, in times of severe economic downturn in the Euro area or in the Union as a whole, member states are allowed to temporarily deviate from the adjustment path to meet the medium-term budgetary objective (European Commission, 2020a).
13. For an analysis, see Vavoura and Vavouras (2021).

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ΝΕΕΣ ΚΥΚΛΟΦΟΡΙΕΣ
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ΕΚΔΟΣΕΙΣ
ΔΙΟΝΙΚΟΣ

Ανδρέας Φερώνας

Κοινωνικός αποκλεισμός και κοινωνική αλληλεγγύη στην Ελλάδα της κρίσης

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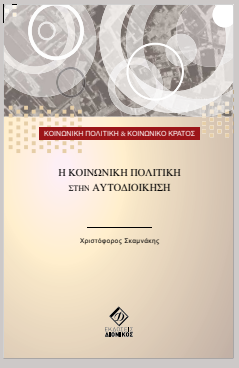

Χριστόφορος Σκαμνάκης

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Η κοινωνική πολιτική των αυτοδιοικητικών φορέων (Περιφέρειες, Δήμοι) αποτελεί ένα νέο, ραγδαία αναπτυσσόμενο και δυναμικό πεδίο της ευρύτερης κοινωνικής πολιτικής και του κοινωνικού κράτους στην Ευρώπη και την Ελλάδα. Έχει τα πλεονεκτήματα της λεπτομερούς γνώσης των τοπικών κοινωνικών προβλημάτων και της άμεσης παρέμβασης για την επίλυση τους. Το βιβλίο σχεδιάστηκε ως χρήσιμο βοήθημα για τους προπτυχιακούς και μεταπτυχιακούς φοιτητές της κοινωνικής πολιτικής, τους μελετητές του πεδίου, αλλά και όσους απασχολούνται επαγγελματικά με την τοπική και περιφερειακή αυτοδιοίκηση.

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Green growth's false premises and alternative policy proposals

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Οι εσφαλμένες βάσεις της πράσινης ανάπτυξης και εναλλακτικές πολιτικές προτάσεις

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ABSTRACT

Green growth recognizes the pressing environmental problems that are threatening the planet, but holds an optimistic view on the relation between economic growth and environmental protection. It presumes that the economy can continue to grow as long as it is geared toward finding new investment opportunities in innovations and technological developments that will lead to the greening of the economy. This will supposedly lead to a gradual decoupling of economic growth from resource use and environmental impact. Scientific evidence seriously questions the decoupling hypothesis, and theories critical of growth have suggested alternative policy proposals for environmental and social sustainability. These non-mainstream theories and analytical frameworks seem to be earning a wider acceptance nowadays.

KEY WORDS: Degrowth policies, green growth, decoupling, sustainability, OECD, European Green Deal

ΠΕΡΙΛΗΨΗ

Η πράσινη ανάπτυξη αναγνωρίζει τα πιεστικά περιβαλλοντικά προβλήματα που απειλούν τον πλανήτη, αλλά διατηρεί μία αισιόδοξη οπτική αναφορικά με τη σχέση οικονομικής ανάπτυξης και περιβαλλοντικής προστασίας. Θεωρεί ότι η οικονομία μπορεί να συνεχίσει να αναπτύσσεται αρκεί να είναι προσανατολισμένη στην εξεύρεση νέων επενδυτικών ευκαιριών σε καινοτομίες και τεχνολογικές εξελίξεις που οδηγούν στο «πρασίνισμα» της οικονομίας. Αυτό υποτίθεται ότι θα οδηγήσει σε μία σταδιακή αποσύζευξη της οικονομικής ανάπτυξης από την χρήση των πόρων και τον περιβαλλοντικό αντίκτυπο. Τα επιστημονικά δεδομένα εγείρουν σοβαρές αιτιάσεις ως προς την υπόθεση της αποσύζευξης, και θεωρίες που στέκονται κριτικά απέναντι στην ανάπτυξη έχουν προτείνει εναλλακτικές πολιτικές για την περιβαλλοντική και κοινωνική βιωσιμότητα. Αυτές οι μη ορθόδοξες θεωρίες και αναλύσεις φαίνεται να αποκτούν ευρύτερη αποδοχή τελευταία.

ΛΕΞΕΙΣ-ΚΛΕΙΔΙΑ: Πολιτικές για την αποανάπτυξη, πράσινη ανάπτυξη, αποσύζευξη, βιωσιμότητα, ΟΟΣΑ, Ευρωπαϊκή Πράσινη Συμφωνία.

1. Introduction

There is mounting evidence and alarming warnings by the global scientific community that future environmental conditions will be far more dangerous than currently believed and that the "scale of threats to the biosphere and all its lifeforms -including humanity- is in fact so great that it is difficult to grasp for even well-informed experts" (Bradshaw et al. 2021. See also Ripple et al. 2020, 2017; IPCC 2018; Ehrenreich 2021). Main areas of concern include the rapid loss of biodiversity and declining ecosystem services (creating health risks, such as the Covid-19 pandemic), danger of mass extinction of 20 percent of all species, population growth, and most importantly, the emergence of an affluent middle class worldwide, resulting in overconsumption and an increasing demand for energy and materials. Moreover, this contributes to increased production of waste, anthropogenic despoliation of two-thirds of the oceans, and alteration of 70 percent of the planet's land and the climate. The most disturbing thing of all, however, is the failure of the mainstream sustainable development and green growth policies to achieve even modest sustainability goals.

While economic growth is seriously harming the environment, sustainability's record in terms of its socio-economic aspects is not so sterling either. In many cases, what we are witnessing is a rise in the rate of debt, unemployment, poverty and inequality. Since 1980, the world's top 1% income share has captured twice as much total growth than the bottom 50% – and the top 0.1% income bracket has captured as much of the planet's growth as the bottom half of the world's population. Income growth has been sluggish or even non-existant for individuals with incomes between the global bottom 50% and top 1% groups. Increasing income inequality and the large transfer of public wealth to private capital that has been occurring over the past forty years has led to a rise in wealth inequality: at the global level the top 1% share of wealth increased from 28% in 1980 to 33%, while the bottom 75% share oscillated at around 10% (see Alvaredo et al. 2018: 286, for the above figures).

The global sustainable development goals (SDGs) of the 2030 Agenda (UN General Assembly Resolution 2015), as well as various green economy and green growth agendas that have been introduced by the UNEP (2011), OECD (2011, 2017), World Bank (2012), and the European Union (European Commission 2019), are aimed at tackling these challenges. As the OECD (2011: 4) puts it, "green growth means fostering economic growth and development, while ensuring that natural assets continue to provide the resources and environmental services on which our well-being relies. To do this, it must catalyse investment and innovation which will underpin sustained growth and give rise to new economic opportunities. We need green growth because risks to development are rising as growth continues to erode natural capital. If left unchecked, this would mean increased water scarcity, worsening resource bottlenecks, greater pollution, climate change, and unrecoverable biodiversity loss."

Although the green growth approach recognizes the pressing environmental and social challenges that exist, it presumes that the economy can continue to grow as long as it is geared toward finding new investment opportunities in innovations and technological developments that will lead to the greening of the economy. Economic growth will then address the problems of unemployment and poverty, bringing back prosperity for all. In this article, I will be supporting the claim that green growth is based on false premises and unrealistic expectations. I will then refer very briefly to an alternative perception of sustainability (degrowth) and present an indicative list of concrete alternative-to-growth policy proposals that can contribute to the sustainability cause. A recent "self-critical" OECD publication, making the case for the need for a paradigm change is offered at the conclusion.

2. Green growth's flaws

Green growth is based on the premise that the economy can continue to grow as long as it is gradually decoupled from resource use and environmental impacts. In the mainstream policy contexts of national states and international organizations, this decoupling is expected to be achieved primarily through the advancement of science, technology and some new regulatory initiatives. Investing in environmentally-friendly technologies and supporting industry to innovate are some of the main policy initiatives, and, of course, the goal is to boost the efficient use of resources by moving to a clean, circular economy. While green growth should be considered not as a replacement but as a subset of sustainable development (OECD 2011: 5), it is noted that the global 2030 Agenda includes as policy goals both decoupling (SDG 8.4) and sustainable consumption (SDG 12). The same decoupling goals are shared by the European Union's ambitious green growth policy framework in the case of the European Green Deal (EGD), which is defined as "a new growth strategy that aims to transform the EU into a fair and prosperous society, with a modern, resource-efficient and competitive economy where there are no net emissions of greenhouse gases in 2050 and where economic growth is decoupled from resource use" (European Commission 2019: 2). As stated in the same Communication, the EGD is a roadmap for making the EU's economy sustainable, and this will happen by turning climate and environmental challenges into opportunities across all policy areas and making the transition just and inclusive for all.

There are many important goals and policy areas that the EGD covers: climate-neutrality commitments for 2050, improved emission reduction targets for 2030, a new Just Transition Fund for supporting the most affected people, such as those in industrial, coal and energy intensive regions, a Biodiversity Strategy for 2030, zero pollution policies, reducing the carbon footprint of the transportation sector, ensuring that the blue economy contributes to decarbonization, a new circular economy action plan, as well as a new "Farm to Fork" strategy for sustainable food, Carbon Border Tax, and review of the Energy Taxation Directive.

There can be no objection to these goals, and the strong political commitment and will that have been expressed by all the EU institutions to make Europe the world's first climate-neutral continent is noteworthy. It seems, however, that scientific evidence coming from many reliable sources seriously questions one of the basic premises of the green growth paradigm; that of decoupling economic growth from environmental degradation, resource and energy use. Not only is decoupling not taking place, but is not likely to do so successfully in the future either; at least if the sustainability policy mix does not take into consideration alternative measures that are not currently part of the green growth agenda. As Jackson's (2009) comprehensive discussion of the "myth of decoupling" has concluded, "it is entirely fanciful to suppose that 'deep' emission and resource cuts can be achieved without confronting the structure of market economies" (p. 57).

Parrique et al's (2019) review of the empirical decoupling literature demonstrates that absolute,[1] global, permanent, and sufficiently fast and large decoupling of environmental pressures (both resources and impacts) from economic growth simply is not happening. Furthermore, Parrique et al. (2019) list seven reasons why decoupling is not likely to occur in the future, at least to the extent that the green growth proponents anticipate: (1) rising energy expenditures (extraction of the remaining stocks of resources is more energy-intensive and hence less environmentally friendly); (2) rebound effects (efficiency improvements are counterbalanced by increases in consumption); (3) problem shifting (technological solutions to one problem can create new ones or exacerbate others); (4) underestimated impact of the service sector (services have a significant

footprint as they exist more in a complementary rather than a substitutional fashion to the material economy); (5) limited potential of recycling (recycling processes still require energy and raw materials, and the ability to provide resources remains limited); (6) insufficient and inappropriate technological change (technological progress is not targeted to ecological sustainability and it fails to displace undesirable technologies fast enough); and (7) cost shifting (apparent decoupling results mostly from an externalization of environmental impact from high-consumption to low-consumption countries).

Another literature review by Hickel and Kallis (2020) on the two primary dimensions of decoupling – resource use and carbon emissions – concludes that: "(1) there is no empirical evidence that absolute decoupling from resource use can be achieved on a global scale against a background of continued economic growth, and (2) absolute decoupling from carbon emissions is highly unlikely to be achieved at a rate rapid enough to prevent global warming over 1.5°C or 2°C, even after optimistic policy conditions".

Ward et al. (2016) respond to the use of some national or regional OECD data showing an apparent decoupling of GDP from specific resources by arguing that the illusion of decoupling may be presented as reality by mechanisms such as: a) the substitution of one resource for another; b) the financialization of one or more components of GDP that involves increasing monetary flows without a concomitant rise in material and/or energy throughput; c) the exporting of environmental impact to another nation or region of the world, through the spatial separation of production and consumption (raising in this way the political issue of environmental justice and the relationship between the countries of the Global North and Global South); and d) a rise in GDP that, due to growing income inequality, is not followed by a rise in material and energy throughput, as the income generated goes primarily to the wealthy few, whereas the broad majority of the population have limited opportunities to enjoy rising levels of consumption.

The same study (Ward et al. 2016: 10) points out that "decoupling of GDP growth from resource use, whether relative or absolute, is at best only temporary, as permanent decoupling (absolute or relative) is impossible for essential, non-substitutable resources because the efficiency gains are ultimately governed by physical limits". The study concludes that "growth in GDP ultimately cannot plausibly be decoupled from growth in material and energy use, demonstrating categorically that GDP growth cannot be sustained indefinitely. It is therefore misleading to develop growth-oriented policy around the expectation that decoupling is possible" (p.10).

While economic growth cannot be decoupled from resource use, the proposed solution of extending the use of existing resources within the economy – by recycling – is not working either. Not so much because the figures still remain low: global economy in 2020 was only 8.6 percent circular (De Vit et al. 2020) and nearly 12 percent of material inputs were recycled in the EU-27 in 2019 (Mayer et al. 2019; Eurostat 2020; Strand et al. 2021). But because full circularity is impossible, due to biophysical processes and thermodynamic constraints, and, even though waste management technologies and increasing recycling rates of materials should be overwhelmingly supported, it is a fact that overall "recyclable material remains a meagre portion of material throughput" (Strand et al. 2021; Kovacic et al. 2019). There exists an enormous "circularity gap", as the industrial economy is not circular but entropic (Haas et al. 2015, 2020; Giampietro & Funtowicz 2020; Martinez-Alier 2021), constantly requiring new supplies of energy and materials, and producing waste that pollutes the environment.

Green growth's false premises stem from the unwillingness of its proponents to seriously tackle the main cause of environmental degradation and climate crisis, due to the way the capi-

talist, profit-driven economy and society is run, and the consequent lack of interest of pursuing an alternative, yet more sustainable, course to progress and well-being; inasmuch as this would require a halt in economic growth and market expansion. Wiedmann et al's. (2020) study summarizes the evidence that "for over half a century, worldwide growth in affluence has continuously increased resource use and pollutant emissions far more rapidly than these have been reduced through better technology. The affluent citizens of the world are responsible for most environmental impacts and are central to any future prospect of retreating to safer environmental conditions", and holds that "any transition towards sustainability can only be effective if far-reaching lifestyle changes complement technological advancements. However, existing societies, economies and cultures incite consumption expansion and the structural imperative for growth in competitive market economies inhibits necessary societal change".

The empirical findings (and theoretical postulations) that disprove green growth's premises should not be a reason for abandoning policies at a national, regional and international level that aim at a more sustainable growth path, but they do suggest that alternative strategies for sustainability should be pursued as well. However, this is not an easy and value-neutral task of merely freely complementing policy options from other agendas that are based on different – if not opposing – perspectives to sustainability.

3. Alternative to growth approaches and policy proposals

If the efficiency-oriented policies of green growth seem to fall short of expectations, an alternative or complementary approach that would promote sufficiency-oriented policies is deemed necessary, and that may require a direct downscaling of economic production and consumption in the wealthiest countries (Parrique et al. 2019: 5). There's a burgeoning literature of alternative sustainability research and theory that has been developed in the tradition of steady-state economy, post-growth and degrowth frameworks (see, among many others, D'Alisa et al. 2015 for an overview of the concepts). Criticism against the relentless pursuit of economic growth that benefits the few and demands enormous social and ecological sacrifice brings forth the case for degrowth (Kallis et al. 2020); in other words, "living with less, but living differently, prioritizing wellbeing, equity and sustainability".

Jackson's (2009: 94) classic report on "prosperity without growth" argues that the achievement of a lasting prosperity relies on providing capabilities for people to flourish within certain limits that are established by the ecology and resources of a finite planet. This requires change on two fronts: a) a new macro-economics for sustainability that will have to be ecologically literate and will reduce the structural reliance on consumption growth; and b) the provision of real, credible alternatives through which people can flourish and participate fully in the life of society, without recourse to unsustainable material accumulation and unproductive status competition.

Daly's (1991) call for a transition of affluent societies to a "steady-state economy" condition – that is, a "non-growing" economy, where material throughput (extraction of "low entropy" raw materials from nature and their return to nature as "high entropy" waste) is retained within the regenerative and assimilative capacities of the ecosystem – is supported by the degrowthers, who advance their alternative-to-growth vision. Degrowth can be achieved through transformative strategies and policies that allow societies to slow down by design and certainly not disaster, as in the case of the Covid-19 pandemic or other periods of economic crisis and contraction.

It is important to emphasize that degrowth's arguments against the growth-oriented economy are not meant in a techno-managerial and utilitarian fashion so as to find more efficient ways of "preserving life on the planet", but rather are explicit attempts to bring the political dimension back to the forefront of public discourse on sustainability, equity and well-being. As Serge Latouche (2009), one of degrowth's pioneers, stresses, "the de-growth movement is revolutionary and anticapitalist (and even anti-utilitarian) and its programme is basically political" (p. 92); "I am not recommending de-growth for the sake of de-growth. That would be absurd, but, all things considered, no more absurd than preaching the gospel of growth for the sake of growth. The slogan of 'de-growth' is primarily designed to make it perfectly clear that we must abandon the goal of exponential growth, as that goal is promoted by nothing other than a quest for profits on the part of the owners of capital and has disastrous implications for the environment, and therefore for humanity" (p. 7).

A wealth of policies towards a more equitable and sustainable future has been proposed by various authors and institutions that are critical of the mainstream green growth approach. Parrique's (2019: 492) extensive analysis of 27 degrowth policy agendas, resulted in 232 proposals, which are decomposed into 60 goals, 32 objectives, and 140 policies. Lists of policies can be found, among others, in Latouche 2009; Daly 2013; Jackson 2009; Kallis 2011, 2015; Kallis et al. 2012; Cattaneo and Vansintjan 2016; Cosme et al. 2017. It is true that a policy intervention in one area may have unintended or expected impacts in other policy areas, and more research or pilot implementation will be needed in order to better calibrate potential trade-offs and synergies across different policy fields. In any case, it should be clear that public policies are not "value-free", as they affect specific interests of the social actors involved and the mode of operation of the economy and society. Thus, choosing a policy option is not a technical issue that will be determined by technocrats, but a political issue that ideally has to be democratically discussed and decided by well-informed citizens and their representatives. Advocacy coalitions and resistance to these policies are expected to take place, as well as an overall rearrangement of power relations in case a new set of public policies along these lines will successfully be introduced (admittedly, not a realistic scenario today).

It should be noted that versions of these proposals are already part of national or regional (EU) policy frameworks, such as basic income schemes, job/youth guarantee programs or environmental taxes. And non-commodified labor practices (social and solidarity economy, unpaid domestic labor) not only co-exist with the dominant capitalist relations, but are vital for the reproduction of the labor force. Hence, a coherent paradigm change would require a strong comprehensive package of manifold policy measures combined and aimed at a sustainable path that will prioritize societal equity and well-being over economic growth. Full employment and a good standard of living, for example, are not to be sought by conventional economic growth approaches that increase material and energy throughput, socioeconomic metabolism and inequalities. Of course, any degrowth-oriented measures should be fair and socially sustainable, and so the tax or resource cap burdens must be accompanied by affordability safeguards and start from the top income brackets of the population.

A very limited, indicative selection of a few policy proposals follows, so as to offer a glimpse of some of the options available for alternative-to-green growth approaches.

a) Policies that limit inequalities and enhance socio-economic sustainability.

1. Basic and maximum income.

Unconditional basic income (van Parijs 2004; Raventós 2007) is based on the idea that everyone in society has a right to a minimum income. No means testing or work requirement is needed, hence unemployment and other benefits will be replaced, and the funding will come from taxation. This measure can tackle poverty and unemployment in a more profound way, as it places limits to the power of employers in the labor market and forces them to offer better jobs. On the negative side, this measure, if not accompanied by other interventions, is likely to have adverse effects on the environment. On the other end, maximum income is not only a reform designed to limit inequality, but can have positive effects on environmental pressures. Maximum income is also justified by sociological research indicating that once basic material needs are met, further increases in income contribute little if anything to subjective wellbeing or happiness (Alexander 2012). This policy can be achieved either by setting an income ceiling in proportion to the existing minimum wage or proposed basic income (e.g. maximum income should not exceed a fivefold difference from the established minimum wage or basic income), or it can take the form of a progressive income tax that could reach a 90% or 100% rate above a certain level of income coming from capital (Cattaneo and Vansintjan 2016: 16).

2. Job guarantee.

In this case, the government acts as "an employer of last resort", addressing the problem of unemployment. As in basic income, a decommodification of labor power is taking place, and a type of Keynesian or socialist full-employment agenda inhibits profit-driven economic growth. Concerning the trade-off between environment and the economy, Unti (2017) argues that "job guarantee decouples employment from economic growth and establishes a path for the reconciliation of economic and environmental goals". Cattaneo and Vansintjan (2016: 15) very briefly compare the pros and cons of basic income vs job guarantee and conclude that as both proposals have uncertain environmental effects, it makes sense for ecologists to only debate policies with explicit aims toward a green basic income or green job guarantee. They further suggest that the two policies, rather than being viewed as alternatives, should be considered as complementary.

3. Reduction of working hours and work-sharing.

According to Jackson (2009: 105), in a declining or non-increasing economy, work time policies are essential for two main reasons: to achieve macro-economic stability and to protect people's jobs and livelihoods. For this reason, he suggests that one out of the twelve steps to a sustainable economy is sharing work and improving the work-life balance. The reduction of working hours is beneficial to the environment (lower carbon emissions and ecological footprint), while work-sharing not only avoids the problem of unemployment, but also promotes the value of free time. As Schor (2015) points out, "in the work-centric societies of the Global North, family, community, and political life suffer as people do not have sufficient leisure for social activities. Social relations are time-intensive; long working hours reduce investment in social connections and produce higher television viewing and exhaustion. Similarly, short working hours are essential for robust participation in democratic governance." It is important to note that "the degrowth proposal calls for a reduction of working hours in the paid sector substituted by more useful and if possible gratifying work in the self-employed or unpaid sector. It is not a universal call for reduction of work…" (Kallis 2013: 95).

b) Policies directed toward environmental sustainability.

4. Ecological tax reform.

Daly (2013) calls for a "shift in the tax base from value added (labor and capital) to 'that to which value is added,' namely the entropic throughput of resources extracted from nature (depletion) and returned to nature (pollution)." In other words, don't tax what you want to encourage (value-added to natural resources by capital and labor), and tax what you want to discourage (resource depletion and pollution). This tax shift will price the scarce but previously un-priced contribution of nature. Jackson (2009: 106) also advances the argument of shifting the burden of taxation from economic goods (e.g. income) to ecological bads (e.g. pollution).

5. Resource and emission caps.

There should be a limit to the amount and rate of depletion and pollution that the economy can be allowed to impose on the ecosystem (Daly 2013), hence, identifying and imposing strict resource and emissions caps is vital for a sustainable economy. Jackson (2009: 106) suggests that declining caps on throughput should be established for all non-renewable resources, sustainable yields should be identified for renewable resources and limits should be established for per capita emissions and waste. Effective mechanisms for imposing caps on these material flows should be set.

c) Policies initiating institutional reforms that promote a paradigm shift toward non-relying-to-growth prosperity.

6. Reliance on other indicators instead of GDP to measure prosperity and formulate economic policies.

The shortfalls of conventional GDP measurement are well-established, and according to Jackson (2009: 104), new measures of economic well-being will need "to account more systematically for changes in the asset base; to incorporate welfare losses from inequality in the distribution of incomes; to adjust for the depletion of material resources and other forms of natural capital, to account for the social costs of carbon emissions and other external environmental and social costs; and to correct for positional consumption and defensive expenditures." Daly (2013) claims that natural capital consumption and defensive expenditures belong in the cost account, therefore, after comparing the costs and benefits, the growing throughput should be halted when marginal costs equal marginal benefits. In addition, the subjective studies showing that after a threshold further GDP growth does not deliver more happiness should be taken into consideration. Furthermore, Kallis (2015) suggests that a debate needs to take place regarding the nature of well-being, focusing more on what to measure rather on how to measure it.

7. Support of the social and solidarity economy and other forms of non-commodified practices.

Legislation that will introduce tax exemptions and subsidies to the not-for-profit enterprises, co-operatives and networks that are "doing business with social value", and other policies that facilitate the de-commodification of spaces and activities of care and creativity should be promoted (Kallis 2015). The "third-sector" economy not only contributes to combating unemployment and social exclusion, but it also institutes democracy in production and work. Furthermore, cooperatives tend to use natural resource inputs more efficiently than corporations and are less growth oriented (Booth 1995).

The list can go on and on. Latouche (2009), in his "quasi-electoral" program for a transition to a degrowth society, proposes, among other things: a) massive cuts in "intermediate consumption" (transport, energy, packaging, advertising), so as to get us back to an ecological footprint equal to or smaller than the planet (today humanity uses the equivalent of 1.6 Earths to provide the resources we use and absorb our waste) ; b) relocalization of activities, so that the need to transport large numbers of people and quantities of commodities around the world is kept in check; c) revitalization of local agriculture; d) transformation of productivity gains into reduced working hours and increased job creation; e) encouraging the "production" of relational goods, such as friendship and neighborliness; f) imposition of stiff penalties for spending on advertising. Also, Rigon (2017) has a list of 19 policy proposals that could contribute to degrowth, and, in a more systematic exposition, Cosme et al. (2017) have reviewed and analyzed a big number of articles on degrowth that include policy proposals, categorized in three broad goals: (1) reduce the environmental impact of human activities; (2) redistribute income and wealth both within and between countries; and (3) promote the transition from a materialistic to a convivial and participatory society.

Alternative communities of conscious withdrawal from capitalist culture and economy are also to be supported (Kallis et al. 2012). From collective food consumer–producer cooperatives and urban gardens, non-money markets of exchange, local currencies or time-banks, to collective living and co-housing, such "post-capitalist" spaces invert the logic of commodification, build on conviviality and tend to be less resource-intense than their market equivalents. Integration and empowerment of local and bottom-up action is considered one of the means through which a more "reflexive" form of capitalism that recomposes existing consumption patterns could be achieved (Gough 2017). Examples of local community ethics, economy and politics that develop non-capitalist and democratic relations form the basis of post-capitalist politics (Gibson-Graham 2006). Emergent convivial communities form "an elaborate, decentralized, uncoordinated collective research and development effort exploring a potentially post-capitalist, post-petroleum future" (Carlsson and Manning 2010).

4. Concluding remarks: time for a paradigm shift?

The above policy proposals and innovative models of local living pave the way toward an equitable, democratic and sustainable non-growth-oriented future, but they also face a constant threat of co-optation. Elements of alternative policy proposals and modes of living can be re-interpreted and integrated into mainstream policy settings, but most of the time in a non-transformative manner, as the more radical features have been weeded out. This usually occurs when dominant policies fail to address major challenges (Trantas 2021).

It seems that we are experiencing such a condition at the moment. It is no accident that one of the institutional bastions of green growth, the OECD, just published a report with the title Beyond Growth: Towards a New Economic Approach (OECD 2020). The authors of the report acknowledge that the conventional economic theories and policies have been found wanting (p.3), and consider four objectives of economic policy making that should be paramount today: environmental sustainability, rising wellbeing, falling inequality, system resilience (p. 18). As they argue, "going 'beyond growth' means neither abandoning growth as an objective nor relying upon it: it means changing the composition and structure of economic activity to achieve the

multiple goals of a more rounded vision of economic and social progress" (p. 19). Likewise, the authors' Kuhnian claim that after the two previous paradigm shifts of Keynesianism in the 1940s and neoliberalism in the 1980s,[2] "the time is ripe for another such paradigm shift. The frameworks and prescriptions which have dominated policy making in recent decades are no longer able to generate the solutions to the problems and challenges we face today. We need a less incremental, more profound form of change" (p. 31).

This reflective report demonstrates that well-argued and evidence-based critical theories may take some time to be recognized, but can eventually be heard and succeed in winning over a skeptical audience. Of course, in the political-discursive terrain, good and rational arguments do not circulate alone, but compete with material practices, vested interests, established ideologies, powerful institutions, passions and habits. Nevertheless, and regardless of the reservations that may exist concerning the eclectic tone of the last sentence, as a social scientist, I find it worth quoting the following extended excerpt from the report as a concluding remark for this article: "Across a whole range of issues, economists working in both mainstream and non-orthodox traditions – in many cases informed by other social sciences – have developed new theories and analytical frameworks which can better explain the way in which modern economies work, and why they don't. Many of these frameworks, some of them reformulations of older theories, have good claims to provide a better fit with the evidence, and in turn greater explanatory power, than those which continue to dominate mainstream policy making and public discourse. As the empirical validity and theoretical value of these alternative approaches is increasingly recognized, the boundaries between 'mainstream' and 'heterodox' forms of economics are breaking down" (OECD 2020: 21, 22).

Notes

1. There is relative decoupling (resource use and environmental impact grows less than GDP), which is achievable through more efficient, cleaner and less wasteful use of energy and resources, although it is well documented that any gains in efficiency and lower resource use in a product or service, if left alone, without proper policy interventions (such as green taxes, cap and trade, higher emission standards), are usually offset by rebound effects that present an increase in demand, consumption and production of that product or service (the so-called 'Jevons paradox'; see Polimeni et al. 2008). And there is absolute decoupling (economy grows but resource use remains at least stable or decreases), which does not appear to be achievable. What matters for sustainability is absolute decoupling, because we all live in a finite world –one planet with limited resources.
2. "Social scientists describe these moments of economic change as 'paradigm shifts' – periods when old orthodoxies are unable either to explain or to provide policy solutions to conditions of crisis, and new approaches take their place" (OECD 2020: 31).

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Ελένη Πρόκου

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Το βιβλίο αυτό επιχειρεί να αναλύσει και να ερμηνεύσει τις πολιτικές για την εκπαίδευση ενηλίκων και τη διά βίου μάθηση στην εποχή της παγκοσμιοποίησης. Στο κέντρο του ενδιαφέροντός του είναι η Ευρώπη, υπό την έννοια τόσο της συγκριτικής μελέτης των εν λόγω πολιτικών σε επιλεγμένες ευρωπαϊκές χώρες όσο και της ανάλυσης και ερμηνείας της ευρωπαϊκής πολιτικής για τη διά βίου μάθηση. Ιδιαίτερη έμφαση δίνει στις επιδράσεις της πολιτικής της Ευρωπαϊκής Ένωσης για τη διά βίου μάθηση στην Ελλάδα, καθώς και στην περιγραφή του θεσμικού πλαισίου λειτουργίας των βασικών φορέων εκπαίδευσης ενηλίκων στη χώρα μας.

Το παρόν βιβλίο φιλοδοξεί, έτσι, να συμβάλλει στην κατανόηση της εξέλιξης του πεδίου της εκπαίδευσης ενηλίκων/διά βίου μάθησης στην Ευρώπη και την Ελλάδα, και να θέσει το πλαίσιο προβληματισμού για περαιτέρω έρευνα στις πολιτικές για το εν λόγω πεδίο. Απευθύνεται σε εκπαιδευτικούς, φοιτητές, εργαζόμενους και γενικότερα σε όσους ασχολούνται με την εκπαίδευση.

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Κοινωνική Συνοχή και Ανάπτυξη 2022 17 (1), 37-52

Implementing "Automatic Pilots" for Greek pension reform. Managing the pension crisis against social insurance values

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Εφαρμόζοντας "αυτόματους πιλότους" στην ελληνική συνταξιοδοτική μεταρρύθμιση. Η διαχείριση της συνταξιοδοτικής κρίσης εις βάρος των αρχών της κοινωνικής ασφάλισης

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ABSTRACT

Automatic Adjustment Mechanisms have increasingly been seen as both a way in which to depoliticize unpopular pension cuts and as a mechanism to restore social insurance principles, such as generational equity and actuarial fairness in the Greek pension system. An overview of the features of AAMs for main and auxiliary pensions in Greece is followed by an analysis of their implementation in the decade 2010-2020. It is shown that the attempt at the sudden imposition of an AAM during a period of severe economic crisis undermines and prevents the functioning of AAMs.

KEY WORDS: Automatic adjustment mechanisms, actuarial fairness, budgetary discipline, Pension reform

ΠΕΡΙΛΗΨΗ

Οι Μηχανισμοί Αυτόματης Προσαρμογής αντιμετωπίζονται σε αυξανόμενο βαθμό ως μέσο αποποπολιτικοποίησης των αντιδημοφιλών περικοπών συντάξεων και ως μηχανισμό αποκατάστασης των αρχών της διαγενεακής και αναλογιστικής δικαιοσύνης στο ελληνικό σύστημα κοινωνικής ασφάλισης. ύστερα από μία επισκόπηση των Μ.Α.Π. στις κύριες και επικουρικές συντάξεις στην Ελλάδα, αναλύεται η εφαρμογή τους κατά την δεκαετία 2010-2020. Αναδεικνύεται ότι η απόπειρα ξαφνικής επιβολής Μ.Α.Π. κατά τη διάρκεια μίας περίοδου οξείας οικονομικής κρίσης δεν επιτρέπει τη λειτουργία τους.

ΛΕΞΕΙΣ-ΚΛΕΙΔΙΑ: Μηχανισμοί αυτόματης προσαρμογής, αναλογιστική δικαιοσύνη, δημοσιονομική πειθαρχία, συνταξιοδοτική μεταρρύθμιση

1. Introduction

Since the 2000s, Automatic Adjustment Mechanisms (AAMs) have increasingly been seen as both a way in which to secure the costs of demographic ageing, budgetary discipline, actuarial fairness and intergenerational equality, providing a new basis of legitimization of social security reforms and as a mechanism to manage smoothly the need for unpopular reforms, through de-politicization (Queisser & Whitehouse, 2006; Sakamoto, 2013). They stem from a tradition of established automatic adjustments that initially protected the purchasing power of pensions (Weaver, 1988; Fernandez, 2012) but which are now used to secure the financial sustainability of social security institutions as well (Capretta, 2007, Hohnerlein, 2019).

AAMs are being promoted to pension systems throughout the world as "best practices" (Holzmann et al., 2013). Such automatic mechanisms accompany the reconfiguration of public pension protection. As such, the introduction of AAMs depends upon the broader direction taken by reforms with a parametric or even a structural nature (Palier, 2005). The international scholarship on the subject has pointed to the advantages and disadvantages of AAMs – depending on their individual characteristics – in comparison to the ad hoc political initiatives undertaken to reform pension systems (Börsch-Supan et al., 2003; Sakamoto, 2008; OECD, 2012).

The introduction of AAMs in 2010 was part of a broader reform of the country's pension system. During the decade 2010-2020, a period during which the pension system in Greece was struck by the severe financial crisis, the labor market crisis and the fiscal crisis of the Greek state and the policies of internal devaluation (Sakellaropoulos, 2019).

2. The adoption of Automatic Adjustment Mechanisms

As a rule, governments are very reluctant to reform pension systems, given the great political cost this involves (Gannon et al., 2014). The political controversy that is generated very often leads to serious political and social disagreement, even conflict (Marier, 2008; Weaver & Willen, 2014; Wisensale, 2013). For this reason, governments do not often undertake such initiatives, preferring to defer any measures that will ensure the sustainability of pension systems. As a consequence, action is taken only once the sustainability of the system has reached a critical point (Blanchet & Legros, 2002). As Turner notes, ad hoc pension reforms "have a high degree of political risk because their timing and magnitude are unknown" (Turner, 2009). In order to avoid such political cost or ineffective political handling, governments have adopted AAMs in order to depoliticize the decision to reform (Vording & Goudswaard, 1997; Gannon & al., 2014).

The analysis of AAMs in the international scholarly literature since 2000 (Bosworth & Weaver, 2011; Gannon et al., 2014; OECD, 2012) suggests that the direction of future adjustments is prescribed in such a way that the manner of adjustment can be foreseen. Their triggering depends upon a variety of quantifiable measures in the form of "governance by numbers" (Supiot, 2015). AAMs ensure greater transparency and predictability in the development of pension plans. At the same time, however, the right to a pension, its level and the factors that determine eligibility become the key factors of adjustment. A drop in GDP, an increase in life expectancy or in prices, a fall in overall income or a rise in expenditure ultimately leads to a predefined adaptation of various pension protection parameters (Konberg et al., 2006). Parametric changes are adjusted over time without any further legislation being necessary, in line with changes in real or projected economic or social indicators.

Automatic adjustments embody social security principles and values, adapting public pension systems to 21st century challenges. With AAMs, institutional parameters are adjusted according to predetermined rules and a predetermined procedure that is triggered in response to quantified indicators. Otherwise, the changes are seen as isolated and ad hoc reforms of a political nature that the government has deliberately selected and for which reason they tend to aim at avoiding political costs (Bosworth & Weaver, 2011).

AAMs clarify the direction of the changes by predetermining the reform decision, thus "locking in" the political decision which might otherwise be avoided due to its unpredictable character. The AAM can therefore be understood as an instrument with which to depoliticize

the management of the fiscal sustainability of unfunded Pay-As-You-Go public pension plans. This gives the decision to adjust a technical nature, by making apparent the need for certain measurable changes that will affect the accounting balance of the pension system without the accompanying need for a political judgment (Anderson, 2005) that is regularly accompanied by political controversy and dispute as to whether this adjustment is suitable, necessary or unavoidable. AAMs are therefore essential when "routinizing decision-making" (Korpi, 2001). Adopting these kinds of mechanisms also provides an element of social fairness, by ensuring a stable relationship of actuarial equity for the burden of contributions across generations (D'Addio & Whitehouse, 2012).

Automatic adjustments may be directly linked to income, benefits and the retirement age. They may respond to adjustments to the level of income, an increase in the salary on which the contribution is paid, an increase in the rate of contribution, or increases in the taxation of social security benefits. As for benefits, there may be adjustments to the level of these benefits and one option could be an automatic change in their level. By introducing adjustments as to how benefits are calculated, in cases involving the cost of living, an automatic mechanism may be applied either to all pensioners or only to future pensioners or to a subgroup of pensioners. Changing the retirement age is another way of adjusting the levels of benefits.

Research into AAMs has focused on their adoption and implementation rather than on their resilience. Despite this, they have not quite succeeded in "lashing politicians to the mast" of automatic cutbacks (Weaver, 2016) and building a system bound to last "until the next ice age" (Lundberg, 2009). According to Weaver's (2016) categorization, there are four modifications to AAMs that one can consider: abolition, weakening, strengthening, and fine-tuning. The most obvious change to the parameters of an AAM is its weakening because of the changes that are continuously made to it and in such a way as to neutralize its effects. Weakening can occur because of the time threshold on which sustainability projections are made. These adjustments may also impact the end result: a reduction in pension taxes, for example, can mean that the net pension remains the same even though the gross pension has been cut (Sundén, 2009). Implementation of AAMs may temporarily be suspended or their effects delayed for an unspecified or specified period. An economic recession may result in an AAM being weakened in order to avoid the immediate political losses from its triggering. Consequently, an economic crisis can lead to a financial crisis, such as a reduction in payments to a pension system, which poses a challenge for the AAM that has already been implemented (Weaver, 2016).

Within this context, the mechanisms that are being introduced in Greece, their purpose and the application problems will be examined.

3. The values and orientations of Social security reforms in Greece and the role of AAMs

The extensive reforms undertaken in the period 2010-2020 have not been limited to parametric reforms but they also contribute to the regulatory reframing of social security in Greece towards a multi-pillar model (Sakellaropoulos, 2012). Since 2010, the Greek pension system has been undergoing a structural redesign, aiming at the gradual adoption of a new social insurance system, with fundamentally different rules, a new balance between rights and obligations, a new architecture for the pension system and new principles for legitimization and justice. The Greek

public debt crisis has been the catalyst for overcoming social and political resistance (Stergiou, 2015) and facilitated a radicalization of the reforms that had begun in the 1990s (Venieris, 2013).

The restructuring of the Greek pension system in the period 2010-2020 took place on multiple pension policy levels. The first reform level consisted of immediate and drastic benefit cuts of a parametric character (Palier, 2005) that aimed at fixing the urgent sovereign debt crisis. The parametric changes in 2010-2020 consisted of freezing pension indexation and reducing pensions, raising the retirement age and the number of required contribution years, reducing replacement rates and introducing early retirement penalties. The reforms of 2010, of 2012 and of 2015 raised the retirement age for all insured persons, men and women, to 67 or 62 for those with 40 years of insurance. The adequacy of public pensions has been significantly reduced by the extension of the insurance period for a full pension from 35 to 40 years, while for the same pension category the statutory age has shifted from 58 to 62 years of age. The accumulation of pension reductions since 2010 has led to a medium-term reduction in pensions by 40%, at approximately 20-25% for low-income pensioners and up to 50% for higher pensions (Nektarios et al, 2018).

The second level of pension reforms aims at the restructuring of the system on the basis of intergenerational actuarial fairness. An important role in the redesigning of the pension system is played by both the structural reforms to public pensions and the introduction of AAMs. The full reform is based upon the intergenerational and intragenerational fairness of the pension system (Report, 2015). The backbone of the restructuring of public pensions in Greece lies in the reestablishment of the contributory principle. The contributory part is designed to function linking tightly contributions and pensions. At the same time, since 2012 auxiliary pensions, that is supplementary public pensions of the 1st pillar and under state guarantee, have operated on the basis of notional defined contributions and using computable individual accounts to calculate the pension as an annuity.

Table 1. Comparison of the contributory principle in the 1st pillar. Main and auxiliary pensions

Comparison	Main Pension	Auxiliary Pension
Pension part	Contributory part	Total Auxiliary
Link between contributions/ benefits	Close link between contributions/benefits	Equal value of pension capital with future payments (annuity)
Vertical redistribution mechanism	National Pension mechanism	No prospect of vertical redistribution
Base salary for pensionable earnings	Entire working life	Entire working life
Calculation of replacement rate	DC approach but without the same contribution performance within the year	DC
Goal of pension protection	Closer to working life earnings	Closer to working life earnings
Individualized pension capital	No individual account	Notional Individual account
Protection from increase in life expectancy	Link with life expectancy through external AAMs	Mechanism incorporated into the calculation of the notional annuity

Additionally, a new architecture was introduced within the first public pensions pillar. The existing main and auxiliary pensions have been transformed to create a distinction between contributory pensions that are "as close as possible to the level of a worker's income throughout his or her working life" (Law 4387, article 2) and non-contributory (national) retirement benefits. In terms of the institutional distinction between main and auxiliary pensions, the 2010-2016 reforms (inspired by the different pension functions in multi-pillar pension systems) established an internal distinction of roles, which distinguishes between the contributory part of pensions and the non-contributory part. This has been achieved through the compartmentalization of the main pension into two different segments, the national (solidarity) pension and the contributive part. The social solidarity functions are clearly restricted to a so-called "national pension" that is state financed and intended to alleviate pensioner poverty. The system is made more comprehensible and fully transparent, while the close and transparent link between contributions and benefits is based on the fairness of actuarial equality (Report, 2015). Establishing actuarially fair rules in public pensions is not fully accomplished yet (Leventi & Matsaganis, 2020).

In order to ease political opposition and reduce public protests as well as to ensure its acceptance, the reforms to the new Greek pension system have attempted to depoliticize the decisions regarding public pensions. In the explanatory report of 2010, it is stated that "prescribing the level of the contributory pension ceases hereafter to be an object of government retirement policy and is prescribed in an objective way" and through "a new regime [of Greek public pensions] workers become guardians and co-regulators of the level of their own pension" (Explanatory Report, Law 3863/2010).

The financial viability of the new structural and parametric reforms has been guaranteed since the 2010 reform by Automatic Adjustment Mechanisms (AAMs) (OECD, 2012). All AAMs were included in the MOUs agreed with the troika, under the close supervision of IMF technical support. These mechanisms are indexed to central features of the economy such as GDP growth and demographic trends, so as to avoid any future deficits and to ensure the core principles established with the structural reforms.

4. Design and function of AAMs in the Greek pension system, 2010-2020

For the first time in the Greek social insurance system, with Article 11 of Law 3863/2010 a series of AAMs was foreseen. Different AAMs in Greece aim to face different risks. Statutory retirement age is automatically adjusted to changes in life expectancy. Since 2012, auxiliary pensions operate according to a NDC system assuring actuarial fairness between generations, whereas main pensions are linked to evolution of GDP/CPI restraining pension expenditure growth. Budgetary restrictions are set by a "break" in public pension expenditure (main and auxiliary) connected to the projected evolution of GDP and by an automatic balance mechanism on auxiliary pensions.

These mechanisms were intended as an integral part of the continuous reform of the system, in particular the second level of establishing long-term mechanisms for actuarial fairness. The institutional framework of the AAMs was completed with the 2012 Reform, which reformed the regime for auxiliary pensions, established defined contributions on the basis of notional capitalization and introduced the so-called "zero deficit clause". As a result, there are now four clauses

in Greek laws pertaining to automatic mechanisms intended to ensure the economic balance of the pension system in Greece. The 2016 reform kept intact the principles of AAMs for main pensions and the integrated AAMs for auxiliary pensions but amended the zero-deficit clause and replaced it with a "sustainability clause". Since 2010 and until today, modifications to the social insurance system have been made gradually and with, as a rule, automatic adjustments to the benefits of pensioners. An exception to this in this case is the new sustainability clause for auxiliary pensions, which imposes a temporary rise in contributions in order to avoid a reduction in auxiliary pensions in subsequent years.

AAMs indicate also a guide to exiting the crisis. Mitropoulos points to this logic as the principle by which the social security system can be rescued "from within" (Mitropoulos, 2018). This in practice indicates a long-term plan to address future challenges by reducing pension costs. Stergiou sees the guiding idea behind these mechanisms in the introduction of the financial self-regulation of the system and its "immunization" from politics, because "according to the originators of these mechanisms, the imposition of sacrifices can often not be carried out by politicians" (Stergiou, 2016).

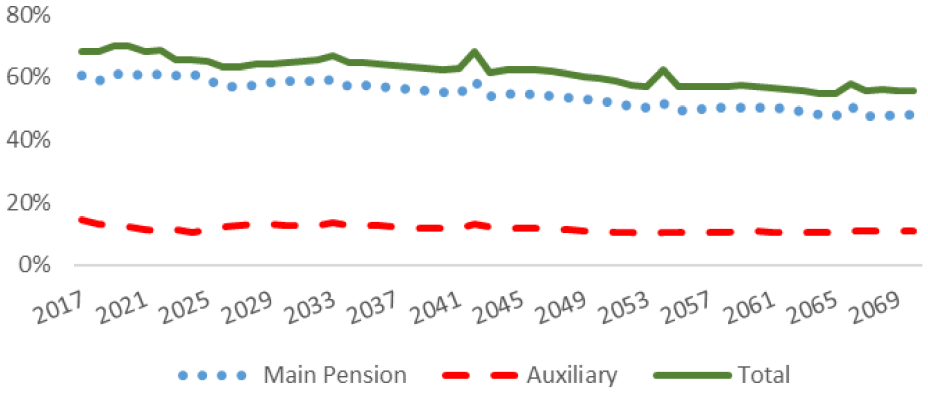
It should be noted that in most countries such mechanisms were introduced after extensive public and democratic debate and they were the result of a broad political consensus (Turner, 2009; Konberg et al., 2006). In contrast, in Greece the policy to ensure the sustainability of the pension system through AAMs was adopted without any prior public debate. The adoption of AAMs and their specific function was made in 2010 without them having first been the subject of a public dialogue and of dispute or consensus and no mention of AAMs is made in the Report on the 2010 reform (Stergiou & Sakellaropoulos, 2010). Right from the start, AAMs in the Greek pension system have not been part of a wide social dialogue, they have lacked the necessary legitimization, and the wider public is not even aware of their existence or their precise function. Although in principle accepted by consecutive governments, no one claims for the political ownership of Greek pension AAMs, since they are the result of the imposed "Troika" agenda under the rules of EU governance and surveillance through MoUs (Clarke & Newman, 2011; Petmesidou & Glatzer, 2015).

The automatic mechanism linking retirement age with increases in life expectancy

Since the 2010 reform, the retirement age was supposed to adjust in line with a rise in life expectancy, based on data from the Hellenic Statistical Authority (ELSTAT) and Eurostat, so as to be implemented for the first time in 2021. As regards the AAM that relates to changes in statutory retirement age, the law of 2010 states that "the pension ages of all insured persons are determined according to changes in the life expectancy of the country's population, with 65 years as the reference age. This stipulation will come into force on January 1, 2021 and during its first implementation, the change in the decade from 2010 to 2020 is to be taken into account. From January 1, 2024, the above thresholds will be reassessed every three years. The adjustment to pension age thresholds is to be implemented by a joint decision of the Minister of Finance and the Minister of Labor and Social Affairs, which will be issued in the final year of each period on the basis of indicators prescribed by ELSTAT and Eurostat and which concern the next period" (Article 11, par. 3 of Law 3863/2010). This position does not allow for a political assessment of the rise in life expectancy and its potential consequences for the economy or society and is to be issued in the form of a joint ministerial decision by the Minister of Finance and the Minister of Labour and Social Affairs.

This kind of AAM is found in most countries with AAMs (Turner, 2009). The increase in life expectancy, to the extent that this can be observed, is a financial cost for the social security system and for this reason a higher burden is foreseen in advance, burdening future pensioners. This will require them to work longer and wait longer to reach retirement age and they will certainly receive a smaller pension than the one they anticipated before the triggering of the mechanism. Economic, demographic and social projections are not optimistic and forecast a gradual fall in replacement rates.

Graph 1. Projection of replacement rates of old-age pensions in Greece, 2017-2070



Source: NAA, 2019

The Greek life expectancy AAM foresees an adjustment that is highly automatic in that the decree authorizes the competent ministers to issue a joint ministerial decision implementing a predefined adjustment formula. Moreover, this mechanism is triggered on the basis of real data, not simply on projections in life expectancy. The European Commission has shown that life expectancy in Greece increased by 10 years between 1960 and 2015 and is expected to increase by a further 6.4 years between 2016 and 2070 (European Commission, 2017). From the Actuarial Study of 2018 (NAA, 2019) it is estimated that, in line with actuarial projections, in 2040 the country's population will have fallen to approximately 9.4 million from 11.75 million in 2016. Men's life expectancy will be 82.6 years (in contrast with 78.8 years today) and that of women will be 88.2 years (as opposed to 83.9 today).

It is thus anticipated that from 2021 there will be an automatic rise in pension ages with the triggering of the AAM, in line with the effective increase in life expectancy, as this will be reported on by ELSTAT in late 2020. The 2020 projections indicate that workers are expected to work and contribute more, retire later (NAA, 2020). As a result, the projections of the Greek National Actuarial Authority (NAA, 2019) estimate a continued rise in effective retirement age for men (from 63 years in 2020 to 67,8 years in 2070) and women (from 62,85 years in 2020 to 68,3 years in 2070) and a continued decrease in time spent at retirement for men (from 32,3 years in

2017 to 29,8 in 2070) and for women (from 35,8 years in 2017 to 32,1 in 2070). Labour force participation rate in the age group of 55- 64 is designed to rise from 45,2% in 2016 to 75,3% in 2060 and in the age group of 65-74 participation rates are projected to rise from 5,4% in 2016 to 33,6% in 2070 (NAA, 2019).

In practice, however, the link between retirement age and life expectancy could not be triggered as planned. Although the relevant AAM was adopted in 2010 and its activation was planned for 2021, the retirement age was significantly increased in 2012 and 2015 without reference to any real, projected, planned or unforeseeable increase in life expectancy. The retraction of the legislative reforms, very often by the same government, in the period under examination reveals why these reforms cannot work in truly urgent and critical conditions.

The increase in the retirement age, deviating from the rule of this AAM, can be explained by the pressing need to make immediate savings in public funds. These increases, however, undermined the apparent credibility of the system that AAMs achieve. The predictability of these changes has already been made devoid of purpose but, most importantly, the legitimizing principle of the mechanism has been irreparably damaged. The link between age threshold and life expectancy is based on the notion of intergenerational equal contribution and the close link between individual contributions and pensions. The constant increase in the age limit (in combination with an increase in period of insurance), however, sacrifices any concept of legitimization on the altar of immediate budgetary savings.

The adjustment mechanism for main pensions in line with developments in Gross Domestic Product and the Consumer Price Index

The 2010 reform introduced an AAM that links adjustments to main pensions with economic developments and changes in the cost of living. In particular, it is foreseen that from January 2016 pensions are to be adjusted each year with a joint decision of the Minister of Finance and the Minister of Labor and Social Affairs on the basis of a coefficient calculated at 50% of the change in GDP and 50% of the change in the Consumer Price Index for the previous year and which does not exceed the annual change in the Consumer Price Index.

This mechanism means that the total pension costs would be adjusted to the new average of the increase in GDP and the CPI, which cannot exceed the increase in the latter. As a result, the purchasing power of pensions will remain stable when GDP is greater than inflation, but will fall if the opposite were the case (Matsanganis, 2011). This will mean that as long as economic growth is higher than salaries, the purchasing power of pensions is secure, but if inflation is greater than growth then the purchasing power of pensions falls. The underlying rationale is to link indexation to financial sustainability considerations (Hohnerlein, 2019). In practice, with the deflationary policy that has been pursued since Greece joined the European Monetary Union in 2001, pensions have to boost anemic markets in times of recession.

Based on the decrees that govern it, this mechanism is annually triggered on the basis of real data and not estimates of the future development of GDP or the CPI. Superficially, it resembles Automatic Wage Indexation, to the extent that this was implemented in Greece, but in a way that is linked to fluctuations in GDP, meaning that the preservation of purchasing power is always subject to the state of the economy. When the economy is booming the adjustment to pensions is limited by the threshold placed on the increase to the CPI. The link to GDP and the CPI thus

creates a double restriction, with a limit on the level of the rise but also with a reduction in pensions. This principle, although it has been adopted, remains unimplemented a decade after it was legislated for. This adjustment was originally planned to operate from 2015, but the date of its implementation was moved to the 2016 Reform. The increase should not exceed the annual change in the CPI. This AAM was not implemented in 2017 and was instead postponed to 2023.

The Automatic Balancing Mechanism in the Notional Defined Contributions model of auxiliary pensions

The 2010-2012-2016 reforms established the principle of the neutrality of the auxiliary pensions budget which meant that the budget of the Unified Auxiliary Social Security and Lump Sum Benefits Fund (ETEAEP) is not funded in advance, nor the state retrospectively guarantees to cover the ETEAEP annual deficits. In order to secure auxiliary pensions, the new insurance system foresees an AAM integrated in the calculation of pensions in combination with an Automatic Balancing Mechanism (ABM). The AAM integrated in pension calculation, following the Notional Defined Contributions (NDC) model, incorporates an increase in life expectancy and "actuarial justice", while the ABM is triggered if the first AAM is not sufficient to ensure a balanced budget. The Unified Auxiliary Insurance Fund (ETEA, before the creation of ETEAEP), as this is defined in its Regulations applies to those who were insured for the first time from January 2001 on the basis of a PAYG System of Defined Contributions with Notional Capitalization.

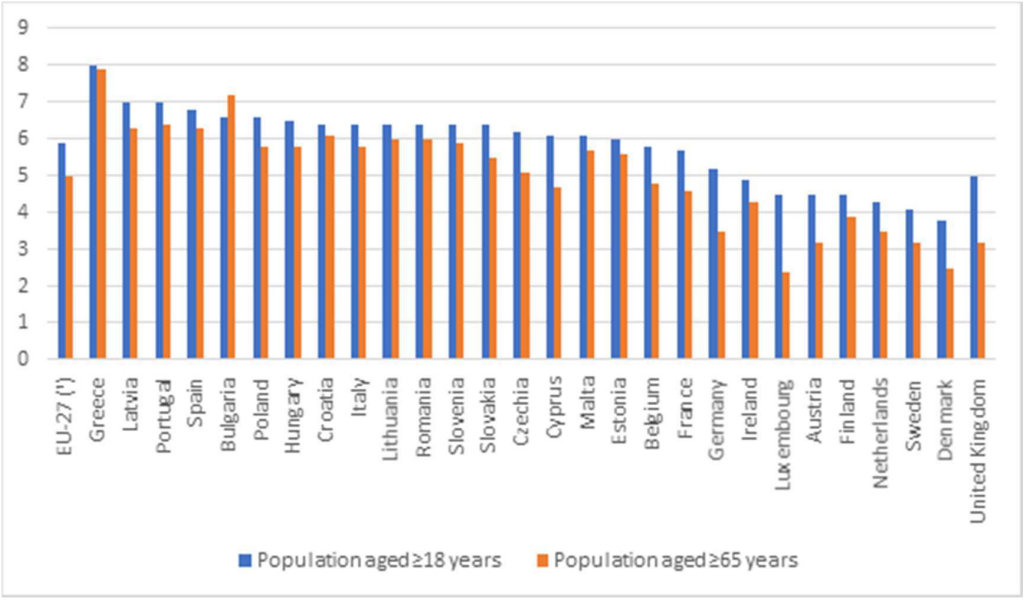
In order to prevent auxiliary pensions from posing a budgetary risk, the zero-deficit clause was stipulated in 2012, as an Automatic Balance Mechanism (ABM). The adjustment of the auxiliary pension was to be implemented after the application of a sustainability coefficient, adjusted on an annual basis according to contributions paid, with a decision of the Minister of Labor and following a proposal by the National Actuarial Authority. In particular, with the creation of the ETEA in 2012, the auxiliary pensions would become a continuously changing amount that depends on the amount of the notional pension capital, that is total contributions, changes in life expectancy, the option of transferring to a widow/widower, fluctuations in GDP and the sustainability factor.

The zero-deficit clause for auxiliary pensions was based on the principle that the sustainability problems of the insurance funds are borne by the insured on an annual basis so as to avoid deficits and burdening the state budget (Angelopoulou, 2016). This method for balancing auxiliary pensions budget had two goals: (a) to establish a pension with an actuarial equal contribution; and (b) to remove the state guarantee for the pension level (Zambelis, 2013). In practice, these two goals cancel each other out, especially given the continuing crisis in the Greek social insurance system. State funding was excluded in advance, without taking into account pension adequacy or other factors and the state is not obliged to take oversee social security precludes an automatic burden on pensioners for the sake of ensuring sustainability anymore. According to the Plenary Decision of the Council of State, was a violation of the state's obligation to guarantee the provision of social security, and implied the suspension of the logic of individual contribution upon which the model of notional capitalization was based (Decision 2287/2015).

The auxiliary pension is theoretically strictly calculated on the basis of the actuarial equity between pensions and contributions and this pension was to be adjusted annually in line with changes in the total contributions, namely the development of employment and wages. This tension between individual contributions and the withdrawal of the state guarantee is an issue

that can arise in the NDC model that has an integrated Automatic Balancing Mechanism (ABM) (Brooks & Weaver, 2003; Gannon et al, 2014). The Greek application of the model diverges from the general characteristics of such a system (Börsch-Supan, 2003; Palmer, 2003) in that there is no reserve fund which in times of crisis can absorb budgetary shocks. In all cases, the integration of an ABM into a pension plan can function effectively in times of unimpeded economic growth. Otherwise, mistrust and lack of confidence is spread along all generations, cultivating a climate that does not favor the implementation of pension reforms.

Graph 2: Concern over not having sufficient income in old-age, by age class, (average, scale of 1-10)



Source: Eurostat, 2016

Consequently, the 2012 reform of auxiliary pensions, which foresaw an integrated AAM (NDC) in combination with an ABM, could have provided an adequately functional pension system that would operate within a stabilized economy and which would not be continuously in deficit, because its annual income would as a rule cover annual payments, and it would be suitably equipped with a reserve fund to cover unforeseen funding shortfalls.

The reform of 2016, which replaced the zero-deficit clause, foresees that the ABM will automatically be triggered if there are shortfalls, but this will prevent any readjustment to pensions. The adjustment to the auxiliary pension is now based on an ABM that excludes any adjustments to the auxiliary pension during the period of increased contributions, namely 2017-2022. In the event of a shortfall, despite increased contributions, the fund's assets will be used, instead of an automatic cutback to benefits.

The ceiling on pension expenditure in correlation with Gross Domestic Product

As part of the fiscal adjustment of the Greek State, a "golden rule" limit to public pensions expenditure was established. Public pension expenditure is believed to be the largest reason for the rise in public debt and annual public deficits (Tinios, 2010). The institutional limits to total public pensions expenditure ensure that the "hand-break" of the Stability Pact can kick in.

As with all forms of AAMs, the triggering of the cap on public pensions expenditure is based on the development (projected development, not real data) of quantitatively countable measures. From January 2017 and every three years, the National Actuarial Authority (NAA) has been obliged to produce actuarial studies, which are ratified by the Economic Policy Committee of the European Union, to enable the continuous monitoring of changes in national pension expenditure. These studies provide economic data on the state support for pensions expenditure and in general monitor the main factors that impact upon the social insurance system. Finally, the anticipated special law aims at setting long-term sustainable pension levels. For this reason, a limit has been placed on expenditure on national, contributory and auxiliary pensions, projected up to the year 2060, with a maximum rise of 2.5% of GDP and with 2009 as the reference year, that is 16% of GDP.

The clause establishing a limit on public pensions expenditure at 16% of GDP means that, even though estimates suggest that by 2040 the number of pensioners will have risen by 70% (OECD, 2019), "in the present and the future, the level of the social efficacy of social insurance will be subject to the goals and substance of fiscal discipline" (Robolis, 2012). This subjection to the needs of the public debt, through successive legislative initiatives, has resulted in a "mechanism for adapting to the orientations and policies of internal devaluation" (Robolis, 2012). The pension expenditure ceiling is a fixed target that is regularly monitored by the Ministry of Labor and the National Actuarial Authority, not only in order to establish that it is being complied with but to ensure that projected pension costs by 2060 are to be kept in check as a precaution. Therefore, this AAM is triggered in advance, relying on projections of pension expenditure and economic growth.

The fiscal golden rule for limiting public pensions expenditure to 16% of GDP is confirmed by linking social insurance with economic productivity and the competitiveness of the economy. On this expenditure ceiling, Stergiou notes the tendency to "seal off the state budget in the face of the escalating social security question", pointing to the depoliticization of policy responses (Stergiou, 2016). Such an institutional limit transfers the risk of unsustainable public budgets to the individuals' risk of inadequate pensions. In the event of an economic downturn, pension expenditure is set to fall. This audit is to be repeated every three years, will be carried out by the National Actuarial Authority, as part of the continuous monitoring of the growth of national pension expenditure. Contrary to all other AAMs of the greek pension system, the golden rule on public pensions is constantly reaffirmed during a decade of crisis. All actuarial studies accompanying pension reforms examine whether the proposed measures are liable for infractions of this golden rule and all reformers accepted the necessity of the public expenditure ceiling.

5. Conclusion

AAMs are designed so as to function effectively during periods of economic stability, not during a recession or economic crisis. Actuarial equity, neutrality and fairness are legitimized, reforms are depoliticized, public budgets are stabilized, workers are motivated to stay longer in the labor market to assure an adequate pension. During a recession or an economic crisis, AAMs are financially insufficient and politically unfit to manage the challenges to a public PAYG pension system.

In Greece, during the period 2010-2020, the choice was made in the midst of an economic and financial crisis to implement a combination of AAMs and an ABM, which resulted in the continuous triggering of automatic mechanisms. The auxiliary pension was diminished year after year and the effective guarantee provided by the state (safeguarding extrinsic factors for the sustainability of the social security system) as well as the formal guarantee of the state to secure the deficits of the Auxiliary Fund were abolished.

The life expectancy AAM was also a relative failure before it had even been implemented. This was legislated for in 2010 and it had already been reversed, in 2012 and 2015. It is expected that it will be triggered in 2021 so as to absorb the increase in life expectancy and, if implemented, will be added to the ad hoc increases in retirement age already being made with derogations from the mechanism. Similarly, the formula and procedure for adjusting main pensions on the basis of GDP and CPI have not been discarded but have been postponed by successive amendments, which defer the implementation of this regulation for the future, when, in other words, it is envisaged or hoped that normality will be restored to some degree. In contrast with these three AAMs, the "fiscal golden rule of pensions" is the only one that has been politically and legally binding.

Table 2. Introduction and resilience of AAMs in Greece

Category of Automatic Adjustment Mechanism	Introduction	Deferral	Weakening	Abolition	Implementation
Main pensions and evolution of GDP/ CPI	L.3863/2010	L.4024/2011; L.4472/2017; L.4583/2018			
Automatic index for life expectancy	L.3863/2010		L.4093/2012; L.4336/2015		
Ceiling of 16% of GDP	L.3863/2010				L.4336/2015; L.4387/2016; L.4670/2020
Zero deficit clause for auxiliary pensions (ABM)	L.4052/2012			L.4387/2016	

Source: Author

Consequently, the introduction of one or a combination of AAMs may not be a simple process, while even more complex is maintaining an AAM and ensuring its proper functioning. The eventual success or failure in the application of an AAM over time can be explained through a number of factors such as the economic conjuncture, political hegemony or institutional framework. Adopting a social security reform becomes the beginning and not the end of a reform (Schoyen & Stamati, 2013). The attempt at the sudden imposition of an AAM during a period of severe economic crisis is a recipe for failure, of which the Greek social security system during the crisis is one typical example. In particular, it can be seen that in periods of the urgent crisis management of a public pension system the priorities of the first level of immediate interventions undermine and prevent the functioning of AAMs. A tension is created among measures of an urgent fiscal nature and methods of long-term, sustainable governance. AAMs are designed to operate in normal economic and fiscal conditions and have a low resilience to crises, as seen in the case of Greece. The first decade of their implementation saw the logic upon which they are based being completely overturned; in other words, they were implemented case-by-case and not automatically triggered. The recent assessment of the National Actuarial Authority (NAA, 2020) has already been overtaken by negative economic forecasts as a result of the measures taken to confront the public health crisis in Greece from the COVID-19 epidemic and it remains to be seen in the period that follows if the fiscal golden rule will be triggered for public pensions and to what extent.

Examining the implementation of AAMs in Greece during a decade of financial crisis, it is worth stating that the underlying principles of AAMs related to demographic trends and actuarial fairness are clearly violated deferring, weakening or postponing their triggering. Unlike the rest AAMs, the expenditure ceiling on public pensions remains so far the only AAM in full operation, emphasising the prevalence of budgetary discipline over pension reform values.

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The impact of digitalization on employment-productivity and the role of Social Protection: Socio-economic costs andlegal options*

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Ο αντίκτυπος της ψηφιοποίησης στην απασχόληση-παραγωγικότητα και ο ρόλος της κοινωνικής προστασίας: Κοινωνικο-οικονομικά κόστη και νομικές επιλογές

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ABSTRACT

The paper begins with a description of digitalization of work. The negative effects are the first to be examined and subsequently the positive effects are presented. Five outcomes with double effects (a negative and a positive one) arise from the analysis of digitalization on employment and productivity. Further, the implications of digital work on social security are illustrated, as well as the legal lacunae at a national, European and international level. Lastly, we conclude to suggestions which could counterbalance the negative effects and enhance the positive ones utilizing techniques from the European legal order.

KEY WORDS: Digitalization, employment, productivity, social security, social protection, costs, legal options

ΠΕΡΙΛΗΨΗ

Το άρθρο εκκινά αποτυπώνοντας την ψηφιοποίηση της εργασίας. Τα αρνητικά αποτελέσματα είναι τα πρώτα που εξετάζονται και στη συνέχεια παρουσιάζονται τα θετικά αποτελέσματα. Πέντε άξονες με αμφίπλευρες συνέπειες (αρνητικές και θετικές) προκύπτουν από την ανάλυση της ψηφιοποίησης στην απασχόληση και την παραγωγικότητα. Επιπλέον, απεικονίζονται οι επιπτώσεις της ψηφιακής εργασίας στην κοινωνική ασφάλιση, καθώς και τα νομικά κενά σε εθνικό, ευρωπαϊκό και διεθνές επίπεδο. Τέλος, καταλήγουμε σε προτάσεις που θα μπορούσαν να αντισταθμίσουν τις αρνητικές επιπτώσεις και να ενισχύσουν τις θετικές με τη χρήση τεχνικών από την ευρωπαϊκή έννομη τάξη.

ΛΕΞΕΙΣ-ΚΛΕΙΔΙΑ: Ψηφιοποίηση, απασχόληση, παραγωγικότητα, κοινωνική ασφάλιση, κοινωνική προστασία, κόστη, νομικές επιλογές

1. Introduction

Social protection systems around the world alongside with the labour markets face challenges due to the insertion of technology in the working lives to an unprecedented extent. Digitalization is perceived to consist of automation and platform economy (Eichhorst and Rinne, 2017: 1). In the world of work, we see an increasing number of self-organized production systems,

"crowdwork", that operate independently with people working from home or from the other side of the globe, delivering in real time (ISSA, 2016: 29). In other words, forms of work in the "gig-economy" include "crowdwork", and "work-on-demand via apps", under which the demand and supply of working activities is matched online or via mobile apps (De Stefano, 2016: 1). Social security and occupational safety and health (OSH) systems developed in response to the risks associated with the societal structures, labour markets, labour relations and production technologies of the "industrial" mid twentieth century (ISSA: 2016, 29). Despite the transformation of socio-economic environment in light of an unprecedented digitalization, social security is expected to (continue to) cover the social risks a human being may face during his/her life. Besides, in a broader sense, social protection promotes fairness, social conscience/responsibility and social justice (Tsetoura: 2015). Social policies based on investments in human and social capital are conducive to higher economic efficiency for they improve productivity and the quality of the labour force (Fouarge: 2003: 37-38). While some emerging work and employment arrangements may provide greater flexibility for workers and employers, they may lead to significant gaps in social protection coverage, at a time when demands on social protection systems are increasing (ISSA: 2016: 29). In any case, the technology's insertion in the working lives and its strong correlation with the new digital economy has both advantages and disadvantages. The recent pandemic highlights the abovementioned more than ever.

2. Methodology

This is a descriptive qualitative analysis based on data from international literature. The employment is approached in-hand with productivity. The latter is a necessary prerequisite of growth. To this end, social protection is essential as well. As we can observe, there are certain negative and positive effects which are not found in literature to be correlated with digitalization of work. Presenting the different kinds of the digitalization's influence, we aim at pointing out the need for the adaptation of the legal framework concluding to certain legal options. The main research question is: which is the impact of digitalization on employment and productivity of the working persons?

The research sub-questions are: which is the role of social protection and which could be the possible legal measures in order to counterbalance the negative effects and to enhance the positive effects?

3. The Impact of Digitalization on employment and productivity

As ISSA notes, the economic and employment outlook based on the likely impacts of digitalization is mixed: Though there may be opportunities for stronger economic growth and improved social wellbeing, other outcomes may be job losses, increasingly fragmented labour markets, the need to adapt labour codes to new forms of work, the further feminization of some economic sectors, and the normalization of "atypical" employment (ISSA: 2016: 30). As presented below, there is situated an interrelationship between certain negative effects, as well as between certain positive effects.

3.1. The negative effects

A. De-standard work/flexibility as insecurity

Many of the new forms of employment are found in non-standard employment (NSE), which describe a range of contractual arrangements that deviate from a standard open-ended, full time, dependent employment relationship, which constitutes the key reference point for most labour and social security legal and policy frameworks (Behrendt and Nguyen/ILO, 2018a: 24). The 'agility' of digitalization relates to workplace, to working hours, and also to the relationship of subordination between employer and employee having an impact on management, as well as on the new forms of non-salaried work, i.e. the self-employed and freelance workers whose numbers are steadily increasing in the United States, the Netherlands, Germany, France, and elsewhere (Degryse, 2016: 17). Working conditions are evolving in many sectors; in some there is already more flexibility in working hours and if imposed, this may be viewed by workers as a source of insecurity (ISSA, 2016: 30). In many cases, non-standard forms of employment can result in precarious or insecure work especially for those in new forms of employment, such as workers on digital platforms (Behrendt and Nguyen/ILO, 2018a: 1). Another potential risk may be how to ensure compliance with OSH standards amongst the increasing number of people working in the digital economy under non-traditional, individualized conditions, as well as new forms of psychosocial pressure and workplace stress; these kinds of stress already contribute to around half of all lost working days in Europe (ISSA, 2016: 30).

B. Automation

Automation comprises the increasing use of robots, machines and algorithms in value chains, which is moreover no longer restricted to simple routine tasks (Eichhorst and Rinne, 2017: 1). The question for labour markets and social security systems is what might be possible if many forms of work have been replaced by automated processes and new technological solutions (ISSA, 2016: 31). The OECD estimates that 14% of jobs are at high risk of automation (OECD, 2019: 13). Frey and Osborne (2013) examined expected impacts of future computerisation on US labour market outcomes, with the primary objective of analysing the number of jobs at risk and the relationship between an occupation's probability of computerisation, wages and educational attainment. According to their estimates, about 47 percent of total US employment is at risk, while they further provide evidence that wages and educational attainment exhibit a strong negative relationship with an occupation's probability of computerisation. Other studies suggest that neither technological progress in general nor digitalization in particular will broadly replace human labor (Eichhorst et al, 2016: 2). In any case, while the future may be uncertain, automation may not always be cost-effective or desirable, it may raise legal and ethical concerns, and it will be affected by people's preferences and policy decisions (OECD, 2019: 13).

C. Inequality

Platform economy refers to an entirely new business model that includes new real and virtual services and, importantly, online outsourcing; in fact, online outsourcing may be viewed as a new form of (digital) Taylorism, and the "crowd" may be viewed as a new player in the labor market (Degryse, 2017: 1). Serious concerns remain with regard to the workers' unclear legal status, lack of social protection coverage and lack of voice and representation, while the increasing prevalence

of work mediated by digital platforms has also brought about challenges in the attainment of decent work, similar to those attached to casual work (Behrendt and Nguyen/ILO, 2018a: 24). The structure of the market of digital platforms has potentially very important implications for pay and working conditions; monopsony[1] in the labour market will tend to lead to relatively lower wages and employ fewer people than in a more competitive labour market (Eurofound, 2017: 21). Despite performing valuable work for many highly successful companies, compensation from crowdwork is often lower than minimum wages, workers must manage unpredictable income streams, and they work without the standard labour protections of an employment relationship (Berg et al/ILO, 2018: 18). Moreover, as far as social security coverage for workers engaged in digital work is financed through their coverage through their main job in the "traditional" economy, this raises concerns about fair competition and equity regarding the financing of social protection systems (Behrendt and Nguyen/ILO, 2018a: 24). Further, there is also the category of bloggers meaning those who earn income from the advertisements of products/services on their sites from the respective companies (and not those having a site as a personal diary). Yet, these persons may not be considered as working, neither as self-employed, neither as having an e-shop, despite the fact that blogging may be their main/only source of income. The number of bloggers worldwide is increasing, but there is not any extensive study dealing with this new form of employment.

D. Work-personal life imbalance

The global outsourcing of work through platforms has led to the development of a 24-hour economy; this process has stretched the number of consecutive hours of work both paid and unpaid – often eroding the fixed boundaries between home and work (Berg et al/ILO, 2018: 70). As the findings of the relevant survey indicate, due to low pay and lack of social protection, workers had to constantly look for work, and adapt to the temporal distribution of jobs depending upon their location (Rani and Furrer, 2019). This often meant a high intensity of work, as they worked long hours, especially during evenings and nights, making flexibility and work life balance quite illusory (Behrendt et al/ISSA, 2019). According to the ILO survey (Berg et al, 2018), on average, in a typical week workers spent 24.5 hours doing crowdwork, of which 18.6 hours were paid work and 6.2 hours unpaid (e.g. looking for tasks, completing qualification tests): as a result, for every hour spent on paid work, roughly one-third (20 minutes) of additional time is spent on searching for tasks. The need to constantly look for work, the idiosyncrasies of task posting, and differences in time zones meant that many workers worked long hours and atypical hours, while a large proportion of workers worked during the night (10 p.m. to 5 a.m.; 43 per cent) and during the evening (6 p.m. to 10 p.m.; 68 per cent), either in response to task availability or because of other commitments (Berg et al/ILO, 2018: 67). Furthermore, another parameter should be also taken into account, that is, the non recognition of their work within their environment. Hence, their digital work is "invisible" and at the same time it might get difficult to fulfill their tasks if they are not treated as working just because they are at their home.

E. Cost – inefficiency: Gaps of social protection and "digital syndromes"

Firstly, the cost becoming obvious already is that caused by the "free riding" digital economy. Greater job and income insecurity and low pay increase the demand for social protection and put stronger pressures on both social insurance and social assistance schemes (Behrendt and Nguyen/ILO, 2018a: 2). In some cases, workers combine platform work with salaried employ-

ment, which means that they may enjoy some social security coverage, albeit often incomplete (Behrendt and Nguyen/ILO, 2018a: 25). This also raises concerns about the "new" economy free riding with regard to the financing of social security at the expense of the "traditional" economy, as well as the equitable and sustainable financing of social protection systems (Behrendt et al/ISSA, 2019). However, the long-term cost should be also taken into account both in social and economic terms.

The cost at issue has to do with the extensive use of the screens for the purposes of work. According to the International Classification of Diseases (ICD-10) of the World Health Organization (WHO), visual fatigue - also called visual strain - is classified as a subjective visual disturbance (H53.1), manifested by a degree of visual discomfort typically occurring after some kind of prolonged visual activity, and characterized by fatigue, pain around the eyes, blurred vision or headache (Benedetto et al, 2013: 2). In this framework, the need to empirically evaluate visual fatigue on e-readers and paper is getting more and more important. However, only few studies have focused on visual fatigue (Benedetto et al, 2013: 2). Computer vision syndrome, also known as digital eye strain, is the combination of eye and vision problems associated with the use of computers (including desktop, laptop and tablets) and other electronic displays (eg smartphones and electronic reading devices) (Rosenfield, 2016: 1). In fact, there continues to be growing evidence in the literature that dry eye disease negatively impacts quality of life and visual function across more domains than healthcare providers may realize (physical health, psychological well-being, level of independence, environmental impact) (Guo and Akpek, 2020). In today's world, the viewing of digital screens for both vocational and avocational activities is virtually universal (Rosenfield, 2016: 1).

Digital eye strain has been shown to have a significant impact on both visual comfort and occupational productivity, since around 40% of adults and up to 80% of teenagers may experience significant visual symptoms (principally eye strain, tired and dry eyes), both during and immediately after viewing electronic displays (Rosenfield, 2016: 1). Recent published works support dry eye disease to decrease productivity (Yamada et al., 2012, Nichols et al., 2016, Craig et al., 2017, Guo and Akpek, 2020). More specifically, recent studies found dry eye to reduce workplace and nonjob related performances and create substantial loss to work industry (Yamada et al., 2012, Nichols et al., 2016, Craig et al., 2017, Guo and Akpek, 2020). The cost that the social protection systems and health care will have to bear has been neglected, as well as how the massive labour force exhaustion due to their exposure to the screens will affect productivity and growth overall. Nowadays, this is more relevant than ever because of the corona pandemic and the massive use of screens in order to avoid physical presence and meetings.

3.2. The positive effects

A. De-standard work/flexibility as freedom

One of the positive benefits of crowdwork, noted by many of the ILO survey respondents, is the ability to set one's schedule, as well as work from home or from another location of the worker's choice (Berg et al./ILO, 2018: 67). Crowdwork can provide a high level of flexibility for workers in terms of the selection of tasks, how much one works, the place of work and the organization of one's work and allows those who prefer to work from home the ability to do so, whether for health reasons, domestic responsibilities or simply a preference to be in one's own home (Berg et al./ILO, 2018: 67). The latter may refer to stay-at-home women for the purposes of taking

care of children or elderly relatives and is also related to equality issues presented below. The flexibility element of remote work is already utilized by large companies giving the choice to their employees to work from home (known as home office). Hence, there is a combination of traditional workplace with the digital opportunities such as working from home. The ability of hiring skilled staff from all over the world could also benefit companies opting for the remote work. According to FlexJobs' (2017) sixth annual survey of more than 5,500 respondents, 66% of professionals think they would be more productive working remotely than in a traditional office (Reynolds, 2017).

However, in our opinion, the most important reason why the flexibility that the digital work provides has a positive effect is the possibility of work for certain categories beginning with the disabled persons. As a matter of fact, there are not surveys examining the impact of digitalization of work with regard to persons with disabilities and their inclusion in labor market or to which extent the digital work promotes their productivity. There are significant numbers of adults with physical and mental disabilities who have a shortage of opportunities for economic participation. Within the context of the ILO synthesis of national dialogues, some countries, such as Austria, Australia and Germany, expressed the view that technological innovations will play a substantive role in facilitating the inclusion of workers with disabilities at work (ILO, 2017b: 30). Last but not least, in times of a pandemic such as COVID-19, the continuation of work would be impossible without the digital means. On the contrary, a global financial/social breakdown would be the case without digitalized work. Namely, the productivity has been kept on a sufficient level due to digitalization and its extensive use in the various countries around the world not only during the lockdown but also afterwards.

B. Automation

Related to this component is the more general perspective on the future of work in light of technology-induced productivity growth, which focuses in particular on its potential impacts on aggregate (and occupation-specific) employment (Eichhorst and Rinne, 2017). Moreover, there is an expected reduction in work-related accidents and diseases, as it may become more possible for dangerous work tasks to be automated, however, greater reliance on robotics can only remain positive if this continues to be underpinned by strong regulations to protect workers and prevent workplace accidents and injuries (ISSA, 2016: 30). This is also the case about algorithms on the basis of which many digital tasks are fulfilled.

C. Equality

One of the benefits of crowdwork is that it allows workers to work from home and thus provides opportunities to workers who would otherwise not have access to paid work; this is particularly true of women, who, throughout the world, overwhelmingly shoulder the burden of care responsibilities (Berg et al./ILO, 2018: 69). According to the recent study of ILO (Berg et al. 2018), women with small children noted in the qualitative responses as well as in follow-up interviews that they preferred crowdwork as it allowed them to engage in some form of work and earn some income and at the same time take care of children or elderly relatives and perform housework. In addition, in countries where family policies are almost absent (the US) or where the provision of public childcare services is limited (Italy and the US), a large share of women still withdraw from the labor market taking into account the high cost of child care (Anxo et al., 2011: 90).

For women workers, working from home not only reinforces gender roles, alienating them from social relations, but it can also exacerbate their income insecurity as they lack social protection coverage and earn low incomes (Behrendt et al/ISSA, 2019). Moreover, emphasis should be also given on the fact that everyone has equal access to jobs due to digitalization. Besides the women with care responsibilities, the disabled persons can possibly work like everyone else, while otherwise they could not have access to any work at all. There should be noted that digital work offers opportunities of labour and social/economic participation not only to persons with restricted mobility but also to deaf or blind persons (e.g. google voice).

D. Work- personal life balance

This effect is associated with the abovementioned. As already pointed out, digital platforms have the potential to provide employment and income generation opportunities with a high degree of flexibility, for instance for persons with limited mobility or care responsibilities (Behrendt et al/ ISSA, 2019). But this is not only the case. The recent ILO/Gallup survey (2017) found that balancing work and family is the biggest challenge for women in developed and emerging countries, and ranked as the second biggest challenge in developing countries. According to surveys of FlexJobs, since 2013, work-life balance (78%), family (49%), time savings (46%), and commute stress (45%) have been the top four reported reasons people seek flexible work (Reynolds, 2017). Despite much progress in reducing working hours in the past century, working time remains a major challenge for workers in maintaining a healthy and balanced family life, especially in developing countries where working hours continue to be typically very long, often exceeding the weekly threshold of 48 hours specified in the ILO Hours of Work (Industry) Convention, 1919 (No. 1) and this is why in developed countries, recent years have seen significant slowdowns in working-hour reduction (ILO, 2017c: 20).

E. Cost-efficiency: Preventing anti-social behavior - future costs

This effect is particularly correlated with the possibility of parents to stay at home to raise their children and especially mothers while working digitally. As already mentioned above, according to the relevant ILO survey many mothers preferred crowdwork so as to be engaged to some form of work and at the same time to take care of their families. Noteworthy, caring directly for family members and others, as well as other activities associated with home-based work ensure the maintenance and reproduction of people and societies (ILO, 2017c: 18). This seems to be extremely important for the "adult-to-be" children. Attachment insecurity is a significant predictor of public cost in at-risk youth, even after accounting for covariates (Bachmann et al., 2019: 1). Since adolescent attachment security is influenced by caregiving quality earlier in childhood, the findings of Bachmann et al. (2019) add support to the public health case for early parenting interventions to improve child outcomes and reduce their cost on society. The study of Bachmann et al. (2019) is the first study to investigate the financial costs associated with attachment security, a key marker of caregiving quality associated with a wide range of social, emotional and behavioural outcomes in children and adolescents. The results showed that in a key group of young people, those at risk of poor outcomes due to moderate or severe early-onset antisocial behaviour, insecure attachment was associated with significantly greater cost, both overall and across individual domains such as education, social care and health (Bachmann et al., 2019: 5). Importantly, costs were greater even after controlling for multiple other risk factors known

to be associated with increased health costs and service utilisation, including socioeconomic background, child age, gender and IQ, and severity of antisocial behaviour -most of which were independently associated with increased economic burden (Bachmann et al., 2019: 6).

4. Critical comments

Taking into account the abovementioned, we conclude that either we are discussing about the negative effects or the positive effects the variables are the same. Hence, these five outcomes are those arising from the analysis of digitalization on employment and productivity: a) the de-standardization/flexibility of work, b) the automation c) the work-personal life balance d) the equality and e) cost-efficiency. The latter can become obvious in our table below. After clarifying the effects of digitalization, we focus on how the negative effects will be counterbalanced and the positive effects will be promoted in the means of law by examining the legal challenges and presenting the legal options.

EFFECTS OF DIGITALIZATION	(-)	(+)
De-standard work/flexibility	Insecurity Informality	Freedom Remote workers by choice or necessity - The pandemic factor
Automation	Job loss	Protection from professional diseases/accidents
Work- personal life balance	High intensity of work Inability to plan the tasks	Ability to work and offer to family at the same time
Equality	Unclear legal status Lack of representation	Equal access for all
Cost-efficiency	Free-riding economy Digital exhaustion	Preventing anti-social behavior of "adults-to-be"

5. Legal implications and lacunae

Technological change and digitalization are creating new forms of invisible work, in the sense that the virtual/digital workers have no dedicated location and their employment relationship is often not recognized (ILO, 2017c: 18). The extent to which virtual labour will come to represent a significant portion of the global labour force remains unclear; whether these forms of work will ultimately fall within the ambit of the employment relationship, become new types of informality or fail to fall within existing regulatory frameworks also remains uncertain (ILO, 2017c: 18). Much of the work on digital platforms is part-time, temporary, often casual, and the boundaries between genuine self-employment and disguised employment relationships tend to be blurred (Behrendt and Nguyen/ILO, 2018a: 24).Workers in the gig economy are generally classified as independent contractors and, as such, they have no access to the vast bulk of employment protection (De Stefano/ILO, 2016: 8). Even if they were classified as employees, however, the intermittent nature of their activity could be an obstacle to accede to important employment

or social rights, such as maternity leave, paid holidays, full unemployment benefits, when these rights are dependent upon a minimum length of service: this risk they share with temporary and casual workers in several jurisdictions (De Stefano/ILO, 2016: 8).

Existing labour and social security laws are often not sufficiently specific with regard to the coverage of workers on digital platforms, and are often not adequately enforced to ensure compliance, especially on crowdwork platforms, where tasks are divided into micro-gigs and delegated to a large pool of virtual workers, workers tend to execute multiple jobs for multiple "employers" in a single day (Behrendt and Nguyen/ILO, 2018a: 24). Particularly problematic is that companies can 'hire' people from all countries - including developing and emerging countries - at the lowest wages, without carrying any social obligations and without any transaction costs (Chesalina, 2018: 17). From the point of view of social law, the central challenges of the platform economy are the lack of social security for digital workers as well as the fiscal sustainability of the social security systems (Chesalina, 2018: 18). Further, the latter has also to do with the question which country's legislation will be applicable when indifferent countries mediated through digital platforms. The International and European agreements should include provisions regarding the "virtual workers". The relevant EU legal instrument, the EU Regulation Coordination on Social Security Systems could serve as a solution in the area of Europe and maybe as an example worldwide as shown below. In this context, the discussion about residence criterion (lex loci domicilii) or the employment criterion (lex loci laboris) becomes also relevant (Tsetoura 2017).

6. Legal options

The impact of technology on the world of work will depend on how gains are distributed, given the widening income inequality among countries and regions, and whether the transition creates decent and quality work (ILO 2017c: 10). At an international level, Enzo (2018) suggests 'digital social security'. It would automatically pay a fixed percentage of the agreed salary into the personal DSS account of the platform worker (either on top of the agreed salary, or as a deduction, or as a mixture of both) and this simple pay-as-you-earn mechanism would be the only element to be included into the different platforms (Enzo/ILO, 2018: 3). The accrued amounts would be transferred once a month from the DSS accounts to the relevant national social security systems (according to the place of residence, or nationality, if desired) and there, all further steps could be handled within existing structures (Enzo/ILO, 2018: 3).

There are also suggestions of making entitlements portable in order to support mobility across jobs and forms of employment (OECD, 2018: 35) or the introduction of a third (intermediate) group between employees and independent contractors, which could help to find the right balance between universalism and selectivity and protect workers who share only some of the characteristics of employees by bringing them into the scope of some labour and employment laws (Davidov, 2017: 8). At the same time, the experience of some countries (e. g. Italy) shows that the introduction of an intermediary category will rather contribute to the circumvention of the existing 'employee' category and become an obstacle for (digital) workers to achieve appropriate labour and social law protection (Cherry and Aloisi, 2017: 675) than to tailor-made solutions and more precise regulations (Chesalina, 2018: 21). Also from the German perspective the inclusion of digital workers into social/pension insurance risks a worsening of the situation of the self-employed digital workers with a low income if the contributions has to be paid out of these low incomes, while, on the other hand, their chances to receive a pension

above the social welfare level are low (Chesalina, 2018: 25). Notwithstanding the above, any national legal solution reaches its limits when platform operaȠtors or their clients are based abroad and this is why it would be desirable to create framework conditions for the payment of social contributions at least at the European level (Chesalina, 2018: 25).

The relevant EU legal instrument which could offer solutions is the EU Regulation Coordination on Social Security Systems. In fact, Coordination Regulation provides for the electronic exchange of social security information (EESSI). Is it possible for new "digital provisions" to be included? The existing provisions of Regulation 883/2004[2] could adapt in order to be extended to virtual workers. EU Coordination Regulation applies if there is a cross-border element between at least two member states. For digital workers there is not a movement/mobility geographically, but there is a "virtual mobility". For example, a person is resident of France and pursues an activity digitally for a company in Sweden. According to the present rules of Regulation 883/2004 (Article 11), this person is subject to the state of activity. Is the activity pursued on the state where the person lives or is it considered to be pursued on the state where the company is? Then the question goes to the consideration of this person working as an employed or self-employed. The changes in the provisions of the old Regulation 1408/71 being supported by the recent case-law focus more on the concept of the place of activity rather than its classification as employed or self-employed (Tsetoura, 2014). Apart from the traditional workplace, a place of activity should be considered the digital workplace. In the same example if the person pursues activities digitally for other companies as well, located in various member states, to which state's legislation will the person at issue be subject? Article 13 Reg. 883/2004 (pursuit of activities in two or more member states) could be helpful in this respect.

However, as long as the digital activity is not clarified in national laws as an activity of an employed or a self-employed so as to apply the existing rules of Reg. 883/04 on determination of applicable legislation, a different approach could be made. A clear-cut criterion to be used within but also outside the European legal order is the origin of the main source of income. Namely, if a person earns his/her income from the digital activity pursued for a company, the place of business of which is on the state A, the person at issue should be subject to the legislation of state A for the purposes of social security law. If a person pursues activity digitally for companies, the places of business of which are on various member states, the person should be subject to the legislation of the state where the company paying the person the largest amount of his/her income is located. In case the person has another source of income from an activity non digital, which is combined with a digital activity, there are many complications.

Yet, the criterion of the main source's income origin could be again applied in order to answer on the basis of which activity the person should be insured, the digital or the non digital. Between a digital activity and a non digital activity, to be an activity the predominant, the person should earn from the activity at issue more than 60% of his/her income. For example, if a person living in France and working there as a self-employed (non digital activity gaining 40% of the income) pursues digital activity for a company/client on Belgium (gaining 60% of the income), the applicable legislation will be the one of Belgium on the basis of the digital activity as the main source of income. It is interesting that the result would be the same if the digital activity was considered as an activity of an employed person according to Article 13, par. 3 Reg. 883/04. Article 1 (a) Reg. 883/04 provides: 'activity as an employed person' means any activity or equivalent situation treated as such for the purposes of the social security legislation of the Member State in which such activity or equivalent situation exists. If in the foregoing example the Belgian social law considered digital activity as an equivalent situation according to Article1 (a) Reg. 883/04.

Further, other suggestions of legal measures firstly at a national level could be the regulation of digital working time, the delimitation of the legal status of bloggers, the creation of a digital workers register, the granting of incentives to employers (tax exemptions) to hire and register special categories of working persons digitally (parents/mothers, disabled) and health protection from computer syndrome for those working either in the traditional workplace or in a digital platform exclusively, by granting extra vacation days for "eyes rest". The latter could also create jobs and maintain the productivity of the working persons. Lastly, a technique from Greece is referred as it could be used with regard to digital work i.e. the "ergosimo" (labour-ticket)[3].The labour ticket "ergosimo" is nominally transferred by the employer to the employees as payment for the remuneration of the work and then paid by the dispensers (banks and post offices) by payment of the corresponding amount after the relevant contributions have been withheld. Withholding insurance contributions and the net amount are written on the multipurpose check. From this multifaceted check one section is kept by the paying agent and the other section is guarded by the employer. At the end of each year, the social security institution sends an annual aggregated statement to the employer and the employee. The technique at issue was introduced in order to deal with undeclared work especially in the case of micro-tasks (Stergiou 2014: 454). In our case, an e-ergosimo could be provided.

7. Conclusion

Within this paper, we analyzed the double effects of digitalization on employment and productivity and the role of social protection. These effects are also important in view of the current times of corona. The recent pandemic brings into light the positive opportunities of digitalized work, but at the same time the negative effects coming alongside with the possibilities. This is why we think that the effective regulation of both the negative and positive outcomes plays a crucial role. We discussed how to counterbalance the negative effects and to enhance the positive ones, examining the legal challenges and presenting suggestions from literature. Then we particularly focused on the EU legal instrument on coordination of social security which can be adapted and offer solutions. Lastly, we presented certain legal measures placing a digitally purposeful regulatory framework. The regulation of the status of all the factors involved in the digital workplace is necessary at a national, European and international level.

Notes

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1. Monopsony is 'a situation in which the entire market demand for a product or service consists of only one buyer' (Collins Dictionary).
2. European Parliament and Council Regulation (EC) 883/2004 on coordination of social security systems, OJ L166/1.
3. "Ergosimo" was introduced regarding social security issues of home-based staff providing paid work or services, paid hourly or daily, at regular or non-regular intervals, either to one or more employers, for the same pay period covered by the IKA-ETAM insurance (Article 20 Law 3863/2010). Gradually it has been expanded to various categories of working persons (article 74 Law 4144/13).

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Considerations on national identity in the Greek education policy: historic and religious dimensions

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Προβληματισμοί για την εθνική ταυτότητα στην ελληνική εκπαιδευτική πολιτική: Ιστορικές και θρησκευτικές διαστάσεις

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ABSTRACT

This paper is concerned with the instruction of History and Religious Education in the Greek education system. Concentration is placed on the complex national and religious narrative about the school dynamics related to the values and religious-national patterns transfer. The resistant traditional policy is portrayed and, in terms of semantics, it focuses on nation-centralization through political and spiritual symbols. They confine, explicitly or implicitly, the approach towards the intercultural concept which forms the prerequisite of the transformation that makes the concept of "national" meaningful through the promotion of completeness and unification principles as factors towards the formation of citizens capable of being incorporated in the expanded political and cultural environments.

KEY WORDS: National identity, Greek education policy, historic dimensions, Religious Education

ΠΕΡΙΛΗΨΗ

Στο άρθρο διερευνάται η εκπαιδευτική πολιτική για την Ιστορία και τα Θρησκευτικά στο ελληνικό εκπαιδευτικό σύστημα με επικέντρωση στη σύνθετη εθνική και θρησκευτική αφήγηση για το ρόλο και τη δυναμική του σχολείου στη μεταβίβαση αξιών και θρησκευτικών-εθνικών προτύπων. Παρουσιάζονται οι αντιστάσεις μιας παραδοσιακής πολιτικής, που σημειολογικά εστιάζεται στον εθνοκεντρισμό, μέσα από πολιτικά και πνευματικά σύμβολα, που ρητά ή υπόρρητα απομειώνουν προσεγγίσεις για μια διαπολιτισμική προσέγγιση, που προϋποθέτει μετασχηματισμό της νοηματοδότησης του «εθνικού» μέσω της προώθησης αρχών ολοκλήρωσης και ενοποίησης ως συντελεστών για τη διαμόρφωση πολιτών, που θα μπορούν να εντάσσονται σε διευρυμένα πολιτικά και πολιτισμικά περιβάλλοντα.

ΛΕΞΕΙΣ-ΚΛΕΙΔΙΑ: Εθνική ταυτότητα, Ελλάδα, Εκπαιδευτική πολιτική, Ιστορία, Θρησκευτικά

1. From the familiar national content to the unfamiliar globalized discourse: transition to the educational environment

In these days, the globalization[1] effects are revisited in the sense that the new perspective is actually the consideration on the structural relation of states, the position of power or dependence and even issues of independent state organization or autonomy in juxtaposition to policies of state integration into international organizations[2] resulting in a common policy and their limited or non-differentiated distinctiveness.

Within the context of revisiting the concept nation-state, the concepts of time and space related to the meaningfulness of nation-state are annulled due to the expanded globalized community. On the other hand, the definition of the citizen is particularly important at a political level, as it provides conceptual codes about it. In traditional terms, the concepts of historical continuity and geographic demarcation could define the concept of citizen which, according to the above, could be comprehensible while differentiating individuals and states.

Therefore, the question could be posed differently with regard to the question of modernization posed by political authorities and it could be like "How do we define the citizen within the nation-state and how can we define the concept of citizen beyond the nation-state?". After all, the globalized conditions bring back the question about those elements that define the citizen through ethnoscapes, technoscapes, ideoscapes and expanded "scapes") (Appandurai, 1997)[3] conducive to a fluid globalized condition (global ethnoscapes); a post-modern, incoherent paradigm which brings together different fields and forms a dynamics completely unfamiliar to the traditional nation-state. Throughout this transitional period, the formation of an education policy to renegotiate two general fields of: a) the globalized and b) the nation-state[4] is particularly important.

They are actually choices that direct and regulate the principles of an education policy which can define an educational system and a model of individuals' socialization and politicalization based on a selected and determined teaching content that addresses the specific cognitive units. In these texts there is a repetitive perspective, a process in which the teacher's oral discourse, the written text and the use of technology create an environment in which the national awareness is shaped. Content analysis of the general aims and objectives of education, as described in the Constitution and individual bulletins[5], could showcase the distinctive features of the Greek education policy which, despite the differentiations derived from different governments and political choices, focuses on the concepts of moral and the Greek citizen.

The concept of moral refers to a religious conceptualization in which the moral is identical to the divine according to the Orthodox Christian tradition. Each state's religious tradition is crucial to identity shaping (Iglehart & Baker, 2000) contrary to different cultures and religious traditions (Huntington, 1996). As regards Greece, in particular, the religious tradition develops an environment in which patriotism is legalized and both religion[6] and country co-build a framework of reference for the Greek culture, while they promote its differentiation from the other countries. At the same time, discriminations are legalized, through the circumscription of a "community – we" contrary to a broader differentiated space including the "others", Turks and Albanians in particular. Therefore, the question is "which is the role of migrant students of the Greek multicultural society within such an educational model?" It is well-understood that the concepts of inclusion or exclusion[7] exist within certain limits.

2. Definition and functionality of religion to conceptualize the nation-state contrary to globalized circumscriptions

An interesting religion-related contradiction is that all religious doctrines legalize forms of inequality and anti-democratic behaviors despite their reference to principles of equality. Generally, in religious terms, focus is placed on the future and the after-death bliss, while individuals are marginalized as socially and politically inert entities and adopt a passive political attitude and the practice of asceticism (Haynes, 2006). In the Greek case, the "national narrative" includes the "religious" one, too. This can be seen in the highlighted role of ecclesiastical carriers in Modern Greek History. The version of a Greek nation, in the form a narrative in the Modern Greek History, coincides with a broader frame which also includes Language, Literature and religion. The association of religion with the revolution against the Turks in 1821 is a typical example. The historical narrative depicted the church leaders at the forefront of the revolution. Thus, the highly ranked clergy was incorporated in the narrative of the Greek Revolution fighting at the forefront against the Turks. During the celebration of the 200th Anniversary from the Greek Revolution, a differentiated historical paradigm is interestingly developed. It presents the real facts about the historic role of leaders by eliminating religious "myths".

Therefore, the moral personality is believed to be shaped through the subject of Religious Education both in Primary and Secondary Education with a particular learning content. Interestingly enough, teaching a doctrine seems to correlate religion, as a values system, with politics, in the way a religious culture can shape spheres of influence and normative frames (Crawford, 2008; Stark & Bainbridge, 1985) that define tradition as an institution, form and content of education.

Based on a semiotic analysis[8], the importance of Religious Education is evident in its ranking in the first place in the Curriculum and student term report, being referred to as "Orthodox Christian Education". Emphasizing this subject to serve the general educational aim of building "useful moral" is associated with the broader connection between the Greek state and church[9]. Besides, the Ministry in charge of developing and implementing the education policy is also characteristically called Ministry of Religious Affairs[10], a choice distinctive of the pivotal role of religious authority on developing the education policy[11]. According to the History of Education, it can be seen that there have been interventions of religious authority in the areas of language, student appearance, textbook content, structure and teacher selection. The practice of draft evaluation and corresponding intervention in shaping the educational legislation is very common.

The degree of intervention depends on the individual relation between each government and the church. However, the notion that a more conservative government has closer relations with the religious authority rather than a more leftish government should not be generalized. Such interpretations are more disorienting than showcasing the significance of people and situations in politics. Given that one part refers to the subject of Religious Education, it is interesting that the other part refers to the establishment of the educational space – environment. This is reinforced through symbols that typically associate religion, education, and the student, in the classroom micro-world. Such performative symbols can be religious pictures, a cross, paintings or texts with religious content. At the same time, other rituals are performed by the entire school population, namely the morning pray, the sanctification and religious holidays that characteristically identify the educational process with acknowledging religion and its legalization in the school community, students in particular. This is the social function of the ritual in which an

arbitrary fact can be legalized or established and be eventually defined as legal. The major goal of the ritual is to unify groups of people, while discriminating the others, a "secret group" which helps define the "dominant" group[12].

3. History as a cognitive module in the education system. Conceptualization and content

Arguably, one dimension is linked to the relation between school and religion, a specific doctrine, while the other one is associated with History. The Greek citizen is conceptualized as someone who is cognizant of the Greek History in which time and space define the state, a theoretically harmonious co-existence of individuals as a non-differentiated whole. This has contributed to the continuation of the concept of "country" in relation to broader classifications about other states or populations. This comparison emphasizes the distinctive features of the Greek citizen such as race and the timeline between past and present, both characteristic of superiority. The History taught both in Primary and Secondary Education mainly focuses on the special role of the Greek state throughout different historic periods. A general interpretation could highlight an undifferentiated mass that conceals class choices, the feminist dimension and the development of a globalized society and culture.

The symbolic reference, as foretold, is processed in the same way in the subject of History through the flag, portraits of Greek heroes, historic texts and participation in national celebrations. Hero portraits of the Greek Revolution of 1821 also include religious leaders. This enhanced the perception that during important liberating struggles the religious leadership was standing by the side or inspired the politicians. Thus, within the school environment the political military role of the leaders is identified with the word of the ecclesiastical leadership. Freedom, as a gift from God, is emphasized along with the performative work of the religious leaders. In the same vein, the subject of Literature is strongly associated with historic and religious principles, a fact proved with the particular selection of texts. In this respect, the education policy focuses on two pillars: the moral is identified with religion and the national with history.

The selection of the content of History focuses on historic people and events on a national and international level. Thus, the content to be shaped can be the outcome of choices about certain information or situations documented as historic memory. On the contrary, other information should be silenced, deleted, and forgotten. Based on this approach, History illustrates the dominant ideology of each time period. It is a combination of institutions and texts that work as "paradigms"[13], such as inequality and broader interpretations on the definition of nation, thus, establishing authoritative roles tied to specific social classes (Liakos, 2005). Therefore, changing the content of History leads to different readings and interpretations of historic facts that highlight different ideological patterns. One could refer to the construction of meaning, according to which social relations, roles and identities are constructed (Mayer, 2004b).

4. Educational circumscriptions and functional definitions of the Greek education system

Based on a limited number of changes, the education system remains unaltered[14] and stable in terms of general aims although the differentiated globalized systems or the socio-political conditions form different environments. Ever since 1990, Greece has been turned into a multicultural society[15] with large numbers of migrants whose permanent residence signifies their decision to be included in the Greek society, with rights that derived from the concept of the citizen beyond their identification with country and religion.

Theoretically speaking, the Greek education policy should undergo a transitional phase of educational reformation so as to include new categories of citizens, while adopting new educational models stemming from the relation, as a member-state, to the European Union and taking into consideration the open, economic, social, political and globalized environment. In other words, the national education system could confront the globalized needs, definitions or imperatives.

It seems that we are in front of a situation of studying differentiated educational proposals since the national-religious educational model is not efficient in the sense that it isolates and limits the concept and content of the citizen. The question is how an education policy can combine the globalized demands with the national definitions. To this end, the argumentation against people who tend to promote national and religious characteristics, either in political or religious terms, is very important. As foretold, any resistance is not merely defined in terms of a right or left policy. It is evident that the extreme right policy focuses on the historical and religious tradition, whereas some left policies utilize these two pillars to emphasize peoples' resistance against globalization as another form of capitalism.

It can be said that the Greek education system is attached to the values system, as this is expressed in a national and religious dimension. The new reforms seem to respect the personality of others – especially through other subjects like Citizenship Education[16] – and educational choices aligned with the European education policy with emphasis on the market; yet, without overriding the national and religious character of education.

5. The paradigm of the policy of intentions in Religious Education and History

It is useful to explore recent efforts of educational reforms that include imposed principles and standpoints tied to more general European goals to organize societies with emphasized individual and social rights in which the individual is educated and any national or religious symbols are associated with a policy that reinforces inequalities, discriminations and marginalization of people.

On the basis of religious freedom[17] and respect to the rights of minorities, a bulletin has been issued about the exemption of students of different religions from the subject of Religious Education[18]. As regards the instruction of this subject, detailed bulletins have been issued[19] to give students the right to exemption. It is noteworthy that there have been considerations about the content of the subject as well.

This was the first time to put at the forefront issues of a flexible content so that this subject is not a form of indoctrination, but rather highlight the cultural and political elements of Orthodoxy as well as issues about environmental advocacy, creation and universal unity (Konidaris, 2008). This perspective concentrates on the continuation of this subject in the sense of teaching themes in line with the orthodox Christian doctrine. This is actually a skillful inner restructuring of the content towards mitigating demands to completely exclude this subject from the Curriculum.

At the same time, three issues have been presented. The first one is about giving the right to adolescents to choose cognitive subjects. The second one refers to a more general framework of state – church relations. The third one is related to the question of what will happen with human rights in case the History taught is considered nationalistic, as some modules are rather offensive against the rights of migrant communities.

The questions whether students have utilized the above rights or whether they are stigmatized if they do not choose this subject are not part of this study. Yet, it can be argued that there is a low percentage of students who do not attend Religious Education, roughly more than the previous number of students who did not attend it because of their Catholic or Jehovah background[20]. It is noteworthy that a large number of migrants of different religions did not choose to differentiate from the majority of the Greek orthodox students. Thus, the question is which structures the migrants belong to and what their possibilities are. Perhaps their differentiation in this field could generate further social rejection and marginalization.

The issue of choice is more complex since choosing a religious doctrine or not is tied to social and educational possibilities of the existing system. In countries with intense religious awareness the discourse has characteristically focused on a number of provisions[21] about the instruction of this subject without essential reference to school environment, that is symbols perceived rather as cultural tradition instead of a religious one. This way, the legislation could skillfully be annulled. It is noteworthy to refer to the unifying agent, the process of removing the ideological content of national and religious symbols and their turning into elements of tradition. One could expect that the education policy, at least for Religious Education, would be reshaped during the socialist government. However, it proved that the bonds between state and church are so powerful that they hinder the disengagement of education from ecclesiastical imperatives[22]. This way, they break the principles of the Constitution and the citizens' rights in the way they are stated in the globalized culture of rights[23].

The same applies to History textbooks. This is not something new, as the educational history has undergone a number of reforms or re-adaptations aimed to highlight, throughout different time periods, a form of History intertwining the specific context[24]. According to the degree of significance, the national model affected the writing of History textbooks. Some time periods are particularly interesting because intellectuals, with a wide range of studies, suggest the History textbooks be written in the form of analyzing the global situations. This way the national and the global can be correlated to articulate broader ideological standpoints[25].

The effort to write the History textbook of the 6th grade[26] of Primary Education is a typical case study. A model of reading History without elements that ignite the contrast between enemies – allies[27], through the limited narrative of facts conducive to emotional responses. Although this effort did not result in a school textbook[28], it paved the way to revisit the writing of History. The conservative government along with the reactions from the broader political space[29] and ecclesiastical authorities support our argumentation about the complexity of this issue, apparently interpreted through typical political identifications and circumscriptions.

The contemporary condition can be characterized by the desire to maintain the connection to the national past, while showcasing the concept of the Greek nation-state. At the same time, an attempt is made to write History textbooks based on the cosmopolitan memory. This could result in modules for a globalized culture in which progress stems from a changing process of reshaping individuals and societies (Todorov, 2003). Two different versions of writing History textbooks are suggested. The first one is characterized by the passion for national memory with emphasis on facts that defined the destiny of the Greek state through the dichotomy between enemies – allies. This paradigm does not merely include the textual version of History, in terms of reproducing past facts, but rather focuses on the future, while memory maintains political and social situations. In terms of content, on the one hand there is a promotion of the nation-state and, on the other hand, the conservative concealing of actions of the "others" – lower social strata, women and social movements. At the same time, the exploration of situations and the multi-dimensional approach[30] are absent.

In this context, the cross-curricular and inter-disciplinary are annulled since the historical content is particularly limited. Considering this version of History as "dogmatic", the other version is about open modules across a global level of correlated cultures, ideologies, political systems and policies and puts forward a multi-level exploration in which the concept of nation-state is withdrawn before an expanded level of historic memory. The content to be chosen should be regarded as important and noteworthy among a plethora of information within a broader terrain of memory[31]. The second version engages individuals with historic facts. As a result, they form their own terms depending on the system of choices in documenting this historic memory.

6. The concept of cosmopolitanism as proposal to design the education policy

The time period under exploration is particularly interesting due to the economic crisis[32], values crisis, lack of trust in political, social, economic and administrative institutions along with the issue of religion and national symbols[33]. They are all conducive to suppressing the removal of religious and national definitions with the excuse of human rights, flexible forms of education for the labor market, while showcasing the religious and national pillars as a value model to contribute to social cohesion[34]. Thus, there is a shift to a conflict between fetishizing religious and national symbols and fetishizing human rights.

A different reading of the recent legislation on obtaining the Greek citizenship implies the disconnection from traditions of the homeland with emphasis on the rules of the Greek state and the indirect demand to obey the rules of the Greek state. The issue of migrant rights is limited to the description of the migrants' structural relations to the institutions[35].

Considering that the Greek education system does not foresee the instruction of migrants' mother tongue, it is well-understood that the concept of citizen includes a historical continuation defined by the instruction of History, a moral conceptualization which identifies the moral with religious values of the particular doctrine. All these are incorporated in the relevant linguistic frame[36] which shapes unifying categories and exclusions at the same time, based on each single culture accepted by the dominant national body. In this pre-defined scenario the migrant students watch the protagonists, the national whole.

The readiness of the Greek education system to correspond to the European principles at least for a unifying education without discriminations and with less inequality presupposes a shift of interest from material goods to securing the democratic function of systems so that individuals can safely and creatively express themselves. In this sense, the focal point is an educational model to reinforce the function of democratic institutions, promote co-operation and create an environment of accepting otherness (Iglehart, 2006; Iglehart & Welzel, 2003). Therefore, any educational reform is tied to the economic modernization and social prosperity. During this period in Greece, a less financially developed country is less tolerant to others. Shifting to an education system with rationalized structures of the content of History and rethinking about the mandatory nature or not of Religious Education with the corresponding symbols point to the exploration of systems beyond the education system.

The issue of democracy and human rights is, implicitly or explicitly, re-examined through the content of History. Based on this perspective, the issue of cosmopolitanism (Cheah & Robbins, 1996) should be discussed. If the education system is aligned with the cosmopolitan principles, certain concepts such as universal justice (Tan, 2004), equality, elimination of ideologies that generate conflicts (Hutchinson, 2005), hostility, establishment of lesser stated with cultural criteria (He, 2005) are studied so as to form different criteria to read History and decide on the content to be taught.

The selective utilization of cosmopolitan principles in a system, distinctive of a nationalistic education policy that should include broader cultural values[37], is of special interest. It seems that a discussion about human rights is merely a technical process of enriching the educational content since the national divisive values that form the foundation of this content are not overlooked. This condition seems to have gained ground over the past decade in the Greek education system as a unique policy of combining the national with the global. It prioritizes the students' need to learn more about other people, as citizens of a global community, and be ready to share this community with citizens of other countries. At the same time, the policy of attaching to national traditions seems to refute the choice for an open education system. Accordingly, Nussbaum (1996) argues that the students in the USA, besides their attention to History and the current conditions of the state, should learn more about the problems of other states. In this respect, illiteracy, hunger, inequalities, ecology, global economy and politics[38] should be showcased because Americans, alike Greek students, seem to be entrapped in an infertile ethnocentrism.

Through our considerations about History and Religious Education, an attempt has been made to outline the educational conditions. A different education policy could focus on the transition from Religious Education to Religious Studies[39], in the form of information about doctrines up to its removal from the Curriculum. Moreover, History with a national content and its traditional national-religious approach should not be placed in globalized conditions; yet, without refuting national identity. This means that the modules can be broadened so that national memory can be functionally correlated to the global history of cultures. This way, students, as global citizens, could contribute to a different paradigm of political and social co-existence. The debate about the structure and the content of the education system is relevant to more general political views on "school investment", a characteristic of education policies.

In particular, one could refer to the association between school and human capital which includes the knowledge, skills and necessary discipline to integrate into the labor market. Based on this perspective, the employment crisis[40], new forms of labor and the general economic environment dictate the necessity to re-define education by taking into consideration the economic dimensions, meaning that participation in the labor market is identified with a social position.

Therefore, people's education is perceived as an economic prerequisite for development and investment both in the individual and the state. Thus, modules irrelevant from the economic environment and the corresponding multi-dimensional cultural setting can be regarded as unnecessary because they hinder the association between school and labor market as well as the integration into complex globalized cultural spaces that presuppose a re-defined moral beyond metaphysical terms and a re-defined policy beyond the strict frame of the nation-state. By using the term "morality", school investment itself becomes a point of comparison from more "moralities" with parallel individual, collective, economic and social dimensions. Reference can be made to: a) family moral and individual recognition, b) productive moral (innovation, market awareness) and c) democratic meritocratic moral that reinforces school competition (Askenazy & Cohen, 2009).

These facts put forward a more general consideration about the form of the education system, the possibilities formed or refuted towards the individual's development as personality and citizen. This can be related to the concepts of democracy, positive or negative attitudes to international inequality problems, quality of life, terrorism, discriminations, etc. (Inglehart & Welzel, 2003).

Notes

1. Institutional or non-institutional processes on new forms of politics (Alasuutari, 2000; Appandurai, 1997), the economic (Fiss & Hirsch, 2005), social and cultural life of new societies are emphasized along the role of ICT on internet societies (Castells, 2000; Mills & Blossfeld, 2005). The role of individuals is also studied in relation to the international and local notions as well as issues of political autonomy (Held, 1991; McGrew, 1992).
2. With regard to their influence on the political decisions of nation-states (Verdier & Breen, 1999).
3. Appandurai's standpoints on e-capitalism in comparison to print capitalism (Liakos, 2005:110-111).
4. According to Hobsbawm (2004:24) modern nations perceive their historical continuity within a unified past.
5. (Indicatively), the Constitution, par. 2 refers to the development of national and religious awareness of the Greek children. This is supported by L. 1566/85 (PASOK government, Ap. Kaklamanis, Minister of Education).
6. (Indicatively) Haynes, 2006 about religion as an element of national identity.
7. "Liminality" is under exploration so as to determine the processes and model that define the nation and the inclusion or exclusion of individuals accordingly (Bhabha, 1990; Byrne, 2005).
8. (Indicatively) Chafe, (1970) & Crow, (2010) talk about the symbolic nature of the verbal part of the picture shapes specific expressions of interpretation.
9. (Indicatively) article 13 of the Constitution refers to religious freedom. However, the interpretation of the word "religion" points to the Eastern Orthodox Religion.
10. Even if the title of the Ministry of Education changes, its character remains the same.

11. International Conference on the «Holy Bible in the modern European culture". November 2007. Deltio ViVlikon Meleton, 26, 36. Artos Zois Publications.
12. A general reference to rituals as means of establishment or legalization (Bourdieu, 1999).
13. (Indicatively) about the construction of History (Fero, 1999).
14. According to the Ministerial Decision F.3/967/103528 and the P.D. 201/98 a morning pray takes place every morning in the schoolyard. Students of other religions attend this practice with respect to their teachers and classmates. Moreover, it is mandatory for the teachers to participate in this practice. This is contrary to the principle of freedom of religion. The rising of the Greek flag is also mentioned in these texts.
15. (Indicativey) Zachou & Kalerante (2007) underline the multi-cultural educational system along with issues of attitudes of both native and foreign students.
16. (Indicatively) about the concept of citizen in post-modern societies (Canivez, 2000).
17. The Constitution of Greece, article 13, par. 1, the European Convention on Human Rights (article 9) and the Universal Declaration of Human Rights (article 18).
18. European Court of Human Rights: decision to remove religious symbols from classrooms (Kathimerini 9-10-2010).
19. Bulletin A.P. 61723/G2/13-06-02, A.P.91109/G2/10-07-08 and A.P.10407/G2/26-08-08.
20. These data derived from a study in Secondary Schools in Attica.
21. Decision of the 2nd department of the European Court for Human Rights, 3rd November 2009.
22. Bulletin 73735/G2/23-06-2010 of the Ministry of Education, Lifelong Learning and Religious Affairs.
23. The total of rules based on globalized values and create a formal or informal right (Meyer et al., 1997).
24. Research on Lyceum students' viewpoints on the History textbook. Nea Pedia, June 2010.
25. Baille, Braudel & Philippe (1963). *The Modern World, History and Cultures*.
26. The three-member committee of the Pedagogical Institute approved the new History textbook for the 6th grade of the Primary School. Act 16/31/5/2005.
27. The Center for Democracy and Reconciliation in South-East Europe published an "Alternative Educational Material for the Instruction of Modern History of South-East Europe.
28. In 2007, the Ministry of Education suggested some interventions as the textbook had been considered incapable of reinforcing national memory and self-awareness. Archive of the Ministry of Education, Correspondence File, 2007.
29. The content of the textbook was associated with L. 2929/2001, article 1. The textbook was finally removed from schools.
30. Zin's (2007) The History of the USA refers to the defeated, natives' slaughter, social movements and the struggle of the Black.
31. There are some interesting studies about the relation between History and collective memory (Halbawchs, 1992; Olick, 2008: 47-58; Young, 1997: 24-29; Misztal, 2003 & Misztal, 2005).

32. About the economic crisis and its effects on Greece (Dove, 2011; Mitsopoulos & Pelagidis, 2012).
33. The definitions about national symbols are differentiated depending on the political and cultural coincidences.
34. About the formation of national identity (Uslaner, 2012).
35. About the institutional framework for migrants and the limitation of rights (Zachou & Kalerante, 2007; Zachou & Kalerante, 2010; Pavlou, 2004, Collective Work, 2007 & Christopoulos, 1997).
36. About the linguistic code and the production of national identity (Fishman, 1982 & Omoniyi, 2011).
37. About the concept of cosmopolitanism in education (Calhoun, 2007).
38. Nussbaum's argumentation includes: 1) Cosmopolitan education helps us learn more about ourselves. 2) Progress is based on international co-operation. 3) We are aware of our moral obligations to the world. 4) We are willing to elimination discriminations.
39. Religious Studies include: a) the History of Religions, b) Comparative Religious Studies, c) Phenomenology of Religion, d) Psychology of Religion, e) Sociology of Religion and f) Philosophy of Religion.
40. Eurostat (7/10/2013) survey about the European areas with decreased GDP. Four of these areas are in Greece.

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Κοινωνική Συνοχή και Ανάπτυξη 2022 17 (1), 81-88

Απόστολος Παπατόλιας,
Θεωρία και πράξη του επιτελικού κράτους: θεωρητικό θεμέλιο, νομοθετική κατοχύρωση, διοικητική πρακτική
Αθήνα: Εκδόσεις Σάκκουλα, 2021

Υπάρχουν πολλές πύλες εισόδου για την προσέγγιση του (επιτελικού) κράτους και καμία φυσικά δεν μπορεί να είναι χρυσή, με την έννοια μιας θεωρίας που μπορεί να διαφωτίσει με ολοκληρωμένο τρόπο το υπό εξέταση φαινόμενο. Η προσέγγιση που υιοθετεί ο Α. Παπατόλιας είναι αυτή του δημόσιου δικαίου (διδάκτορας δημοσίου δικαίου ο ίδιος), του συνταγματικού δικαίου (βλ. σελ. 55), καθώς και της διοικητικής επιστήμης και της θεωρίας της δημόσιας διοίκησης, οι κυρίαρχες τάσεις των οποίων θεωρούν κατά βάση ότι οι δημόσιες πολιτικές (πρέπει να) αναπτύσσονται ως ορθολογικές δράσεις για την επίλυση προβλημάτων. Τέτοιου είδους προσεγγίσεις ενδιαφέρονται πρωτίστως για τη νομιμότητα, αποδοτικότητα και αποτελεσματικότητα της λειτουργίας των θεσμών. Πολύ σημαντικές παράμετροι ομολογουμένως, ωστόσο συχνά παραβλέπονται άλλες διαστάσεις που διαπερνούν τους κρατικούς θεσμούς και την κρατική εξουσία[1] και έχουν να κάνουν, μεταξύ άλλων, με την πολιτική οικονομία και τις επιταγές της κεφαλαιακής συσσώρευσης (Μαρξ), τα μέσα που διαθέτει το κράτος ώστε να μπορεί μονοπωλιακά να (απειλήσει να) ασκήσει το νόμιμο δικαίωμα του φυσικού καταναγκασμού (Βέμπερ), τη διαπερατή σχέση κράτους και κοινωνίας πολιτών, με την κρατική εξουσία ιδωμένη ως ηγεμονία θωρακισμένη με καταναγκασμό (Γκράμσι), τον τρόπο με τον οποίο οι λόγοι νοηματοδοτούν και διαμορφώνουν το κράτος και κατευθύνουν τη δράση προς αυτό (Λακλάου) ή τη διασπορά των μικρο-εξουσιών και τις νέες μορφές κυβερνησιμότητας, μέσω της συνεχούς επιτήρησης και πειθαρχίας, που στοχεύουν στη φυσική ύπαρξη του κάθε πολίτη (Φουκώ), και αποκτούν ολοένα και μεγαλύτερη σημασία στην εποχή της πανδημίας.

Όπως σημειώνει από την πρώτη σελίδα ο συγγραφέας, «επιτελικό κράτος σημαίνει ότι ο θεσμός του κράτους αφενός γίνεται "στρατηγός" του εαυτού του, μέσω της ορθολογικής καθοδήγησης της δράσης του και αφετέρου ότι υιοθετεί τη "στρατηγική προσέγγιση" σε όλες τις βαθμίδες ή τα πεδία παρέμβασής του για τη συνολική επίτευξη των στόχων του». Βεβαίως στην καθημερινή χρήση του όρου, τείνουμε να θεωρούμε το κράτος ως υποκείμενο, το οποίο (πρέπει να) κάνει τούτο και το άλλο, κάτι που για εκείνους που προσεγγίζουν το κράτος ως σχέση (η περίφημη υλική συμπύκνωση ενός συσχετισμού δυνάμεων μεταξύ τάξεων και μερίδων τάξεων κατά τον Πουλαντζά, στην οποία μπορούν άνετα να προστεθούν και οι έμφυλες, φυλετικές και οικολογικές διαστάσεις), είναι εξίσου προβληματικό με την προσέγγιση του κράτους ως πράγματος, το οποίο δύναται ο καθένας να μεταχειρίζεται κατά το δοκούν. Έχοντας κατά νου ότι το κράτος απέχει πολύ από το να είναι ένας ουδέτερος παίκτης ή ένα παθητικό εργαλείο[2], ας δούμε πως αναπτύσσεται η εν λόγω μελέτη του Α. Παπατόλια, η οποία χωρίζεται σε δύο μέρη.

Στο πρώτο μέρος επιχειρείται κατ' αρχάς μια εννοιολόγηση της επιτελικής διακυβέρνησης. Αφού δοθούν οι απαραίτητες διευκρινίσεις για τη διαφορά μεταξύ κυβέρνησης (συγκρότηση και λειτουργία του πολιτικο-διοικητικού μηχανισμού άσκησης της συνταγματικά οριοθετημένης εξουσίας) και διακυβέρνησης (συστηματικές διαδράσεις μεταξύ του κυβερνητικού μηχανισμού και των πεδίων παρέμβασής του), ο συγγραφέας θα επιλέξει για τους σκοπούς της μελέτης έναν ορισμό της διακυβέρνησης πιο κοντά στην κρατοκεντρική αντίληψη του δημόσιου δικαίου, ορίζοντάς την «ως τον τρόπο που ασκείται η διαχείριση της κρατικής εξουσίας από τους θεσμούς της συντεταγμένης

πολιτείας, με έμφαση στον τρόπο καθοδήγησης των δημόσιων πολιτικών για την επιδίωξη του δημόσιου συμφέροντος» (σελ. 12). Άρα λοιπόν, εφόσον η επιτελικότητα αφορά την καθοδηγητική λειτουργία των δημόσιων πολιτικών στο υψηλότερο δυνατό επίπεδο, το ζητούμενο είναι τελικά η «ικανότητα των κρατικών θεσμών να πηδαλιουχούν και να συντονίζουν το σχεδιασμό και την εφαρμογή των δημόσιων πολιτικών, δημιουργώντας παράλληλα τις προϋποθέσεις της επιτυχούς - αποδοτικής υλοποίησής τους» (σελ. 12).

Στη συνέχεια, εξετάζονται, πράγματι, οι διασυνδέσεις μεταξύ των διαφόρων ιστορικών φάσεων του κρατικού παρεμβατισμού και των θεωρήσεων της επιτελικότητας (κράτος-χωροφύλακας, κράτος πρόνοιας και κράτος-ρυθμιστής), φτάνοντας στην εποχή της παγκοσμιοποίησης και της αύξησης της επιρροής των υπερεθνικών πολιτικών και οικονομικών θεσμών, κατά την οποία, σύμφωνα με τον συγγραφέα, το επιτελικό ή στρατηγικό κράτος εμφανίζεται υπό τις διαφορετικές εκδοχές του νεοφιλελεύθερου «ελάχιστου κράτους» αλλά και του «έξυπνου κράτους». Αφού σημειώσω ότι η ευρέως διαδεδομένη αντίληψη που θεωρεί το νεοφιλελεύθερο κράτος ως ένα αδύναμο κράτος είναι λανθασμένη (το ακριβώς αντίθετο συμβαίνει[3], και ο συγγραφέας, καθώς επιχειρεί μια μάλλον σχηματική παρουσίαση ορισμένων προτύπων, δείχνει να το αντιλαμβάνεται αυτό μόνο στην υποσημείωση 6), θα παραθέσω την άποψη που υιοθετεί η μελέτη, ότι δηλαδή, μετά τη δεκαετία του 1990, τις νέες διαχειριστικές πρακτικές του new public management, τις θεωρίες της διακυβέρνησης και τις πρακτικές της πολυεπίπεδης διακυβέρνησης στο πλαίσιο των διεθνών θεσμών και των οργάνων και λειτουργιών της Ευρωπαϊκής Ένωσης, μια νέα αντίληψη για το επιτελικό κράτος έχει διαμορφωθεί: «Σε αντίθεση με τη νεοφιλελεύθερη φαντασίωση της "απόσυρσης του κράτους" στο περιβάλλον της παγκοσμιοποίησης, το "επιτελικό κράτος" αποτελεί μια πρόταση που διατηρεί ανέπαφες τις βασικές κρατικές ρυθμιστικές λειτουργίες, όπως η προώθηση της κοινωνικής αλληλεγγύης και η ενορχήστρωση της οικονομικής ανάπτυξης. Υπό αυτή την έννοια, υποδεικνύει μια "γραμμή άμυνας" απέναντι σε μια άκαμπτη νεοφιλελεύθερη αντίληψη της αυτορρύθμισης της αγοράς…» (σελ. 28). Ο συγγραφέας λοιπόν - όπως και σύσσωμη σχεδόν η ακαδημαϊκή και πολιτική κοινότητα στην Ελλάδα και διεθνώς - υποστηρίζει μια συγκεκριμένη εκδοχή του επιτελικού κράτους, και κωδικοποιεί εν προκειμένω τα νέα δομικά χαρακτηριστικά του σε τρεις κατηγορίες: τη θεμελιώδη διάκριση μεταξύ επιτελικών και εκτελεστικών λειτουργιών, την πρακτική της λειτουργικής κατάτμησης (agencification) και αποκέντρωσης της διοικητικής δράσης, και την αρχή της «συμμετοχικής» και «πολυεπίπεδης» διακυβέρνησης (σελ. 28-54).

Η δεύτερη και τελευταία ενότητα του πρώτου μέρους εξετάζει τη σχέση της επιτελικής διακυβέρνησης και του συντάγματος, περιγράφοντας και ερμηνεύοντας τους νομικούς κανόνες, στους οποίους αποτυπώνονται οι αρχές και οι μέθοδοι του επιτελικού κράτους. Αναλύεται η συνταγματική θέση της οργάνωσης της κυβέρνησης μέσω (α) της διάκρισης κυβερνητικής και διοικητικής εξουσίας, και (β) της άσκησης των κυβερνητικών αρμοδιοτήτων.

Όσον αφορά το (α), καταδεικνύεται κατ' αρχάς ότι η παραδοσιακή διάκριση της νομοθετικής από την εκτελεστική λειτουργία μάλλον υπερβαίνεται, καθώς οι λειτουργίες του νομοθετείν και του κυβερνάν ουσιαστικά εξομοιώνονται στο πλαίσιο της κυβερνητικής εξουσίας, στην οποία με τη σειρά της υποτάσσεται η διοικητική. Η τελευταία δεν μπορεί να αυτοπροσδιορίζεται και να αποφαίνεται αυτοτελώς για τη σκοπιμότητα των ενεργειών της, καθώς δεσμεύεται από τις επιλογές των κυβερνητικών και νομοθετικών οργάνων, όπως προκύπτει από το σύνταγμα και τη λογική της κοινοβουλευτικής δημοκρατίας. Ωστόσο ο συγγραφέας σημειώνει ότι η επέκταση της κρατικής παρουσίας στο σύνολο των τομέων της κοινωνικο-οικονομικής ζωής και η έλευση του λεγόμενου «διοικητικού κράτους» φανερώνουν την τάση αναγνώρισης μιας σχετικής ή περιορισμένης αυτονομίας της «διοίκησης» να «αυτοπροσδιορίζεται», να συμμετέχει δηλαδή στην κανονιστική δραστη-

ριότητα και να θέτει υποχρεωτικούς κανόνες που εξειδικεύουν τον νόμο και εφαρμόζουν δημόσιες πολιτικές, χωρίς πάντως να αμφισβητούν την προτεραιότητα του αμιγώς πολιτικού στοιχείου της στρατηγικής σύλληψης των πολιτικών από την κυβέρνηση, που μόνη αυτή χαράσσει τον προσανατολισμό και ορίζει τις επιδιώξεις της «εφαρμοστικής διοίκησης» (σελ. 66). Ο Α. Παπατόλιας εκτιμά ότι «ο διαχωρισμός της επιτελικής λειτουργίας του "κυβερνάν-νομοθετείν" από την αμιγώς εκτελεστική λειτουργία του "διοικείν", που προκρίνουν οι θεωρίες του "ύστερου επιτελικού κράτους" επιτάσσει και την παραχώρηση μεγαλύτερης αυτονομίας δράσης στην "εφαρμοστική διοίκηση", αφενός επιτρέποντας τη λειτουργική χειραφέτησή της έναντι της κυβέρνησης και αφετέρου διευκολύνοντας τους υπουργούς να αφιερωθούν στο κυρίως κυβερνητικό έργο τους, δηλαδή στις συνταγματικά οριοθετημένες "επιτελικές" πολιτικές αρμοδιότητές τους» (σελ. 67). Το δικό μας σχόλιο είναι ότι εδώ έχουμε φτάσει σε ένα κομβικό σημείο για τη θεωρία του επιτελικού κράτους, και ενώ θίγεται το ζήτημα της σχέσης πολιτικής και διοίκησης, κλείνει αμέσως μετά (για να ανοίξει και πάλι σε επόμενα κεφάλαια), με την πρόταση του συγγραφέα να τεθεί ως προτεραιότητα ο συστηματικός διαχωρισμός των επιτελικών από τις εκτελεστικές αρμοδιότητες. Αυτή η πρόταση αποτελεί και βασικό επιχείρημα του βιβλίου, όμως θα πρέπει να είμαστε ευαισθητοποιημένοι και ως προς μια μεγάλη συζήτηση που παραμένει ανοιχτή ήδη από την έκδοση του κλασικού βιβλίου του Dwight Waldo για το διοικητικό κράτος[4], ο οποίος άσκησε κριτική σε μια στεγανοποιημένη διχοτόμηση πολιτικής και διοίκησης και σε μια εργαλειακή αντίληψη περί ουδέτερης και αποστασιοποιημένης δημόσιας διοίκησης, η οποία υποτίθεται ότι είναι εκεί για να εφαρμόζει άκριτα τις εντολές του πολιτικού προσωπικού, ακόμα και αν αυτές παραβιάζουν τη νομιμότητα και το κράτος δικαίου.

Για το (β), σημειώνονται οι δύο τυπολογίες συστημάτων οργάνωσης της κυβέρνησης, το συλλογικό, όπου στο υπουργικό συμβούλιο ο πρωθυπουργός παραμένει primus inter pares, και το πρωθυπουργοκεντρικό, όπου ο πρωθυπουργός είναι primus solus μεταξύ των μελών του υπουργικού συμβουλίου. Αν και το σύνταγμά μας φανερώνει μια προτίμηση προς το συλλογικό σύστημα, είναι αδιαμφισβήτητη η δεσπόζουσα θέση του πρωθυπουργού στο πολίτευμα. Ωστόσο ο «πρωθυπουργοκεντρισμός» δεν ερμηνεύεται ως «πρωτογενές συνταγματικό φαινόμενο», αλλά αποδίδεται στα ιδιαίτερα χαρακτηριστικά της λειτουργίας των κομμάτων (σελ. 80). Σε κάθε περίπτωση, παράγοντες όπως οι παγκοσμιοποιημένες αγορές, ο διεθνής ανταγωνισμός, οι υπερεθνικές διευθετήσεις σε ένα περιβάλλον δημοσιονομικής κρίσης, η πολυπλοκότητα των ζητημάτων, η συνεχώς αυξανόμενη παραγωγή ρυθμίσεων, η ένταση της διοικητικής αλληλεξάρτησης και η εξασφάλιση της κυβερνητικής σταθερότητας, δημιουργούν την ανάγκη ενίσχυσης του διυπουργικού συντονισμού και συνεκτικής διαμόρφωσης των δημόσιων πολιτικών και των ρυθμίσεων. Για τον λόγο αυτό, η διοικητική επιστήμη προτείνει τη δημιουργία ενός «κέντρου διακυβέρνησης» στον πυρήνα της εκτελεστικής λειτουργίας, που αποτελείται από ένα περιορισμένο σύνολο οργάνων, «τα οποία έχουν την ευθύνη και την ικανότητα να αναπτύσσουν "στρατηγική", υπό την έννοια του "στρατηγικού σχεδιασμού" των δημόσιων πολιτικών, καθώς και να εξασφαλίζουν των αποτελεσματική παρακολούθηση και εφαρμογή της κυβερνητικής πολιτικής» (σελ. 83). Στις χώρες του ΟΟΣΑ, ο επικεφαλής αυτού του κέντρου διακυβέρνησης μπορεί να είναι είτε ένα πολιτικό πρόσωπο, το οποίο αποχωρεί σε περίπτωση πολιτικής αλλαγής, είτε ένας ανώτατος δημόσιος υπάλληλος, ο οποίος παραμένει στη θέση του και εγγυάται ως εκ τούτου τη «συνέχεια της διοίκησης» και τη διατήρηση της «θεσμικής μνήμης». Στη χώρα μας έχει εδραιωθεί ένας αυταρχικός τύπος διεύθυνσης της κυβερνητικής λειτουργίας, που έχει αποδοθεί ως «πρωθυπουργικός κυβερνητισμός» (σελ. 86). Ο πρωθυπουργός έχει αναδειχθεί ως ο κεντρικός πόλος ισχύος, καθώς λόγω της αυξημένης εκλογικής και κομματικής νομιμοποίησης που απολαμβάνει υποτίθεται ότι μπορεί να εξασφαλίσει την ενιαία και αποτελεσματική διεύθυνση του κρατικού μηχανισμού, ωστόσο οι επιδόσεις τόσο στο επίπεδο της ρυθμιστικής-

διοικητικής ικανότητας του πολιτικού συστήματος όσο και της προώθησης μιας πιο συμμετοχικής μορφής διακυβέρνησης είναι φτωχές.

Με δεδομένο το έλλειμμα συντονισμού των κυβερνητικών πολιτικών στη χώρα μας, ο Α. Παπατόλιας, κλείνοντας το πρώτο μέρος, αναζητά το ισχυρό «κέντρο διακυβέρνησης», συστατικό στοιχείο της επιτελικότητας, μέσα από την εξέταση διαφορετικών μεθόδων συντονισμού (από τον κατακερματισμό και τη φεουδοποίηση της διοίκησης στον διοικητικό συντονισμό, και από το «κανονιστικό πρότυπο» στη διοίκηση προσανατολισμένη στις δημόσιες πολιτικές), συμπεριλαμβανομένων και των αποπειρών του ελληνικού πολιτικο-διοικητικού συστήματος για τον συντονισμό του κυβερνητικού έργου (συλλογικά κυβερνητικά όργανα, Γενικές Γραμματείες Πρωθυπουργού, Κυβέρνησης, Συντονισμού), και προχωρώντας σε μια συγκριτική μελέτη με παραδείγματα άλλων χωρών (ΗΠΑ, Γερμανία, Γαλλία, Ηνωμένο Βασίλειο) προκειμένου να διερευνηθεί η (συμπληρωματική) σχέση των δύο ρόλων της «πολιτικής καθοδήγησης» και του «διοικητικού συντονισμού».

Το δεύτερο μέρος του βιβλίου έρχεται στα καθ' ημάς και παρέχει πλούτο ιστορικών πληροφοριών αναφορικά με τις νομοθετικές, θεσμικές και πολιτικές πρωτοβουλίες που αναπτύχθηκαν στη χώρα μας για τη δημιουργία του επιτελικού κράτους και της επιτελικής διακυβέρνησης. Έχει ενδιαφέρον η επισήμανση ότι αυτές οι πρωτοβουλίες συνέπεσαν με την περίοδο της οικονομικής κρίσης και της δημοσιονομικής προσαρμογής. Η κατ' ουσίαν χρεοκοπία της χώρας έφερε στο προσκήνιο τις δομικές αδυναμίες του συστήματος διακυβέρνησης, προκαλώντας την απαίτηση των δανειστών για μεταρρύθμισή του προς την κατεύθυνση της ενίσχυσης της επιτελικής του λειτουργίας. Παράλληλα, συστάσεις των διεθνών οργανισμών και ιδιαίτερα η Έκθεση του ΟΟΣΑ του 2011, καλούσαν για τη συγκρότηση ενός επιτελικού κέντρου διακυβέρνησης, ενώ και εσωτερικές μεταρρυθμιστικές πρωτοβουλίες, οι οποίες όμως έμειναν αναξιοποίητες, όπως η Έκθεση της ΕΥΣΣΕΠ του 2010 και το σχέδιο νόμου της Επιτροπής Σωτηρέλη το 2011, ενστερνίζονταν απολύτως τη λογική ενός ισχυρού και ευέλικτου επιτελικού κράτους. Ο πρόσφατος νόμος 4622/2019 για το επιτελικό κράτος, ο οποίος και αναθέρμανε τη συζήτηση γύρω από αυτά τα θέματα, ήρθε ως κατάληξη της διαχρονικής επίκλησης του επιτελικού κράτους από πλευράς σχεδόν όλων των πολιτικών δυνάμεων αλλά και της επιστημονικής κοινότητας. Ένα μεγάλο μέρος του βιβλίου αφιερώνεται φυσικά στον νόμο 4622/2019, ενώ παρουσιάζονται και τα βασικά σημεία του πορίσματος της Επιτροπής Κοντιάδη, που λειτούργησε το 2020 και πρότεινε τη ριζική αποκέντρωση του κράτους, με μεταφορά αρμοδιοτήτων στις περιφέρειες και την τοπική αυτοδιοίκηση, στο πλαίσιο της υιοθέτησης του μοντέλου της «πολυεπίπεδης διακυβέρνησης», το οποίο αποτελεί βασική προϋπόθεση για τη συγκρότηση του επιτελικού κράτους.

Πριν αναφερθούμε στον νόμο για το επιτελικό κράτος, θα θίξουμε το συναφές ζήτημα που απασχόλησε τις απόπειρες για διοικητική μεταρρύθμιση της μνημονιακής περιόδου, και συγκεκριμένα το αίτημα της «αποπολιτικοποίησης» της δημόσιας διοίκησης. Ο Α. Παπατόλιας, ο οποίος είναι και σύμβουλος του ΑΣΕΠ από το 2016, αναφέρεται στο σχετικό κεφάλαιο στις προσπάθειες (α) «αποπολιτικοποίησης» και βελτίωσης της διοικητικής ικανότητας του κράτους, και (β) αξιοκρατικής στελέχωσης της δημόσιας διοίκησης και διαχωρισμού της «πολιτικής» από την «υπηρεσιακή» διοίκηση.

Για το (α), επειδή ο όρος «αποπολιτικοποίηση» επιδέχεται διαφόρων ερμηνειών, διευκρινίζεται από τον συγγραφέα ότι στη χώρα μας, η «"αποπολιτικοποίηση" ως κεντρικό μεταρρυθμιστικό πρόταγμα, είναι συνυφασμένη κυρίως με τον εξορθολογισμό και εκσυγχρονισμό της διοίκησης και νοείται πρωτίστως ως αποκομματικοποίηση της διοικητικής δράσης» (σελ. 133). Εδώ τίθενται σημαντικά ζητήματα που άπτονται των σχέσεων πολιτικής και διοίκησης και είχαν συζητηθεί εν συντομία στο πρώτο μέρος του βιβλίου. Έτσι λοιπόν, «η αποσύνδεση της τεχνικής εφαρμογής από

τις πολιτικές αποφάσεις» αποτελεί την «πεμπτουσία» της μνημονιακής στρατηγικής (ν. 4336/2015) για την «αποπολιτικοποίηση» (σελ. 135), ενώ αυτό που παρατηρείται στην πράξη είναι ένας πολλαπλασιασμός αφενός δημιουργίας φορέων ειδικού σκοπού σε απόσταση από την ιεραρχία των υπουργείων και αφετέρου σύστασης αυτοτελών μονάδων στο εσωτερικό των υπουργείων. Αυτή η διαδικασία (agencification), εγείρει μια σειρά από προβλήματα, όπως το έλλειμμα δημοκρατικού ελέγχου και λογοδοσίας, η διάσπαση των αρμοδιοτήτων και κατακερματισμού των δομών, που αυξάνει την ανάγκη για ενιαίο κέντρο διακυβέρνησης, αλλά και η αυτο-υπονόμευση της ίδιας της διαδικασίας της «αποπολιτικοποίησης», στο βαθμό που οι όροι λειτουργίας των ανεξάρτητων φορέων καθορίζονται από την πολιτική ηγεσία (σελ. 140-141). Από τη μια μεριά, αποσπώνται αρμοδιότητες από την κεντρική διοίκηση, προκειμένου να αποσυνδεθούν οι διοικητικές λειτουργίες από την πολιτική σφαίρα, ενώ από την άλλη ενισχύεται το πολιτικό στοιχείο, σε βάρος του διοικητικού, με τις νέες αυτοτελείς δομές που υπάγονται απευθείας στην πολιτική ηγεσία. Κατ' αυτόν τον τρόπο, όπως σημειώνει ο συγγραφέας, «παράλληλα με την τάση της λειτουργικής αποκέντρωσης, αναπτύσσονται αντίρροπες δυνάμεις που ακυρώνουν τη θεσμική αυτονομία των νέων φορέων και φανερώνουν την ανθεκτικότητα του παραδοσιακού τρόπου διοικητικής λειτουργίας, ο οποίος συνδυάζει τον πληθωρισμό των δομών με τα άτυπα δίκτυα επιρροής και την "υπερ-πολιτικοποίηση" της διοικητικής κορυφής» (σελ. 141).

Αναφορικά με το (β), ο συγγραφέας τονίζει ότι «η χαρακτηριστικότερη ποιοτική διάσταση της μεταρρύθμισης έγκειται στη σύνδεση της "αποπολιτικοποίησης" της δημόσιας διοίκησης με την επιταγή της αξιοκρατίας» (σελ. 142), και αυτό εξειδικεύεται με κατευθύνσεις όπως «η αμφισβήτηση της κατάληψης θέσεων στην κορυφή της πυραμίδας από μετακλητούς, η ανάδειξη του "επαγγελματισμού" των στελεχών, η αθρόα εισαγωγή επιστημονικών "τεχνικών διοίκησης" και η βελτίωση των λειτουργιών συντονισμού και στρατηγικού σχεδιασμού» (σελ. 142). Σε αυτό το πλαίσιο, θεωρείται ότι ο νόμος 4369/2016 και ιδίως οι διατάξεις για τη σύσταση εθνικού μητρώου επιτελικών στελεχών της δημόσιας διοίκησης και την επιλογή διοικητικών γραμματέων στα υπουργεία, καθώς και προέδρων και μελών στα νομικά πρόσωπα του δημόσιου τομέα, αποτέλεσε μια μεταρρυθμιστική τομή στην κατεύθυνση της απαλλαγής της διοικητικής κορυφής από την αθέμιτη κομματική διείσδυση και επιρροή (σελ. 143), ενώ και ο μεταγενέστερος νόμος 4622/2019 για το επιτελικό κράτος, με τις διατάξεις για τους υπηρεσιακούς γραμματείς των υπουργείων, επιδιώκει να μετριάσει την ανισορροπία μεταξύ διοικητικού και πολιτικού συστήματος. Αφού επισημάνει τον καθοριστικό ρόλο του ΑΣΕΠ, το οποίο απολαμβάνει καθολικής αποδοχής ως εγγυητής της αξιοκρατικής ισότητας, στις διαδικασίες που σχετίζονται με τη στελέχωση του δημόσιου τομέα, ο συγγραφέας εντοπίζει σημαντικές διαφορές μεταξύ των δύο νομοθετημάτων: ενώ ο πρώτος νόμος (κυβέρνηση ΣΥΡΙΖΑ) τοποθετήθηκε αρνητικά στον «λειτουργικό διαχωρισμό των αρμοδιοτήτων» που αποκόπτει τον σχεδιασμό (επιτελικές αρμοδιότητες) από την υλοποίηση (εκτελεστικές) των πολιτικών και κατακερματίζει τη διοικητική ύλη, διευκολύνοντας έτσι και την ιδιωτικοποίηση των κρατικών λειτουργιών, ο δεύτερος νόμος (κυβέρνηση ΝΔ) δεν απάντησε κατά τον ίδιο τρόπο, εφόσον προέκρινε τη λύση της διατήρησης των τοποθετημένων με πολιτικά κριτήρια γενικών γραμματέων των υπουργείων σε ένα ιδιότυπο καθεστώς συνύπαρξης με τους υπηρεσιακούς γραμματείς που προέρχονται από τη διοίκηση (σελ. 147). Εδώ βρισκόμαστε και πάλι στην καρδιά του ζητήματος της σχέσης πολιτικής και διοίκησης, και ένα δικό μας σχόλιο είναι ότι θα βοηθούσε ενδεχομένως η διατύπωση μιας πιο ξεκάθαρης θέσης του ίδιου του συγγραφέα πάνω σε αυτό, η οποία να διατρέχει με συνέπεια όλο το βιβλίο (πρβλ. σελ. 67, 147, 164-167, 215-223, 243-262).

Φτάνοντας, τέλος, στον νόμο 4622/2019, ο Α. Παπατόλιας αφού παρουσιάσει τη σύσταση και οργάνωση της Προεδρίας της Κυβέρνησης και τη νέα μέθοδο προγραμματισμού και παρακο-

λούθησης του κυβερνητικού έργου, διαπιστώνοντας ότι το νομοθέτημα «εισάγει για πρώτη φορά στη χώρα με έναν απολύτως στεγανό τρόπο τη διάκριση του πυλώνα της "πολιτικής διοίκησης" από αυτόν της "υπηρεσιακής διοίκησης"» (σελ. 215), θα εστιάσει στην κριτική στο «επιτελικό κράτος». Κριτική που έγινε τόσο από τους εκπροσώπους των κομμάτων της αντιπολίτευσης, όσο και από κοινωνικούς φορείς και εκπροσώπους της επιστημονικής κοινότητας, και η οποία προσανατολίστηκε σε ζητήματα: (α) συνταγματικότητας των ρυθμίσεων (υπερσυγκέντρωση εξουσιών στον πρωθυπουργό και υποβάθμιση του ρόλου των υπουργών), (β) αποτελεσματικότητας (έλλειψη μεταρρυθμιστικής συνέχειας και γραφειοκρατική υπερσυγκέντρωση στην Προεδρία της Κυβέρνησης), και (γ) πολιτικής κατεύθυνσης της μεταρρύθμισης (ατελής προσέγγιση του προγραμματισμού των δημόσιων πολιτικών, καθώς δεν ευνοείται η συμμετοχική-εταιρική διακυβέρνηση, ψευδεπίγραφη «επιτελικότητα» του συστήματος, εφόσον δεν διακρίνονται οι επιτελικές από τις εκτελεστικές λειτουργίες, και προβληματική - καθότι στεγανοποιημένη - διάκριση υπηρεσιακής από την πολιτική διοίκηση, η οποία επιτείνει τις αδυναμίες συντονισμού των πολιτικών).

Ο αναγνώστης θα βρει σε αυτό το κεφάλαιο τα κύρια επιχειρήματα της κριτικής στον νόμο για το επιτελικό κράτος, τα οποία, όπως σημειώνει ο συγγραφέας, άλλοτε αστοχούν και άλλοτε εμφανίζονται τεκμηριωμένα (σελ. 263). Στο βαθμό που ο νόμος 4622/2019 και οι διαδικασίες που προβλέπει εφαρμόζονται, θα απαντηθούν στην πράξη και τα ερωτήματα που παραμένουν μετέωρα (σελ. 260), και αφορούν κατά ένα μεγάλο μέρος διάφορες όψεις του τρόπου διευθέτησης των σχέσεων πολιτικής και διοίκησης. Το ξεκαθάρισμα του τοπίου για τη λειτουργία της κυβέρνησης και των κυβερνητικών οργάνων με ένα νέο νομοθέτημα που θα ενίσχυε τη συνεκτικότητα των δομών και πολιτικών ήταν απαραίτητο[5]. Ωστόσο δεν μπορεί να παραβλεφθεί η κριτική για την αφόρητη «δομομανία» (σελ. 241-243) που χαρακτηρίζει τα εγχώρια μεταρρυθμιστικά εγχειρήματα[6], και η οποία στην περίπτωση του σημερινού κέντρου διακυβέρνησης δείχνει να μπλέκει με μια «διαδικασιοκρατία» (σελ. 264), δημιουργώντας διοικητική υπερφόρτωση στην κορυφή, καθιστώντας δύσκολη τη διαχείριση των συναρμοδιοτήτων, δυσχεραίνοντας την ευέλικτη πολιτική ανταπόκριση στις διαρκώς μεταβαλλόμενες συνθήκες, και αυξάνοντας τις ανάγκες συντονισμού, συμπεριλαμβανομένου του συντονισμού των νέων συντονιστικών μονάδων. Αυτό δεν σημαίνει ότι η τήρηση συγκεκριμένων διαδικασιών για τον προγραμματισμό, τον συντονισμό και την αξιολόγηση εφαρμογής των πολιτικών δεν είναι απαραίτητη και θεμιτή, κάθε άλλο, αλλά η κριτική που διατυπώνεται είναι ότι ο νόμος 4622/2019 διαπνέεται από έναν «οργανωτισμό», με την έννοια ότι επικεντρώνεται αποκλειστικά σε δομές και διαδικασίες, και αφήνει εκτός πλαισίου το ζήτημα μιας πιο συλλογικής και συμμετοχικής διαμόρφωσης των δημόσιων πολιτικών.

Συμπερασματικά, το βιβλίο του Α. Παπατόλια αποτελεί βασικό κείμενο αναφοράς και συμβάλλει ουσιαστικά στην κατανόηση τόσο των θεωρητικών ζητημάτων όσο και της διοικητικής πρακτικής γύρω από τη διαμόρφωση του σύγχρονου επιτελικού κράτους. Ο συγγραφέας είναι ευαισθητοποιημένος ως προς το χάσμα μεταξύ τυπικών κανόνων και άτυπων πρακτικών που χαρακτηρίζουν τη λειτουργία του ελληνικού πολιτικο-διοικητικού συστήματος (σελ. 263), και γι αυτό δεν αρκείται σε μια περιγραφή του ισχύοντος νομοθετικού πλαισίου. Αφού αναφερθεί στο περιεχόμενο και το ιστορικό των μεταρρυθμίσεων και στον επιστημονικό και πολιτικό διάλογο γύρω από τη λειτουργία των νέων θεσμών και διαδικασιών, δεν διστάζει να καταθέσει τη δική του οπτική για το επιτελικό κράτος. Έτσι λοιπόν, υπό τις αυξανόμενες πιέσεις και απειλές της «εποχής της διακινδύνευσης», «το επιτελικό κράτος, δεν θα είναι πια το "ελάχιστο κράτος" της νεοφιλελεύθερης αντίληψης, αλλά το κράτος που αναπτύσσει στο έπακρο την ικανότητα της στρατηγικής πρόβλεψης των κινδύνων ή των επιπτώσεων των πολιτικών του, καθώς και του συντονισμού των επιμέρους οργανωτικών του μονάδων για την επίτευξη συγκεκριμένων στόχων. Σε αυτό το σχήμα, ένα κράτος είναι "επι-

τελικό" επειδή επικεντρώνεται στις βασικές λειτουργίες της στρατηγικής θέασης, της προληπτικής οργάνωσης της αβεβαιότητας και της συντονισμένης διαχείρισης όλων των διαθέσιμων πόρων για τη θωράκιση της κοινωνίας, της οικονομίας και των δικαιωμάτων των πολιτών απέναντι σε κάθε λογής απρόβλεπτες κρίσεις ή απειλές. Είναι "επιτελικό" επειδή λειτουργεί στην πράξη ως εγγυητής της συνολικής "ανθεκτικότητας" της κοινωνίας, γνωρίζοντας να αναθέτει ρόλους και να κατανέμει πόρους, καθώς και να βελτιώνει συνεχώς την επιχειρησιακή του επάρκεια... Είναι το "έξυπνο κράτος" που επινοεί διαρκώς νέα εργαλεία και μείγματα πολιτικών για να ενισχύσει τις άμυνές του και να παραμείνει "ανθεκτικό" στο παγκόσμιο ανταγωνιστικό περιβάλλον, συνδυάζοντας πολιτική αυτονομία με οικονομική ανθεκτικότητα» (σελ. 269, 270).

Βεβαίως αυτές οι δεοντολογικές κρίσεις που συνοδεύουν την κριτική προσέγγιση του βιβλίου, δείχνουν ότι ο συγγραφέας - όπως και οι άλλοι μελετητές της διοικητικής επιστήμης - εστιάζει στην εσωτερική λογική της διαμόρφωσης των κρατικών δομών και πολιτικών και ενδιαφέρεται να δώσει λύσεις στα προβλήματα. Πράγματι, δεν είναι λίγο πράγμα να μπορείς να οικοδομήσεις ένα επιτελικό κράτος κατά τον τρόπο που το αντιλαμβάνεται ο συγγραφέας, αλλά και που το επιθυμεί ο πολίτης. Ωστόσο ένα τελευταίο σχόλιό μας θα ήταν ότι μπορούμε ταυτόχρονα να είμαστε ανοιχτοί και σε άλλες κριτικές θεωρίες που δεν νοιάζονται τόσο να δώσουν λύσεις στα προβλήματα εντός του υφιστάμενου θεσμικού πλαισίου, αλλά προσεγγίζουν το κράτος ως ένα από τα πολλά κέντρα εξουσίας, όπου αναπαράγονται οι κυρίαρχες κοινωνικές σχέσεις, οι οποίες μπορεί να εμπερικλείουν σχέσεις κυριαρχίας, εκμετάλλευσης και ανισότητας. Το (επιτελικό) κράτος μπορεί να ιδωθεί και ως ένας μηχανισμός δόμησης της ανταπόκρισης της πολιτικής στη διαδικασία της κοινωνικής αναπαραγωγής, τόσο υλικής όσο και συμβολικής, καθώς συνεχώς οργανώνει και παράγει νέα γνώση για τα αντικείμενα που επιλέγει να παρέμβει και να κατευθύνει με τον έναν ή τον άλλο τρόπο[7]. Και θα πρέπει να παραμένουμε πάντα ευαισθητοποιημένοι ως προς τη στρατηγική επιλεκτικότητα του κράτους, η οποία τείνει να ευνοεί ασύμμετρα ορισμένες κοινωνικές δυνάμεις, δομές, διαδικασίες και πολιτικές έναντι άλλων.

Νίκος Τράντας
Πάντειο Πανεπιστήμιο

Notes

1. Βλ. περαιτέρω και Bob Jessop (2011) 'The State: Government and Governance', in A. Pike, A. Rodríguez-Pose and J. Tomaney, eds, *Handbook of Local and Regional Development*, London: Routledge, 239-248.
2. Βλ. και Bob Jessop (2010) 'Redesigning the State, Reorienting State Power, and Rethinking the State', in K.T. Leicht and J.C. Jenkins, eds, H*andbook of Politics: State and Society in Global Perspective,* New York: Springer, 41-61.
3. Ενδεικτικά, Ben Jackson (2010) 'At the Origins of Neo-Liberalism: The Free Economy and the Strong State, 1930-1947', *The Historical Journal,* 53(1), 129-151· Philip Mirowski (2014) The Political Movement that Dared not Speak its own Name: The Neoliberal Thought Collective Under Erasure, Institute for New Economic Thinking, Working Paper No. 23· William Davies (2018) 'The Neoliberal State: Power against 'Politics'', in D. Cahill, M. Cooper, M. Konings & D. Primrose, eds, *The Sage Handbook of Neoliberalism*, p. 273.
4. Dwight Waldo (1948) *The Administrative State: A study of the Political Theory of American Public Administration,* New York: The Ronald Press Company.

5. Δεδομένου μάλιστα ότι οι προηγούμενες νομοθετικές παρεμβάσεις για την κυβέρνηση και τα κυβερνητικά όργανα είχαν γίνει πολύ παλαιότερα, με τον νόμο 1558/1985 και εν συνεχεία με την κωδικοποίηση της σχετικής νομοθεσίας στο προεδρικό διάταγμα 63/2005.
6. Ενίοτε και με παρότρυνση του «ξένου παράγοντα». Ενώ στη βιβλιογραφία για την οργάνωση και διοίκηση οργανισμών και θεσμών, υποστηρίζεται ότι είναι προτιμότερο, δηλαδή πιο αποδοτικό και αποτελεσματικό, να «χτίζεις» πάνω σε ήδη υπάρχοντες θεσμούς, δομές, υπηρεσίες και πόρους, παρά να δημιουργείς απ' την αρχή νέους θεσμούς ή ρυθμίσεις, συστάθηκε το 2013, κατ' απαίτηση της task force, η Γενική Γραμματεία Συντονισμού, ενώ θα μπορούσε να είχε επιλεγεί η ενίσχυση με νέες αρμοδιότητες και οργανωσιακούς πόρους της Γενικής Γραμματείας της Κυβέρνησης, η οποία ήδη διέθετε μια συσσωρευμένη τεχνογνωσία σε θέματα διυπουργικού συντονισμού.
7. Ulrich Brand (2013) 'State, context and correspondence. Contours of a historical-materialist policy analysis', *Austrian Journal of Political Science* 42(4): 425-442.

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Κοινωνική Συνοχή και Ανάπτυξη 2022 17 (1), 89-92

Odyssea: A social NGO supporting the employability of vulnerable young people

Odyssea is a non-profit organization that supports vulnerable young people with access to employment opportunities in society, by providing tailored vocational and life-skills training along with employability services. Odyssea's mission is to ensure that people have equal opportunities by harnessing the power of knowledge for employment and personal development.

The problem

Young people are the driving force of any society. They are the most vibrant, dynamic and vigorous part of it. They are the foundation of development and progress, the future shapers, and the fearless voices that move society forward. Young people make up over a quarter of the global population, yet they are often excluded from opportunities to learn and work, inhibiting their ability to support themselves and be productive members in society. Worldwide, youth unemployment rates have not changed significantly over the last decade, nor are they expected to improve significantly in the next few years.

Today, 2 in 5 young people in Greece are unemployed and 40% of young people between 16 and 34 years old are at risk of poverty or social exclusion. Our country holds the highest youth unemployment rate in the EU. Even when one has a job, they often remain unable to provide the basics for themselves. In-work poverty in Greece is also one of the highest in Europe and is seriously affecting the physical and mental well-being of those who experience it. Young people with low levels of education, limited job experience, a lack of basic skills and access to skills training, are therefore trapped in unemployment and poverty.

At the same time, the cracks in the international humanitarian system have been evident for years, for those willing to look. While the humanitarian system's ability to provide lifesaving assistance at the outbreak of a crisis is largely laudable, the inability of actors to provide programs that would result in dignified lives for marginalized and displaced groups, ultimately results in dependency, estrangement and eventually the loss of hope.

The solution

The team of Odyssea works with and for economically and socially vulnerable young people to help them gain the skills and confidence they need to get a job, realize their goals and aspirations, and become productive members in society. We ensure that they have access to employment opportunities, and empower them to believe in their own ability to shape their future and contribute to progressing their own life and their community.

Odyssea is encompassing all its services in an integrated holistic model that places emphasis on employability services and bridges people with the world of work. Odyssea in 2022 through the use of psychometric assessment tools and the Odyssea employability platform will be providing cutting edge services (ex. talent and job matching algorithms directly linking job seekers with hiring companies) to its beneficiaries resulting in scaled impact quantitatively and qualitatively. Moreover, including such tools and processes enhances our commitment to an evidence-based model for decision making and allows us to share valuable Data and good practices with other organizations of the humanitarian ecosystem.

The early years

One could trace Odyssea's humanitarian actions back to 2014 when a group of Greek friends that were living abroad decided to return to Greece amidst the zenith of the economic crisis and contribute towards transforming the plethora of social challenges into opportunities. Led by award winning architect and social innovator Jai Mexis, the team started directly on the field by setting up social kitchens and community spaces as part of the solidarity movement. Their initiative aimed to showcase the resourceful and creative side of the people of this country, promoting a positive image of Greece.

Odyssea was officially founded by Jai in early 2016 and gradually developed into a dynamic group of social entrepreneurs, architects, engineers and finance experts working together to develop innovative models and solutions to systemic social issues for Greece and other parts of the world. Driven both by the deep commitment to provide assistance to those in need, and sensing real opportunities to provide more effective, efficient and meaningfully impactful aid, Odyssea was formed as a multi-disciplinary leadership team with complementary skill sets and experience. The team was galvanized by a shared set of values that form the basis of its ethos.

The first version of Odyssea was created around Astrolab, a small-scale workshop of digital fabrication. A shared makerspace that provided technological education, mentorship and open access to hi-tech tools and skills to help catalyze positive social change. Through its offerings, Astrolab seeked to serve makers, students, organizations, and entrepreneurs.

Soon, the educational aspect of Astrolab evolved into a stream of vocational training programs, responding to society's growing need for a means to integrate vulnerable, excluded members. The high quality of skills provided by the programs, soon attracted hiring parties and birthed the opportunity to establish a new department, the Odyssea Employability office.

The present

By the end of 2021, Odyssea had provided services to over 3000 vulnerable people. A key addition to assist this achievement was the creation of the Academy Campus, a 600m^2 training facility specially designed to simulate real-life professional workspaces. In this space Odyssea was able to further scale up its operational capacities to over 1,800 students annually. The hybrid learning approach of blending theory with practice increased learning outcomes and rendered the beneficiaries highly competitive in the job market. What is more important however, is that the Academy serves as an inspiring safe space, a nurturing environment for personal growth, a melting pot that includes all races, genders, religions and social backgrounds. Within the educational process Odyssea creates a cultural hub that welcomes diverse mentalities and serves as an integrational stepping stone.

To expand its outreach, Odyssea has initiated a collaboration with every major NGO that operates in Greece. Since Odyssea's holistic approach of integration is unique in the humanitarian field, a huge awareness campaign took place between 2020-2021 in order to inform relevant organization about the individual services offered and the means of cooperation. Very soon a referral system was established, allowing NGO partners to work closely with Odyssea and complete the chain of integrational activities.

The Employability department has been developed to conclude the beneficiary's journey by providing career counseling services and networking with the labor market. The goal is to improve the skills of the beneficiaries in order to promote them effectively in the field of work.

In a solid effort to bring the job seekers closer to the hiring companies the department aims to create an impact that will promote social cohesion and avoid xenophobic, racist phenomena or phenomena of exclusion that are caused by unemployment and social isolation.

Odyssea's contribution has not gone unnoticed in the corporate world as well, as more companies reach out with certain requests to cover their needs in personele. Slowly but with a steady pace, Odyssea has been creating a name in the work market synonymous to integrity, reliability and solid results.

The future

Gazing into the uncertainty of a post-pandemic future, Odyssea is determined, now more than ever, to upscale its impact to a national level, offering unlimited access and guaranteeing unrivaled results. In that tone, Odyssea is working on the development of the "Odyssea employability platform", an innovative online service to address the problem of the ever growing gap between job seekers and hiring companies. The platform combines innovative tools such as psychometrics, profile verification and AI recommendations to support both employers and their potential employees.

To complement the process of preparing potential employees, Odyssea has initiated a new type of Vocational Training courses. This type of courses will offer specific training, tailored to certain needs of certain companies or fields. Detailed research is required to determine the content and the syllabus of the course which, ideally, will be co-decided upon by members of the company or seasoned professionals in the field respectively. The advantage of these courses will be a significantly higher employment rate since the graduates will gain specific expertise to perfectly respond to the needs of Odyssea's collaborating companies.

A beneficiary's journey

To better understand the holistic service provided by Odyssea, imagine a 29-year-old male refugee from Syria. Although he has been in Greece for 6 years and is a recognised refugee, he has spent most of his professional life in entry-level, low income, temporary job positions. He now wishes to start building a career for himself but is not sure which field would be most appropriate for him. After registering for Odyssea's services, its team of experts noticed that, although he has all the required legal documents he is not in a state to be employed, meaning that he lacks the skills, behavioral traits and professional expertise that would make him competitive and equipped to enter a professional environment.

As a first step, the beneficiary will enter the Soft Skills course, train on the essentials of professional behavior, create his digital footprint and prepare for the interview process. Although now ready to search for work, he does not have a clear view of the career he wishes to follow. In this case, the beneficiary will have the opportunity to follow a series of Introductory Courses to get a glimpse of the requirements and benefits of each professional sector that fits his personality and is currently relevant in the job market. Finishing this series of courses, he will now have a strong indication of what he wishes to do for a living, so he will be included in the Tailor Made course that best fits his goal and gain the knowledge that would make him the perfect candidate for hire in one of our collaborating companies in the sector. After finishing this course, he will be ready to be matched with an identified job position that fits his updated profile, education and newly gained professional expertise.

Epilogue

Odyssea's goal is to enable socially and financially vulnerable people to enter the world of work. All future efforts will be pointed towards working with vulnerable people, to guide and support them throughout their professional endeavors and to connect them with the market. Odyssea will focus on young people who have gone through its capacity building program and are empowered to pursue employment opportunities and those young people who have the skills to get a job but lack the opportunity to do so. Through Odyssea, more than 6000 young people will be supported within the next three years through connection with employers, and preparation to get a job and maintain it in the long-run.

To achieve this goal, Odyssea has invested in a concrete team of visionary, open-minded individuals, diverse but sharing the same vision; to create a world where all young people thrive by realizing their full potential.

Thodoris Kostoulas,
Academy Program Manager

NOTES FOR CONTRIBUTORS

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