

## Social Cohesion and Development

Vol 11, No 1 (2016)

# Κοινωνική Συνοχή και Ανάπτυξη

Εξαμηνιαία Επιστημονική  
Επιθεώρηση,  
Ανοιξη 2016, τόμος 11ος, τεύχος 1

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21

Biannual Scientific  
Review,  
Spring 2016, volume 11, issue 1

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## ΚΟΙΝΩΝΙΚΗ ΣΥΝΟΧΗ ΚΑΙ ΑΝΑΠΤΥΞΗ

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**ΣΚΟΠΟΣ.** Η Κοινωνική Συνοχή και Ανάπτυξη (ΚΣΑ) είναι μια εξαμηνιαία επιστημονική επιθεώρηση για την έρευνα και συζήτηση θεμάτων κοινωνικής πολιτικής, συνοχής και ανάπτυξης. Σκοπός της είναι η καλύτερη κατανόηση του ρόλου της κοινωνικής συνοχής στη σύγχρονη ανάπτυξη και προώθηση της κοινωνικής δικαιοσύνης στο εσωτερικό και μεταξύ των εθνών. Τα άρθρα που δημοσιεύονται καλύπτουν τα πεδία της ανάλυσης, του σχεδιασμού, της εφαρμογής των πολιτικών, της αξιολόγησης των αποτελεσμάτων τους, της συγκριτικής έρευνας, της ανάλυσης του ρόλου των διεθνών οργανισμών, των εθελοντικών, κοινωνικών, ιδιωτικών και τοπικών φορέων στην κοινωνική ανάπτυξη και πολιτική. Ειδικότερα, η Επιθεώρηση φιλοξενεί άρθρα που αντιπροσωπεύουν ευρύ φάσμα γνωστικών πεδίων, όπως εργασιακές σχέσεις και απασχόληση, φτώχεια και κοινωνικός αποκλεισμός, συντάξεις και κοινωνική ασφάλιση, υγεία και κοινωνική φροντίδα, εκπαίδευση και κατάρτιση, πολιτικές για το παιδί, την οικογένεια και τα φύλα, μετανάστευση, εγκληματικότητα, εταιρική κοινωνική ευθύνη, καθώς και δραστηριότητες του τρίτου τομέα και της κοινωνίας πολιτών. Η Επιθεώρηση φιλοξενεί επιστημονικά άρθρα, βιβλιοκριτικές και βιβλιοπαρουσιάσεις, σύντομες εκθέσεις ερευνητικών προγραμμάτων, είτε στα ελληνικά είτε στα αγγλικά. Ενθαρρύνει τη διεπιστημονική, συγκριτική και ιστορική προσέγγιση.

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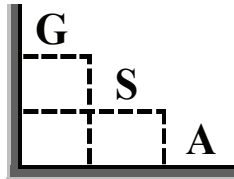


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## STATISTICAL REVIEW

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# Social Indicators and the Effectiveness of Social Transfers in Greece over the Recent Crisis

Maria Botsari and Theodoros Mitrakos, *Bank of Greece*

## Κοινωνικοί Δείκτες και η Αποτελεσματικότητα των Κοινωνικών Παροχών στην Ελλάδα κατά την Πρόσφατη Κρίση

Μαρία Μπότσαρη και Θεόδωρος Μητράκος, *Τράπεζα της Ελλάδας*

### ABSTRACT

In this paper we present key statistics on poverty, inequality and social exclusion in Greece and the eurozone over the crisis period 2009-2014. The data presented in this paper reveal that six years of economic recession and austerity in Greece have had a significant negative impact on rates of poverty and social exclusion, which have reached historically unprecedented and socially unacceptable high levels. Our data and analyses suggest that the Welfare State, one of the major functions of which is to redistribute income collected through taxation via social transfers, is the least effective in Greece, among all eurozone countries, in alleviating poverty and income inequality. Greece is ranked last in the Eurozone in terms of trust in government, freedom of choice, perceived levels of public sector corruption, and happiness, and third and second to last, respectively, in terms of trust in others and social support. We argue that the erosion of the social fabric and the perceived quality of the Greek climate of trust appear to be part of the story of Greece being the biggest happiness loser among 125 countries from 2005-2007 to 2012-2014.

**KEY WORDS:** Poverty, social exclusion, inequality, social transfers, effectiveness.

### ΠΕΡΙΛΗΨΗ

Στην εργασία αυτή παρουσιάζονται και αναλύονται βασικοί δείκτες σχετικοί με τη φτώχεια, την οικονομική ανισότητα και τον κοινωνικό αποκλεισμό στην Ελλάδα και την ευρωζώνη κατά την περίοδο της οικονομικής κρίσης 2009-2014. Τα διαθέσιμα στοιχεία δείχνουν ότι τα έξι έτη οικονομικής ύφεσης και λιτότητας στην Ελλάδα είχαν σημαντικές αρνητικές επιπτώσεις στα ποσοστά φτώχειας και κοινωνικού αποκλεισμού, τα οποία ανήλθαν σε ιστορικά πρωτοφανή και κοινωνικά μη αποδεκτά υψηλά επίπεδα. Τα στοιχεία και οι αναλύσεις της εργασίας καταδεικνύουν ότι το Κοινωνικό Κράτος, του οποίου μια από τις κύριες αποστολές είναι η αναδιανομή του εισοδήματος μέσω των κοινωνικών παροχών, είναι το λιγότερο αποτελεσματικό μεταξύ των χωρών της ευρωζώνης στη μείωση της φτώχειας και της εισοδηματικής ανισότητας. Η Ελλάδα κατατάσσεται τελευταία στην ευρωζώνη ως προς την εμπιστοσύνη στην κυβέρνηση, την ελευθερία επιλογών, την αντίληψη διαφθοράς στον δημόσιο τομέα και την υποκειμενική ευτυχία. Είναι, ακόμα, στις τελευταίες θέσεις ως προς την εμπιστοσύνη στους άλλους και την κοινωνική στήριξη. Θεωρούμε ότι η διάβρωση του κοινωνικού ιστού και η αρνητική αντίληψη του κλίματος εμπιστοσύνης στην Ελλάδα είναι δύο παράγοντες που συνέβαλαν σε μεγάλο βαθμό ώστε η Ελλάδα να καταγράψει τις μεγαλύτερες απώλειες στα επίπεδα υποκειμενικής ευτυχίας από την περίοδο 2005-2007 στην περίοδο 2012-2014 μεταξύ 125 χωρών παγκοσμίως.

**ΛΕΞΕΙΣ-ΚΛΕΙΔΙΑ:** Φτώχεια, κοινωνικός αποκλεισμός, ανισότητα, κοινωνικές παροχές, αποτελεσματικότητα.



## 1. Introduction

**P**overty, income inequality and well-being in general have significantly worsened in Greece in the last six years because of the deep recession caused by austerity measures. Not surprisingly, in 2014, Greece was the Eurozone country with the highest rate of people at risk of poverty or social exclusion across the age groups from birth to 54 years, the highest rate of people at risk of poverty, the highest level of inequality with respect to the S80/S20 index and with a level of inequality with respect to the Gini coefficient just one percentage point lower than its highest value recorded in Spain. Greece was also the biggest well-being loser among 125 countries from 2005-2007 to 2012-2014. Last but not least, Greece is ranked last in terms of the effectiveness of social protection expenditure in contributing to poverty reduction. The differences in poverty reduction effectiveness of social transfers across Member States suggest that factors other than the percentage of GDP spent on social protection influence poverty reduction outcomes.

Section 2 presents the main data source and discusses methodological issues. Section 3 presents key statistics on poverty and social exclusion across all age groups – inclusive of children from birth to 17 years of age – and across all educational attainment levels. Section 4 is devoted to income inequality as measured by the Gini coefficient and the S80/S20 index. The poverty reduction effectiveness of social transfers is the topic of Section 5, while Section 6 refers to indicators of subjective well-being which are increasingly considered proper measures of social progress and a goal of public policy. The final remarks and summary of the findings are provided in the concluding section.

## 2. Data and methodological issues

**T**he current study, presents comparisons of social indicators (risk of poverty, social exclusion, inequality etc.) between EU countries. Data are derived by Eurostat's database, comprising harmonized statistics and offer an objective portrayal of social and economic trends.<sup>1</sup> Some of these indicators are broken down by educational attainment level, age group or other socio-economic characteristics of the household head. However, as often mentioned in the relevant literature (Atkinson 1995; Cowell 1995), the design of social indicators has some weaknesses and methodological shortcomings. As early as 1920, Dalton was arguing that underlying any index of inequality there is some concept of social welfare (and, hence, a specific Social Welfare Function). Therefore, a comparison between the estimates of a particular index for two distributions involves an implicit or explicit normative judgment as to whether one distribution is to be preferred to another. Then, one can ask whether it is possible to rank unambiguously two distributions without using a specific index of inequality.

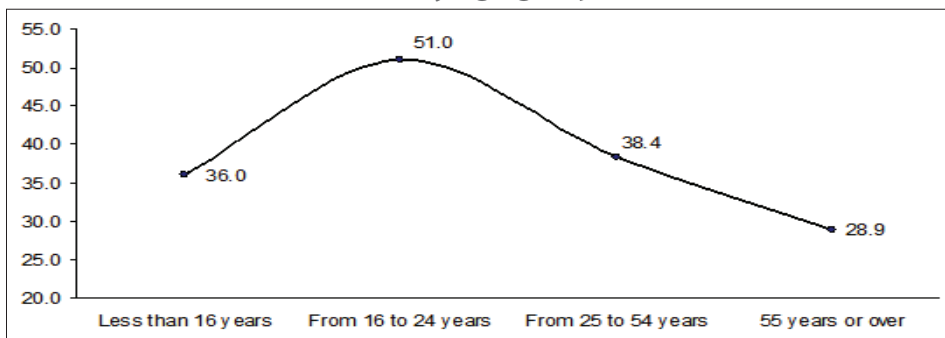
The Gini coefficient and the S80/S20 index which are used in the present study to measure income inequality satisfy the basic axioms of inequality measurement (symmetry, mean-independence, population-independence and the Dalton-Pigou principle of transfers) and are sensitive to different types of transfers. In comparison with most indices used in empirical studies, Gini is relatively more sensitive to transfers close to the middle of the distribution, while S80/S20 more sensitive to transfers close to the top or the bottom of the distribution. Hence, the combined use of these indices satisfies a different range of tastes regarding the responsiveness of an index to different types of transfers. Further, alternative poverty measures are also employed at this paper in order to moderate the weaknesses of social indicators.

The at-risk-of poverty rate derived from the percentage of households in the population with incomes less than 60 per cent of the median is the European Union headline measure of poverty which has been incorporated into the EU 2020 poverty and social exclusion target. However, the approach to poverty measurement based on relative income has been criticized, as it may underestimate poverty while cross-country comparisons of relative poverty measures such as the at risk of poverty rate have to be done carefully for a number of reasons (Bradshaw and Mayhew, 2010; Eurostat, 2013). Although data are collected in all European countries through a single instrument (EU-SILC), the full harmonization of the definition for each income component is difficult to reach. The risk of poverty threshold is related to the general level of income, and its distribution, over the whole population. This threshold may, therefore, change in various directions from one year to another when individual incomes change suddenly, as it has occurred since the beginning of the economic crisis in many countries. Then, the focus on the monetary side excludes from the concept some benefits in kind (education, health, childcare, etc.) which – depending on the relative generosity of national social systems – may have a different impact on the disposable income.

### 3. Poverty and Social Exclusion

As is evident from Table 1, in 2013 Greece was the Eurozone country with the highest rate of people at risk of poverty or social exclusion.<sup>2</sup> This rate rose further by 0.3 percentage points to 36% in 2014, showing a cumulative increase of more than 8 percentage points during the crisis period 2009-2014. Table 2 presents the percentage of total population at risk of poverty or social exclusion in the Eurozone by age group. Figure 1, which is based on the data in Table 2 for Greece, reveals an inverse U-shaped trend in the rates of people at risk of poverty or social exclusion across age groups, which is worrying to watch and calls for attention and policy consideration and reforms. As can be seen, youth aged from 16 to 24 years have seen the most severe deterioration in their income and living conditions. The rate of at risk of poverty or social exclusion for this age group in 2014 was by 35% to 75% higher than the corresponding rates for the other three age groups and has seen an increase of 18.8 percentage points since the beginning of the crisis in 2009. Moreover, in 2014, Greece recorded the largest gap, equal to 15 percentage points, between the at risk of poverty or social exclusion rate of youth aged from 16 to 24 years and that of total population.

**Figure 1: Rate of people at risk of poverty or social exclusion in Greece by age group, 2014**



Source: Eurostat.

**Table 1: Percentage of total population at risk of poverty or social exclusion in the eurozone, 2009-2014**

Country	Year					
	2009	2010	2011	2012	2013	2014
Netherlands	15.1	15.1	15.7	15.0	15.9	16.5
Finland	16.9	16.9	17.9	17.2	16.0	17.3
Slovakia	19.6	20.6	20.6	20.5	19.8	18.4
France	18.5	19.2	19.3	19.1	18.1	18.5
Luxembourg	17.8	17.1	16.8	18.4	19.0	19.0
Austria	19.1	18.9	19.2	18.5	18.8	19.2
Slovenia	17.1	18.3	19.3	19.6	20.4	20.4
Germany	20.0	19.7	19.9	19.6	20.3	20.6
Belgium	20.2	20.8	21.0	21.6	20.8	21.2
Malta	20.3	21.2	22.1	23.1	24.0	23.8
Estonia	23.4	21.7	23.1	23.4	23.5	26.0
Lithuania	29.6	34.0	33.1	32.5	30.8	27.3
Ireland	25.7	27.3	29.4	30.0	29.5	27.4
Cyprus	23.5	24.6	24.6	27.1	27.8	27.4
Portugal	24.9	25.3	24.4	25.3	27.5	27.5
Italy	24.9	25.0	28.1	29.9	28.5	28.3
Spain	24.7	26.1	26.7	27.2	27.3	29.2
Latvia	37.9	38.2	40.1	36.2	35.1	32.7
Greece	27.6	27.7	31.0	34.6	35.7	36.0

Source: Eurostat.

Tables 3 and 4 present the at risk of poverty or social exclusion rates by educational attainment level for population aged 18 and over and by parents' level of education for children aged 0-17 years, respectively. The data in Table 3 suggest that the at risk of poverty or social exclusion rate for population aged 18 and over is directly linked to the educational attainment level of the individuals: the less educated one is, the more likely one is to be at risk of poverty or social exclusion. Across the 18 countries of the Eurozone for which data are available for 2014, the at risk of poverty or social exclusion rate for individuals with pre-primary, primary and lower secondary education – equal to 33.2% – was by 11.5 percentage points greater than the corresponding rate for individuals with upper secondary and post-secondary non-tertiary education – equal to 21.7% – which in turn was by 9.2 percentage points greater than that for individuals with first and second stage of tertiary education – equal to 12.5%. As can be seen, Greece recorded the highest at risk of poverty or social exclusion rate among the Eurozone countries, the third highest rate after Latvia and Lithuania among those with pre-primary, primary and lower secondary education and the highest rates for the other two educational groups.

**Table 2: Percentage of total population at risk of poverty or social exclusion in the Eurozone by age group, 2014**

Country	Age group			
	Less than 16 years	From 16 to 24 years	From 25 to 54 years	55 years or over
Slovakia	23.4	21.1	17.6	15.8
Austria	23.8	21.2	17.5	18.3
Slovenia	17.6	21.5	18.7	24.2
Estonia	23.5	23.2	21.9	33.7
Germany	19.3	23.9	20.3	20.7
Malta	30.9	24.1	20.9	23.9
France	21.4	26.2	18.3	14.6
Luxembourg	25.7	26.2	18.1	12.5
Netherlands	17.0	26.2	17.0	11.9
Belgium	22.3	27.2	20.5	19.3
Finland	15.5	27.2	15.1	17.4
Lithuania	28.5	28.7	23.8	30.9
Cyprus	24.6	32.1	26.7	28.0
Latvia	34.5	32.7	28.6	37.1
Portugal	30.8	34.8	26.2	25.3
Italy	31.9	36.5	29.8	22.6
Spain	35.4	38.7	31.6	19.1
Ireland	29.1	41.6	26.1	21.2
Greece	36.0	51.0	38.4	28.9

Source: Eurostat.

As it follows from Tables 3 and 4, the risk of facing poverty or social exclusion is not only affected by the educational attainment of the individuals themselves, but also the educational attainment level of parents has an impact on their children's risk of falling in poverty or social exclusion. The association between parents' level of education and their children's risk of experiencing poverty or social exclusion is evident from Table 4, showing that the percentage of children living in a household at risk of poverty or social exclusion ranged from 15.6% in Finland to 36.7% in Greece. However, the total rate masks considerable variation across educational groups. While for parents with a qualification lower than upper secondary education the risk of their children facing poverty or social exclusion ranged from 42.8% in the Netherlands to 68.9% in Greece and 70.8% in Latvia, the corresponding rate for parents with tertiary education was much lower, ranging from 6.2% in Malta to 13.8% in Greece, 14.4% in Spain and 15.2% in Latvia. The situation is even more alarming when we look at children aged 0 through 6 years. Figure 2 reveals that 81.7% of Greek children from birth to the age of six, whose parents lack even an upper secondary qualification, live in poverty or social exclusion. It is clear that there is a strong negative relation between child poverty and their parents' level of education.

**Table 3: Percentage of population of the Eurozone countries aged 18 and over at risk of poverty or social exclusion in 2014 by educational attainment level**

Country	Levels 0-2	Levels 3-4	Levels 5-6	Total
Netherlands	18.7	18.7	11.0	16.2
Luxembourg	25.8	13.7	8.4	16.9
Slovakia	33.0	17.1	7.6	17.2
Finland	26.0	21.2	6.5	17.3
France	26.0	17.2	9.8	17.6
Austria	31.7	16.2	11.8	18.2
Belgium	35.0	19.3	10.0	20.5
Germany	39.6	21.9	12.5	20.7
Slovenia	37.4	21.4	8.0	21.0
Malta	30.1	13.1	5.3	22.1
Estonia	39.9	28.0	16.9	26.5
Portugal	32.2	19.7	10.8	26.6
Lithuania	42.9	30.8	10.0	27.0
Italy	34.6	23.5	15.4	27.5
Spain	34.9	27.6	15.3	27.8
Cyprus	40.8	29.5	14.4	28.1
Latvia	50.3	31.8	15.4	31.5
Greece	41.8	39.8	18.7	35.7

Source: Eurostat.

Note: Levels 0-2: pre-primary, primary and lower secondary education; levels 3-4: upper secondary and post-secondary non-tertiary education; levels 5-6: first and second stage of tertiary education. Empty cells indicate that data are not available.

**Table 4: Percentage of Children of the Eurozone Countries Aged 0-17 Years at Risk of Poverty or Social Exclusion in 2014 by Educational Attainment Level of their Parents**

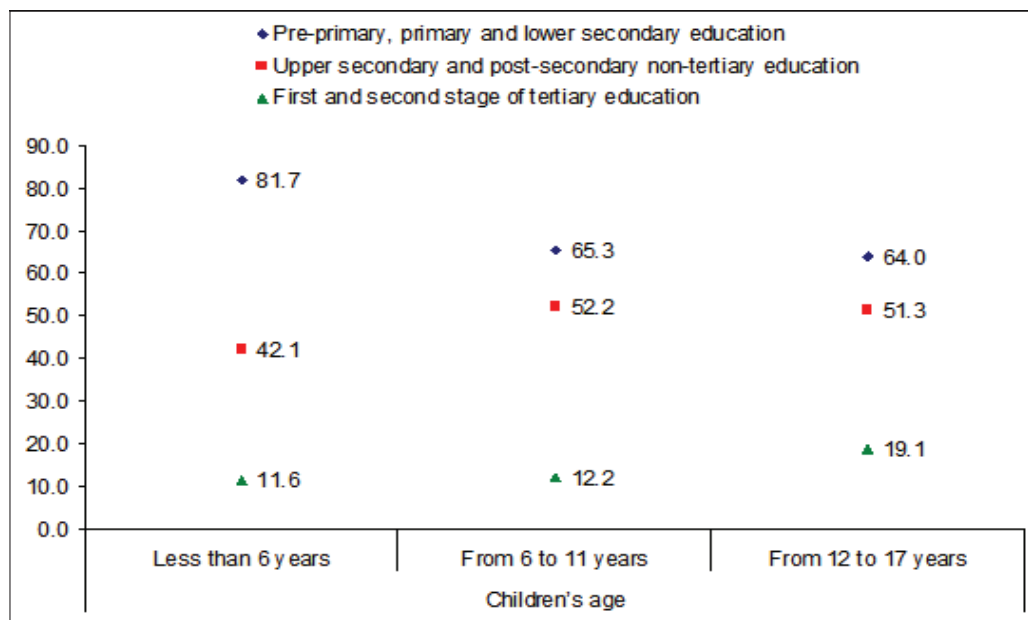
	Levels 0-2	Levels 3-4	Levels 5-6	Total
Finland	58.3	25.4	7.0	15.6
Netherlands	42.8	21.7	9.8	17.1
Slovenia	45.7	26.6	7.1	17.7
Germany	68.4	26.5	8.6	19.6
France	60.8	28.4	8.1	21.6
Belgium	64.3	30.6	9.2	23.2
Austria	65.4	23.6	12.8	23.3

	Levels 0-2	Levels 3-4	Levels 5-6	Total
Slovakia	93.5	24.5	11.7	23.6
Estonia	57.2	33.3	12.2	23.8
Cyprus	53.1	30.7	14.7	24.7
Luxembourg	53.1	23.2	9.8	26.4
Lithuania	68.6	43.1	8.8	28.9
Ireland				30.3
Malta	55.1	16.6	6.2	31.3
Portugal	48.1	23.2	7.0	31.4
Italy	58.5	29.6	13.0	32.1
Latvia	70.8	42.5	15.2	35.3
Spain	64.1	44.3	14.4	35.8
Greece	68.9	48.7	13.8	36.7

Source: Eurostat.

Table 5 displays the at-risk-of-poverty rates in the Eurozone countries over the period 2009-2014. We recall that risk of poverty is one of the three elements contributing to being at risk of poverty or social exclusion (see note 1). In 2014, the highest at risk of poverty rates were observed in Spain (22.2%), Greece (22.1%), Estonia (21.8%) and Latvia (21.2%) and the lowest in the Netherlands (11.6%), Slovakia (12.6%) and Finland (12.8%). This rate for Greece means that the disposable income of 22.1% of its population was below the national poverty threshold.<sup>3</sup> We should note at this point that the poverty threshold varies over time and has fallen in a number of Eurozone Member States in recent years due to the financial and economic crisis. Indeed, in Greece the median equivalized net income fell from € 8,377 in 2013 to € 7,680 in 2014. While the median equivalized net income dropped between 2013 and 2014 by 8.32%, so did the at risk of poverty rate which decreased by one percentage point, implying that a number of people in Greece who were around the poverty threshold in 2013 moved above it merely as a result of the lowering of the threshold caused by the fall in the median income, even if their situation did not significantly change in 2014.

**Figure 2: At Risk of Poverty or Social Exclusion Rates in Greece for Children Aged 0-17 Years by Educational Attainment Level of their Parents and Age Group, 2014**



Source: Eurostat.

To keep the poverty threshold fixed in real terms over a longer period of time in order to avoid misleading results in periods of rapid and general economic deterioration and therefore to control the effects of a moving poverty threshold, Eurostat calculates the at risk of poverty indicator anchored in time. Figure 3 illustrates the at risk of poverty rates in the Eurozone anchored in 2008; as can be seen, between 2009 and 2014 the largest increases were observed in Greece (154%) and Cyprus (92%), while Malta, Finland and Austria reported decreases. With 48% in 2014, Greece was the country with the worst performance in this indicator as well, followed by Cyprus and Latvia which reported also high rates, but 16.7 and 20 percentage points, respectively, lower than that of Greece. Notably, Greece witnessed an additional increase of 3.7 percentage points in this indicator between 2013 and 2014, while, with the exception of Cyprus that also witnessed a high increase of 8 percentage points, for all other Eurozone countries the at risk of poverty rate anchored in 2008 either decreased or increased by at most 3.2 percentage points (in Spain).

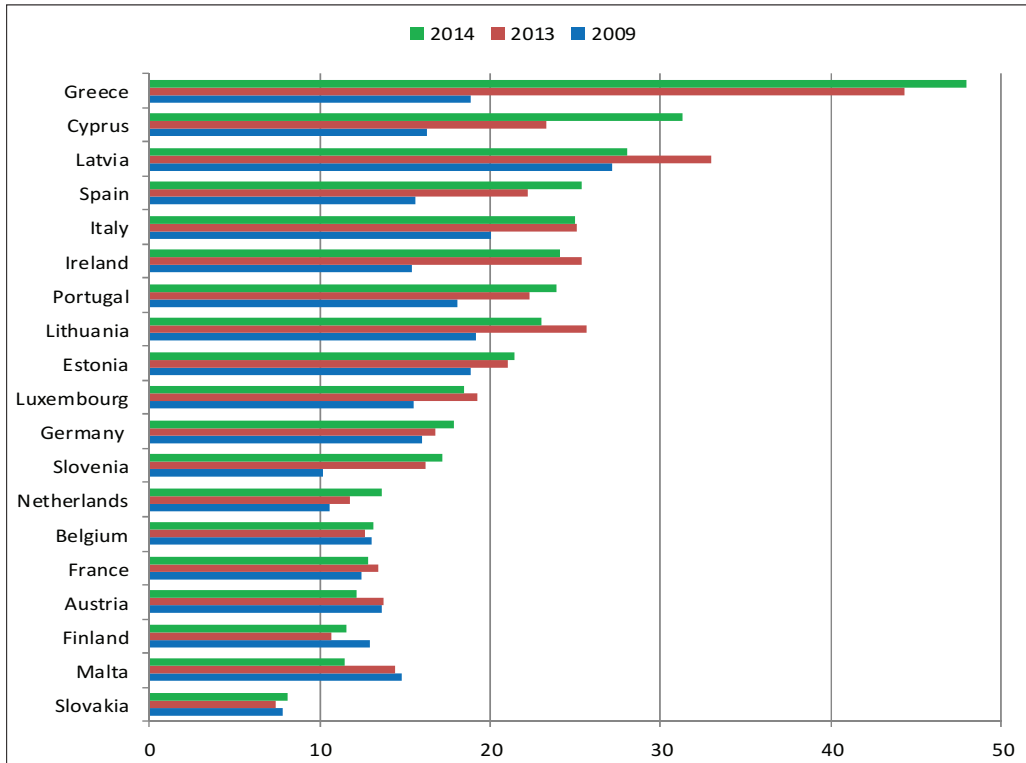
**Table 5: At Risk of Poverty Rates in the Eurozone, 2009-2014**

	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>
<b>Netherlands</b>	11.1	10.3	11.0	10.1	10.4	11.6
<b>Slovakia</b>	11.0	12.0	13.0	13.2	12.8	12.6
<b>Finland</b>	13.8	13.1	13.7	13.2	11.8	12.8
<b>France</b>	12.9	13.3	14.0	14.1	13.7	13.3
<b>Austria</b>	14.5	14.7	14.5	14.4	14.4	14.1
<b>Cyprus</b>	15.8	15.6	14.8	14.7	15.3	14.4
<b>Slovenia</b>	11.3	12.7	13.6	13.5	14.5	14.5
<b>Ireland</b>	15.0	15.2	15.2	15.7	14.1	15.3
<b>Belgium</b>	14.6	14.6	15.3	15.3	15.1	15.5
<b>Malta</b>	14.9	15.5	15.6	15.1	15.7	15.9
<b>Luxembourg</b>	14.9	14.5	13.6	15.1	15.9	16.4
<b>Germany</b>	15.5	15.6	15.8	16.1	16.1	16.7
<b>Lithuania</b>	20.3	20.5	19.2	18.6	20.6	19.1
<b>Portugal</b>	17.9	17.9	18.0	17.9	18.7	19.5
<b>Italy</b>	18.4	18.2	19.6	19.4	19.1	19.6
<b>Latvia</b>	26.4	20.9	19.0	19.2	19.4	21.2
<b>Estonia</b>	19.7	15.8	17.5	17.5	18.6	21.8
<b>Greece</b>	19.7	20.1	21.4	23.1	23.1	22.1
<b>Spain</b>	20.4	20.7	20.6	20.8	20.4	22.2

Source: Eurostat.



Figure 3: At Risk of Poverty Rates in the Eurozone Anchored at 2008



Source: Eurostat.

## 4. Income Inequality

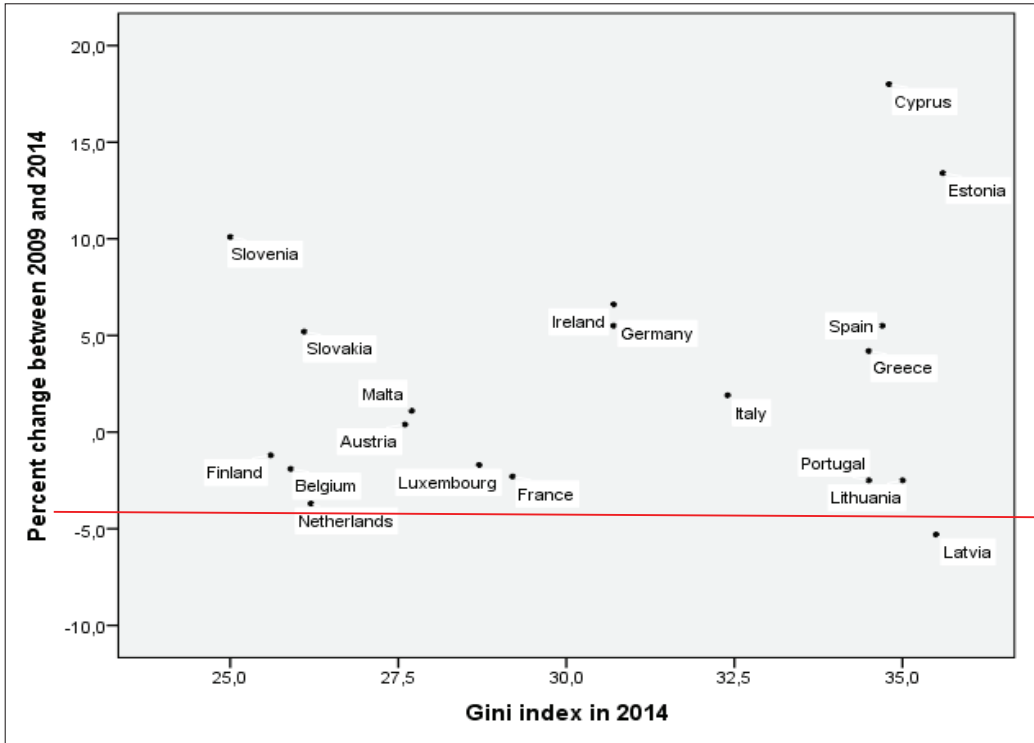
As follows from the data in Table 6, income inequality, as measured by the Gini coefficient, varied substantially among the Eurozone countries in 2014, being as low as about 25 in Slovenia and Finland and as high as about 35 in Greece, Portugal, Spain, Cyprus, Lithuania, Latvia and Estonia (on a scale from 0 to 100). From 2013 to 2014, the Gini coefficient remained almost stable in Greece, as in most of the Eurozone countries, while, where increases are observed, these do not exceed one unit with the exception of Estonia, Cyprus and Slovakia. Figure 4 shows the Gini value in 2014 plotted against its rate of change between 2009 and 2014. It can be seen that almost half of the Eurozone countries saw increases in income inequality over the period 2009-2014, while the other half of them saw decreases. The biggest increases were recorded in Cyprus (18%), Estonia (13.4%) and Slovenia (10.1%). Latvia and the Netherlands, with a 5.3% and 3.7%, respectively, decrease in the Gini coefficient, are the countries which managed to reduce inequality more than any other country in the Eurozone.

**Table 6: Gini Coefficient in the Eurozone, 2010-2014**

Country	2009	2010	2011	2012	2013	2014
Slovenia	22.7	23.8	23.8	23.7	24.4	25.0
Finland	25.9	25.4	25.8	25.9	25.4	25.6
Belgium	26.4	26.6	26.3	26.5	25.9	25.9
Slovakia	24.8	25.9	25.7	25.3	24.2	26.1
Netherlands	27.2	25.5	25.8	25.4	25.1	26.2
Austria	27.5	28.3	27.4	27.6	27.0	27.6
Malta	27.4	28.6	27.2	27.1	27.9	27.7
Luxembourg	29.2	27.9	27.2	28.0	30.4	28.7
France	29.9	29.8	30.8	30.5	30.1	29.2
Germany	29.1	29.3	29.0	28.3	29.7	30.7
Ireland	28.8	30.7	29.8	29.9	30.0	30.7
Italy	31.8	31.7	32.5	32.4	32.8	32.4
Greece	33.1	32.9	33.5	34.3	34.4	34.5
Portugal	35.4	33.7	34.2	34.5	34.2	34.5
Spain	32.9	33.5	34.0	34.2	33.7	34.7
Cyprus	29.5	30.1	29.2	31.0	32.4	34.8
Lithuania	35.9	37.0	33.0	32.0	34.6	35.0
Latvia	37.5	35.9	35.1	35.7	35.2	35.5
Estonia	31.4	31.3	31.9	32.5	32.9	35.6

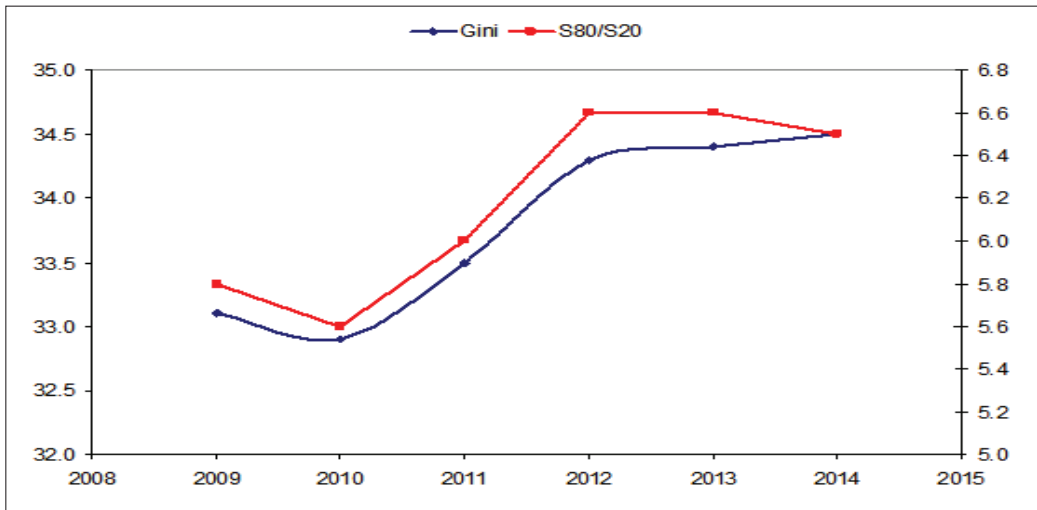
Source: Eurostat.

Figure 4: Rate of Change of the Gini Coefficient in the Eurozone, 2009-2014



Similar results are derived from another indicator of income inequality used to monitor social cohesion in the European Union: the income quintile share ratio (S80/S20), that is the ratio of total (equivalized) disposable income received by the top 20% of the population to that received by the bottom 20%. Leventi and Matsaganis (2013) note that the Gini coefficient is highly sensitive to inequalities in the middle of the income distribution, whereas the S80/S20 index is sensitive to changes at the two ends of the distribution. With a value of about 6.5, Estonia, Greece, Latvia and Spain had the highest level of inequality in 2014 in terms of the S80/S20 index, meaning that 20% of the population with the highest equivalized disposable income received approximately 6.5 times as much income as 20% of the population with the lowest equivalized disposable income. Figure 5 clearly shows that both the Gini coefficient and the S80/S20 index reflect very similar trends in income inequality in the case of Greece.

Figure 5: Evolution of Inequality in Greece Over the Period 2009-2014



Source: Eurostat.

## 5. Social Transfers as a Means of Alleviating Poverty and Inequality

Social transfers<sup>4</sup> were introduced long ago in many countries as a social policy tool which, if used effectively, would prevent and alleviate poverty and inequality. More recently, social transfers have been highlighted as an economic stabilizer for the effect of the crisis (Department of Social Protection, 2014). To evaluate the effects of social policy regarding the poor social groups and to measure the impact of social transfers on reducing the share of persons at risk of poverty, the at risk of poverty rate before social transfers is commonly used. This indicator measures a hypothetical situation where social transfers are absent (pensions not being considered as a social transfer). Comparing this with the standard at risk of poverty rate (after social transfers) enables to assess the redistributive effect that such transfers have in helping to reduce the number of people who are at risk of poverty. As a key role of social transfers is to alleviate poverty, their performance in reducing poverty has been a topic of intense research and academic debate (e.g. Herrmann, Tausch, Heshmati, and Bajalan, 2008; Tausch, 2011; Watson and Maître, 2013).

An index commonly used to evaluate social transfers' performance in cushioning people from the worst effects of rising unemployment and falling incomes is poverty reduction effectiveness, which refers to the extent to which social transfers achieve the goal of reducing poverty and is given by:

$$(AROP_b - AROP_a) / AROP_b$$

where  $AROP_b$  is the at risk of poverty rate before social transfers (pensions excluded from social transfers) and  $AROP_a$  is the at risk of poverty rate after social transfers (Watson and Maître, 2013). Table7 presents the social protection expenditure in % GDP, the  $AROP_b$ , the  $AROP_a$ ,

and the poverty reduction effectiveness of social transfers in the Eurozone in 2012 (pensions excluded from social transfers). The Pearson  $r$  correlation between social protection expenditure and poverty reduction effectiveness of social transfers was found equal to 0.65,  $p = 0.003$ . These figures represent a highly significant strong relation despite the very small sample size ( $N = 19$  Eurozone countries). The correlation between social protection expenditure and the at risk of poverty rate was found moderately negative ( $r = -0.40$ ) and statistically significant at the  $p = 0.10$  level. The data in Table 8 show that, with a 13.8%, Greece is ranked last among Eurozone countries in terms of poverty reduction effectiveness. Figure 6 illustrates the scatterplot of poverty reduction effectiveness versus social protection expenditure. Below the trend line are countries for which social transfers are less effective in alleviating income poverty than would be predicted from their social protection expenditure. Note that all countries of the European South find themselves below the trend line, indicating that poverty reduction is lower than what should be expected from their level of social transfers. Greece, being the country which falls the most below the regression line, seems to represent a special outlier case.

These findings are consistent with the data in Table 8, which presents Gini coefficient in the Eurozone before and after social transfers (pensions excluded from social transfers). As is evident in Table 9, social transfers do attenuate income inequality but they have different degrees of impact in reducing inequality across countries. With a 32.7% decrease in the Gini coefficient before and after social transfers in 2014, Ireland heads by far the list. Finland, Belgium, Slovenia, Luxembourg and Netherlands have also seen high decreases, all above 20%. At the other end of the list, Greece recorded the smallest percentage decrease in the Gini coefficient after inclusion of social transfers among the income sources, followed by Italy, Cyprus, Latvia and Estonia. In these countries, inequality was reduced by less than 10%. Figure 7 highlights the underperformance of the Social State in reducing income inequality in the countries of the European South, as all these countries fall below the trend line.

**Table 7: Social Protection Expenditure in % GDP, AROPb, AROPa, and Poverty Reduction Effectiveness of Social Transfers, 2012**

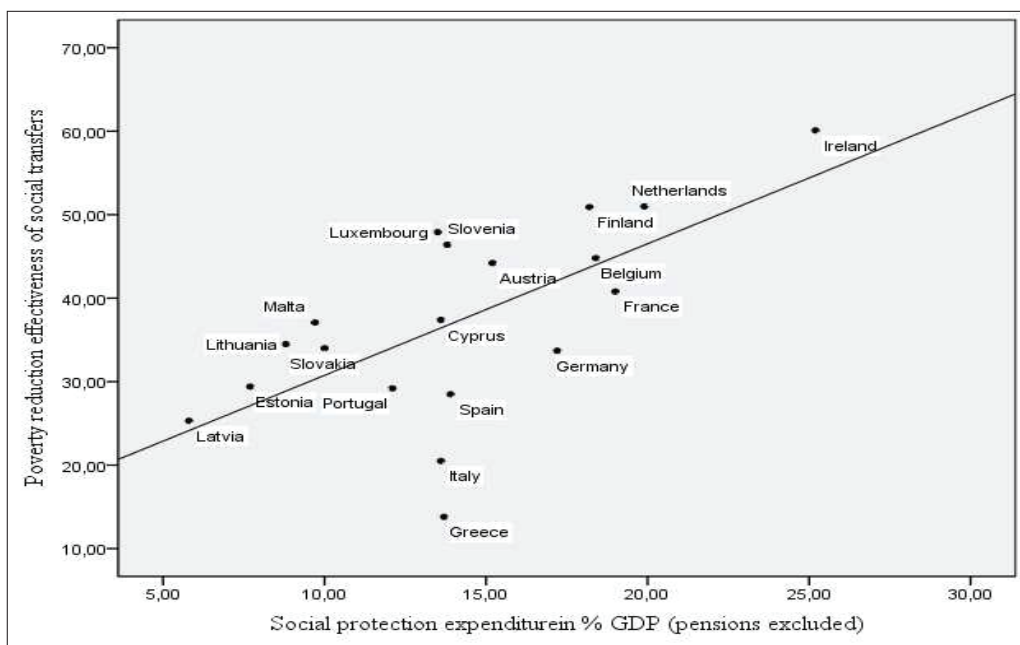
	Social protection expenditure in % GDP	AROPb	AROPa	Poverty reduction effectiveness of social transfers
Ireland	25.2	39.3	15.7	60.1
Finland	18.2	26.9	13.2	50.9
Belgium	18.4	27.7	15.3	44.8
Netherlands	19.9	20.6	10.1	51.0
Lithuania	8.8	28.4	18.6	34.5
Estonia	7.7	24.8	17.5	29.4
Austria	15.2	25.8	14.4	44.2
Luxembourg	13.5	29.0	15.1	47.9
Slovenia	13.8	25.2	13.5	46.4
Slovakia	10.0	20.0	13.2	34.0

	Social protection expenditure in % GDP	AROPb	AROPa	Poverty reduction effectiveness of social transfers
France	19.0	23.8	14.1	40.8
Cyprus	13.6	23.5	14.7	37.4
Germany	17.2	24.3	16.1	33.7
Latvia	5.8	25.7	19.2	25.3
Spain	13.9	29.1	20.8	28.5
Malta	9.7	24.0	15.1	37.1
Portugal	12.1	25.3	17.9	29.2
Italy	13.6	24.4	19.4	20.5
Greece	13.7	26.8	23.1	13.8

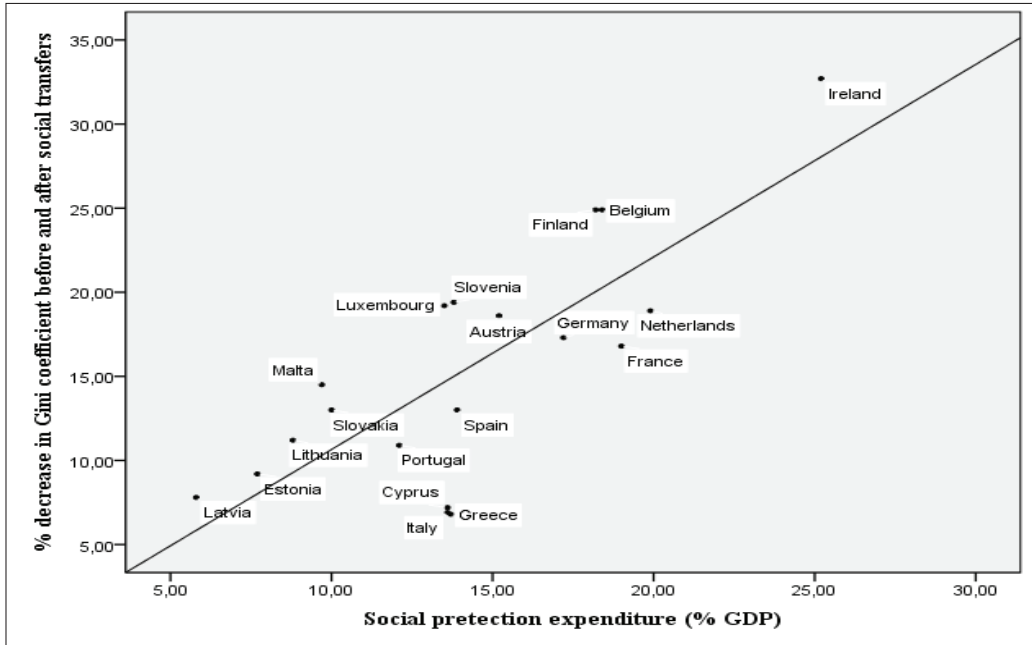
Note: Pensions are excluded from social transfers and social protection expenditure. Administrative and other costs are included in social protection expenditure.

Source: Authors' calculations based on Eurostat data.

**Figure 6: Scatterplot of Poverty Reduction Effectiveness versus Social Protection Expenditure**



**Figure 7 Scatterplot of Percentage Change of Gini Coefficient After Social Transfers versus Social Protection Expenditure**



Note: Pensions are excluded.

It has been argued (World Bank, 1997) that social assistance may be less effective at alleviating poverty, due primarily to poor targeting and inadequate transfer amounts for those most in need. Table 9 presents the means-tested and non means-tested social benefits in % of the GDP for EU-28 and the Eurozone countries in 2012, the most recent year for which data are available for all countries. Eurostat distinguishes means-tested and non means-tested benefits. A means test is a determination of whether an individual or family is eligible for government assistance, based upon whether the individual or family possesses the means to do without that help. The social benefits expenditure in Table 9 covers the functions of sickness/healthcare, disability, family/children, unemployment, housing and social exclusion benefits not elsewhere classified. The data in Table 9 show that Greece's total expenditure in 2012 on these functions (in percent of GDP) was by 2.2 percentage points below the EU-28 average but almost half than that of Ireland. Note also that the means-tested benefits in Greece, as a percentage of total benefits on these functions, is only 9.7% compared with 13.0% in the EU-28 and 30.4% in Ireland.

**Table 8 Gini Coefficient Before and After Social Transfers in the Eurozone (pensions excluded from social transfers) in 2012 and in 2014**

Country	2014			2012		
	Gini coefficient before social transfers	Gini coefficient after social transfers	% decrease	Gini coefficient before social transfers	Gini coefficient after social transfers	% decrease
Ireland	45.6	30.7	32.7	46.0	29.9	35.0
Belgium	34.5	25.9	24.9	35.1	26.5	24.5
Finland	34.1	25.6	24.9	34.2	25.9	24.3
Slovenia	31.0	25.0	19.4	30.1	23.7	21.3
Luxembourg	35.5	28.7	19.2	35.3	28.0	20.7
Netherlands	32.3	26.2	18.9	32.0	25.4	20.6
Austria	33.9	27.6	18.6	33.6	27.6	17.9
Germany	37.1	30.7	17.3	34.5	28.3	18.0
France	35.1	29.2	16.8	36.0	30.5	15.3
Malta	32.4	27.7	14.5	31.8	27.1	14.8
Spain	39.9	34.7	13.0	38.7	34.2	11.6
Slovakia	30.0	26.1	13.0	29.1	25.3	13.1
Lithuania	39.4	35.0	11.2	37.7	32.0	15.1
Portugal	38.7	34.5	10.9	38.7	34.5	10.9
Estonia	39.2	35.6	9.2	35.9	32.5	9.5
Latvia	38.5	35.5	7.8	38.8	35.7	8.0
Cyprus	37.5	34.8	7.2	34.1	31.0	9.1
Italy	34.8	32.4	6.9	34.6	32.4	6.4
Greece	37.0	34.5	6.8	36.6	34.3	6.3

Source: Eurostat.

**Table 9 Means-Tested and Non Means-Tested Social Benefits Expenditure for EU-28 and the Eurozone, in % of the GDP, 2012**

Country	2014			2012		
	Gini coefficient before social transfers	Gini coefficient after social transfers	% decrease	Gini coefficient before social transfers	Gini coefficient after social transfers	% decrease
Ireland	45.6	30.7	32.7	46.0	29.9	35.0
Belgium	34.5	25.9	24.9	35.1	26.5	24.5
Finland	34.1	25.6	24.9	34.2	25.9	24.3



Country	2014			2012		
	Gini coefficient before social transfers	Gini coefficient after social transfers	% decrease	Gini coefficient before social transfers	Gini coefficient after social transfers	% decrease
Luxembourg	35.5	28.7	19.2	35.3	28.0	20.7
Netherlands	32.3	26.2	18.9	32.0	25.4	20.6
Austria	33.9	27.6	18.6	33.6	27.6	17.9
Germany	37.1	30.7	17.3	34.5	28.3	18.0
France	35.1	29.2	16.8	36.0	30.5	15.3
Malta	32.4	27.7	14.5	31.8	27.1	14.8
Spain	39.9	34.7	13.0	38.7	34.2	11.6
Slovakia	30.0	26.1	13.0	29.1	25.3	13.1
Lithuania	39.4	35.0	11.2	37.7	32.0	15.1
Portugal	38.7	34.5	10.9	38.7	34.5	10.9
Estonia	39.2	35.6	9.2	35.9	32.5	9.5
Latvia	38.5	35.5	7.8	38.8	35.7	8.0
Cyprus	37.5	34.8	7.2	34.1	31.0	9.1
Italy	34.8	32.4	6.9	34.6	32.4	6.4
Greece	37.0	34.5	6.8	36.6	34.3	6.3

Source: Eurostat.

Further, a  $k$ -means cluster analysis was conducted to identify different groups of countries within the Eurozone according to their decrease of the Gini coefficient after social transfers (Table 8), the effectiveness of social transfers in alleviating poverty (Table 7), the mean-tested benefits (Table 9) and total social expenditure (pensions excluded) (Table 7). The number of clusters to detect was specified by the rule of thumb  $k \approx \sqrt{19/2} \approx 3$ . Table 10 shows the three clusters that were identified along with the means of the above variables for each group. On the basis of the aforementioned means, these clusters can be characterized as very high, medium-to-high, and low performing. The low performing cluster included the countries of Southern (Greece, Italy, Spain, Portugal) and Eastern Europe (Estonia, Latvia, Lithuania, Slovakia). The very high performing cluster comprised solely of Ireland. The medium-to-high performing cluster included all other countries. Similar results were obtained in the study of Watson and Maître (2013).

**Table 10 Classification of the eurozone countries according to the decrease of the Gini coefficient after social transfers, the effectiveness of social transfers in alleviating poverty, the mean-tested benefits and total social expenditure (pensions excluded), 2012**

Cluster	Decrease of the Gini coefficient	Effectiveness	Means-tested benefits	Total social expenditure
Low performing				
Greece, Italy, Spain, Portugal, Estonia, Latvia, Lithuania, Slovakia	10.1	26.9	9.2	10.7
Medium-to-high performing				
Belgium, Germany, France, Cyprus, Luxembourg, Malta, Netherlands, Austria, Slovenia, Finland	18.7	43.4	14.8	15.9
Very high performing				
Ireland	35.0	60.1	30.4	25.2

Note: Decrease of the Gini coefficient = % decrease after social transfers. Mean-tested benefits = % of total benefits. Total social expenditure = % GDP. The numbers are mean values for each cluster.

## 6. Well-Being Indicators

Following the UN General Assembly resolution adopted in July 2011, inviting member countries to measure the happiness of their people and to use this to help guide their public policies, happiness is increasingly considered a proper measure of social progress and a goal of public policy (Helliwell, Layard, and Sachs, 2015). According to OECD (2013b), happiness – alternatively, well-being, life satisfaction, or subjective utility (Easterlin, 2003) – encompasses three different aspects: cognitive evaluations of one’s life, positive emotions (joy, pride), and negative ones (pain, anger, worry). OECD (2013b) notes that, while these aspects of subjective well-being have different determinants, in all cases these determinants go well beyond people’s income and material conditions. World Happiness Reports (Helliwell et al., 2012, 2013, 2015) assess happiness using the “Cantril Ladder”, or “Cantril’s Ladder of Life Scale”, as adopted in the Gallup World Poll (Bjørnskov, 2010): *“Please imagine a ladder with steps numbered from zero at the bottom to ten at the top. Suppose we say that the top of the ladder represents the best possible life for you and the bottom of the ladder represents the worst possible life for you. If the top step is 10 and the bottom step is 0, on which step of the ladder do you feel you personally stand at the present time?”*. Eurostat developed a module on well-being for the 2013 wave of the EU-SILC which measures life satisfaction on an 11-point scale, from 0 (“not satisfied at all”) to 10 (“fully satisfied”). Eurostat conceptualized this variable as the respondent’s opinion/feeling about the degree of satisfaction with his/her life.

In searching for the determinants of happiness, researchers estimate a regression equation in which they use six key explanatory variables: GDP per capita, social support, healthy life expectancy,

freedom to make life choices, generosity, and freedom from corruption. Taken together, these six variables explain almost three-quarters of the variation in national annual average ladder scores among countries (Helliwell et al., 2015). Economists and policy-makers often present per capita GDP as the principal indicator of well-being. However, a number of thinkers have begun to challenge the dominance of GDP in explaining well-being, as GDP statistics ignore wealth variation, international income flows, household production of services, and other elements which are important determinants of well-being, while, on the other hand, GDP increases when convivial reciprocity is replaced by anonymous market relations and when rising crime, pollution, catastrophes, or health hazards trigger defensive or repair expenditures (Fleurbaey, 2009; Harvie, Slater, Philp, and Wheatley, 2008). Thus, scholars and important institutions such as the OECD, the United Nations Development Programme (UNDP) and the European Union have sought to develop composite indicators as alternatives to GDP, the most famous among them being the Human Development Index (HDI<sup>5</sup>), which combines GDP per capita with two other indicators - literacy or years of schooling and average life expectancy - into a single index (Harvie et al., 2008).

The findings of the 2013 World Happiness Report (Helliwell et al., 2013) revealed that the countries badly hit by the Eurozone financial crisis – Portugal, Italy, Spain and Greece – have suffered significant well-being losses from 2005-2007 to 2010-2012. Among the countries which showed decreases in average happiness over this period, Greece ranks second, Spain sixth, Italy eighth and Portugal twentieth. In the more recent 2015 World Happiness Report for the period 2012-2014 (Helliwell et al., 2015), with almost 1.5 points down from 2005-2007 to 2012-2014 Greece is the biggest happiness loser among 125 countries. Notably, while over the period 2010-2012 Greece was ranked seventieth among 156 countries, having fallen from 2012 to 2014 down to the 102th place among 106 countries. Helliwell et al. (2013) note that Greece stands out from the other countries in having the largest changes in life evaluations, beyond what can be explained by average responses to the economic crisis. They argue that, if trust levels are sufficiently high and the institutional fabric sufficiently strong, then the crisis may even lead to higher subjective well-being, while, should social institutions prove inadequate in the face of the challenges posed by the crisis, they may crumble further under the resulting pressures, making the happiness losses even greater, since social and institutional trust are themselves important supports for subjective well-being.

The argument of Helliwell et al. (2013) is supported by the data in Table 11. There can be seen that Greece is ranked last among all the Eurozone countries with respect to trust in government, freedom of choice, perceived levels of public sector corruption and happiness. Concerning trust in others and social support, Greece occupies the third and second to last position, respectively. The erosion of the social fabric and the perceived quality of the Greek climate of trust appear to be part of the story of the very big happiness losses.

**Table 11 Perceptions of Well-Being in the Eurozone**

	Having someone to rely on	Trust in others	Trust in government	Freedom of choice	CPI	Happiness
<b>Finland</b>	97.5	58	60	91	89	7.4
<b>Netherlands</b>	93.4	46	57	87	83	7.3
<b>Luxembourg</b>	84.7	26	74	91	80	6.9
<b>Germany</b>	96.1	31	52	90	78	6.7

	Having someone to rely on	Trust in others	Trust in government	Freedom of choice	CPI	Happiness
<b>Belgium</b>	91.8	30	44	82	75	6.9
<b>Ireland</b>	96.9	30	35	90	72	6.9
<b>France</b>	92.3	20	44	83	71	6.5
<b>Austria</b>	96.9	29	38	90	69	7.2
<b>Estonia</b>	95.5	33	27	65	68	5.4
<b>Cyprus</b>	93.7	11	34	69	63	5.6
<b>Portugal</b>	87.7	27	23	73	62	5.1
<b>Spain</b>	95.8	22	34	74	59	6.3
<b>Lithuania</b>	96.4	25	15	46	57	5.8
<b>Slovenia</b>	97.1	15	24	89	57	5.8
<b>Malta</b>	96.5	16	50	82	56	6.3
<b>Latvia</b>	89.3	13	19	51	53	5.0
<b>Slovakia</b>	98.6	21	37	53	47	5.9
<b>Italy</b>	85.7	20	28	55	43	5.9
<b>Greece</b>	86.6	16	13	36	40	4.8

*Notes and sources:* Having someone to rely on: percentage of the population answering “yes” to the EU-SILC 2013 question about having someone to rely on in case of need; only relatives and friends (or neighbors) who don’t live in the same household are considered. Trust in other people: percentage of respondents answering “can be trusted” to the Gallup World Poll question, “Generally speaking, would you say that most people can be trusted or that you have to be careful in dealing with people?”; data were obtained from the 2014 Human Development and refer to the most recent year available during the period 2009-2011. Trust in government: percentage of respondents answering “yes” to the Gallup World Poll question, “In this country, do you have confidence in the national government?”; Data were obtained from the 2014 Human Development and refer to the most recent year available during the period 2007-2012. Freedom of choice: percentage of respondents answering “satisfied” to the Gallup World Poll question, “In this country, are you satisfied or dissatisfied with your freedom to choose what you do with your life?”; data were obtained from the 2014 Human Development and refer to the most recent year available during the period 2007-2012). HDI: Human Development Index; data were obtained from the 2014 Human Development and refer to year 2013. CPI: Corruption Perceptions Index, which measures the perceived levels of public sector corruption on a scale of 0-100, where 0 means that a country is perceived as highly corrupt and 100 means it is perceived as very clean; data were obtained from the 2013 Corruption Perceptions Index and refer to year 2013. Happiness: average Cantril Ladder score; data were obtained from the 2015 World Happiness Report and refer to the period 2012-2014.

## 7. Conclusion

The data presented in this paper reveal that six years of economic recession and austerity in Greece have had a significant negative impact on rates of poverty and social exclusion, which have reached historically unprecedented and socially unacceptable high levels. These data show also that Greece is ranked last among all the Eurozone countries with respect to trust in

government, freedom of choice, perceived levels of public sector corruption and happiness, and almost last with respect to trust in others and social support. Our analyses have further revealed that the Welfare State, one of the major functions of which is to redistribute income collected through taxation via social transfers, is the least effective in Greece among all Eurozone countries in alleviating poverty and income inequality.

Several recent papers have attempted to assess how well the social transfers fulfill the role of alleviating poverty (Longford and Nicodemo, 2010). According to Gouveia et al. (2014), the ideal is that, if all social transfers were discarded there would be an appreciable level of poverty, but when the social transfers are regarded as a component of household income, poverty is greatly reduced. The poverty reduction effectiveness of social transfers which has become a topic of intense research and policy attention in recent years, describes how close the current allocation is to this ideal (e.g., Heady, Mitrakos and Tsakoglou, 2001; Longford and Nicodemo, 2010; Watson and Maître, 2013). Large differences are observed among the countries of the Eurozone in social protection expenditure as a percentage of GDP which, in 2012, was about or above 20% in Ireland (25.2%), Netherlands (19.9%) and France (19%), and below 15% in the countries of Southern and Eastern Europe (pensions excluded from social protection expenditure). Longford and Nicodemo (2010) comment that these differences reflect differences in living standards, but are also indicative of the diversity of the social protection systems and of the demographic, economic, social and institutional structures specific to each country.

Consistent with the results obtained in studies examining the relationship between social protection expenditure and poverty rates (Behrendt, 2002; Gouveia et al., 2014; Nolan et al., 2010), this paper points to a moderate negative correlation between poverty and social protection expenditure in the Eurozone and to a strong positive correlation between poverty reduction effectiveness of social transfers and social protection expenditure. However, significant differences across Member States have been uncovered. Although comparing the poverty reduction effectiveness of social transfers is not easy, because some countries spend more on social protection than others and countries use different instruments (Longford and Nicodemo, 2010), the findings of the present study suggest that the impact of social transfers in alleviating poverty is weakest in the Southern Europe Member States (Greece, Spain, Italy and Portugal). In contrast, more than half of those at risk of poverty in Ireland (60.1%), the Netherlands (51%) and Finland (50.9%) were removed in 2012 from this risk as a result of social transfers. Moreover, our results show that all countries of the European South are quite below the line representing the estimated average relationship between poverty reduction effectiveness and social protection expenditure (Figure 6), suggesting that the poverty gain achieved with social protection expenditure is lower than what should be expected from their level of social transfers or what should be expected for a Eurozone member state. In addition, as there are countries achieving larger gains than expected on the basis of their social protection expenditure, we argue that there is room for effectiveness improvements in social protection policies.

In conclusion, our results indicate that social transfers seem to reduce poverty and inequality in all Eurozone countries, with the reduction being strongly and positively associated to the percentage of GDP spent on social protection, but the impact of transfers seem to be more of a lack of high social protection expenditure in countries with the highest percentage of GDP devoted to social spending.

Watson and Maître (2013) caution what might seem like 'ineffectiveness' with respect to poverty reduction may well be a by-product of designing social transfers to address other goals

such as promoting work, enhancing social involvement or encouraging skills development. In many cases, it will be necessary to balance the goal of increasing poverty reduction efficiency against other aims of policy. However, in view of the fact that the means-tested benefits (pensions excluded) in Greece, as a percentage of total benefits on these functions, is by almost 40% lower than that of the EU-28 and less than one third of that of Ireland, we believe that a more widespread adoption of means-tested allocation of benefits and the implementation of a more targeted and fairer system of social transfers could increase poverty reduction effectiveness.

## Notes

1. Eurostat collects data from national statistical institutes. The statistics are harmonized according to Eurore-wide methodologies and therefore the data are genuinely comparable across member states.
2. At risk of poverty or social exclusion refers to the situation of people either at risk of poverty, or severely materially deprived or living in a household with a very low work intensity.
3. Poverty threshold, also called poverty line, is the minimum income level below which a person is officially considered to lack adequate subsistence and to be living in poverty. Absolute thresholds are fixed at a point in time and updated solely for price changes. In contrast, relative thresholds, as commonly defined, are developed by reference to the actual expenditures (or income) of the population. The poverty threshold is usually set at 60 % of the national median equivalized disposable income (after social transfers). The equivalized income is calculated by dividing the total household income by its size determined after applying the following weights: 1.0 to the first adult, 0.5 to each other household members aged 14 or over and 0.3 to each household member aged less than 14 years old.
4. According to EU-SILC, expenditure on social protection includes social benefits, administration costs and other expenditure. Social protection benefits are classified according to eight social protection functions: sickness / healthcare benefits; disability benefits; old age benefits, including old age pensions; survivors' benefits, including a survivors' pensions; family / children benefits; unemployment benefits; housing benefits; social exclusion benefits not elsewhere classified. The at risk of poverty rate before social transfers is calculated using two definitions of income, depending on whether pensions are considered as social transfers or not. Pensions include: old age pensions, anticipated old age pensions, partial pensions, disability pensions, early retirement benefits due to reduced capacity to work, survivors pensions and early retirement benefits for labor market reasons.
5. The HDI is defined (United Nations Development Programme, 2014), as the geometric mean of the three dimensional indices:  $HDI = (I_{Health} \times I_{Education} \times I_{Income})^{1/3}$ . Each dimensional index is given by: Dimension index = (actual value – minimum value) / (maximum value – minimum value).

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# The Entrapment of Migrant Workers in Servile Labour: The Case of Live-in Domestic Workers from Ukraine in Greece

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## Ο Εγκλωβισμός των Μεταναστών σε Υπηρετικά Επαγγέλματα: Η Περίπτωση των Ουκρανών Εσωτερικών Οικιακών Εργατριών στην Ελλάδα

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### ABSTRACT

The article presents an effort to analyze the entrapment of migrant domestic workers in their low-status jobs. This will be done by looking at the consequences of live-in domestic work on migrant women from Ukraine working as servants in Athens. The study utilizes a Marxo-Weberian framework that focuses on both working conditions and perceptions of migrant workers. It is argued that the emotional demands of domestic work result in migrants perceiving their tasks as an extension of familial relationships and obligations. These employment relationships are defined as 'pseudo-familial' and form the basis of deference in domestic work. Combined with the structural barriers in the labour market, deference represents the subjective element of the entrapment of migrants in their job.

**KEY WORDS:** Servitude, deference, live-in domestic work, migration, familial relationships

### ΠΕΡΙΛΗΨΗ

Το άρθρο αποτελεί μια απόπειρα ανάλυσης του εγκλωβισμού των μεταναστών στα χαμηλού κύρους επαγγέλματα. Αυτό γίνεται μέσα από την εξέταση των συνεπειών της εσωτερικής οικιακής εργασίας των Ουκρανών μεταναστριών που εργάζονται ως υπηρέτριες στην Αθήνα. Η μελέτη χρησιμοποιεί μια Μαρξοβεμπεριανή προσέγγιση που εστιάζει τόσο στις συνθήκες όσο και στις αντιλήψεις γύρω από την εργασία. Υποστηρίζεται πως οι συγκινησιακές απαιτήσεις της οικιακής εργασίας οδηγούν τις μετανάστριες στο να ερμηνεύουν τα καθήκοντά τους ως προέκταση οικογενειακών σχέσεων και υποχρεώσεων. Αυτές οι σχέσεις αποσκόλησης ορίζονται ως 'ψευδο-οικογενειακές' και αποτελούν τη βάση της υποτακτικότητας στην οικιακή εργασία. Σε συνδυασμό με τα δομικά εμπόδια στην αγορά εργασίας, η υποτακτικότητα αποτελεί υποκειμενικό στοιχείο του εγκλωβισμού των μεταναστριών στο επάγγελμά τους.

**ΛΕΞΕΙΣ-ΚΛΕΙΔΙΑ:** Υπηρετικότητα, υποτακτικότητα, εσωτερική οικιακή εργασία, μετανάστευση, οικογενειακές σχέσεις

## Introduction

One of the most important problems faced by those who work in low-status jobs is the inability to move past those occupational positions and their corresponding social characteristics. It appears that work contributes to the crystallization of social disadvantage leading to the formation of a segment of the working class with no prospect of social mobility. Live-in migrant domestic workers represent an almost stereotypical example of this process of exclusion. This article will examine the reproduction of labour in this particular low status job, using a combination of Marxist and Weberian explanatory tools. The research tried to shed light to the reasons behind the prolonged stay of domestic workers in their job and the social deprivations that accompanies the entrapment<sup>1</sup> to their occupational position. It is suggested that domestic work, in spite of its exploitative working conditions, is perceived by workers in familial terms, thus naturalizing employers' domination, reproducing servile labour and resulting in the occupational ghettoization<sup>2</sup> of migrant domestic workers.

### 1. Servitude, deference and the reproduction of labour

The experience of servitude as a crucial aspect of work and employment has always played an essential part in the development of capitalism (Kolchin 1995, Engerman 1999, Bush 2000). As opposed to approaches that view servile labour as a remnant of pre-capitalist social relations (Coser 1973, Campani 2000, Thanopoulou 2007), capitalism seems to be carried on the shoulders of countless workers who spent their lives in the labour of obedience. Even more so in the context of internationalized late capitalism, where masses of workers are displaced from the periphery in order to seek employment in the core countries, mainly, but not exclusively, in the field of personal services (Sassen 1980, 1984, 1991, Cohen 2006). This represents nothing but the structural context in which nowadays one finds the servile migrant labour force, namely the workers in farming, in the catering industry, the sex industry and domestic work.

As important as this discussion may be, it provides but little insight to one of the greatest problems faced by sociology and social policy in recent times. That is the entrapment of these workers to their jobs and more importantly their apparent identification with the characteristics of their work and employment (Psimmenos 2013, Xypolytas 2013). Why is it that migrant workers in low-status jobs remain in their work for so long? Is it only structural barriers that prevent their escape from their employment condition or are there other factors at play which associate them with their work and bind them to servile employment relations? These questions will be addressed through the research on live-in migrant domestic workers from Ukraine who are employed in Greek households.

Once again it is important to note that in both the 19<sup>th</sup> and the 20<sup>th</sup> century servile labour coexisted along with traditional working class occupations and to a certain extent it was shaped by capitalist development itself (Psimmenos 2013). Especially in the case of women, historians and sociologists stressed the importance of domestic service as a survival strategy but also as a means of preparing the younger generation for their role in the working class family (Horn 1980, Beynon and Austrin 1994). Thus, for many women, domestic service represented a part of the life-cycle (Davidoff 1973, 1974), where the experience of servitude acted as the quintessential mechanism for disciplining them into their auxiliary role in the working class (Chantzaroula 2012).

However, the experience of servitude does not imply simply unfavorable conditions of work and obedience to the rules or whims of the employer. Its main quality was – and still is – its ability to transcend the “house gates” and play a significant role in molding characters of subordination (DuBois 1995, 1999). This is particularly important since servitude not only plays a vital role in the organization of domestic work, but also shapes the values of the workers even after the end of their employment. In his classical analysis, *The American Dilemma* (1976), Myrdal places particular emphasis to the crystallization of inequalities, not only through semi-permanent structural barriers, but more importantly through the shaping of mobility values to the workers themselves. In other words, the experience of servitude results in the personal identification of workers with their social role that binds them to their place in the social hierarchy and legitimizes the social inequality inherent in it (Myrdal 1976, DuBois 1999, Dollard 1957, Rodman 1963).

This entrapment, whose main characteristics are acceptance and legitimation, is best described in the classic studies of *deference* (Nordlinger 1967, Mann 1973, Newby 1977) that sought out to explain how is it that many groups of workers – more often than not – disregarded exploitation and identified their interests with those of their employers, thus undermining their own economic and social position as well as their prospects of social mobility. The result was that despite the working conditions and material deprivations, there existed an overarching principle that workers adhered to and acted as the main source of legitimation. In the case of farm workers in England, for example, this principle was the one of *ownership*. In other words, for the workers the arbitrary nature of employer decisions was naturalized and legitimized on the grounds of them being the owners of the land; and therefore given an almost divine right to be as arbitrary as they wished. So, deference was defined as “... *the subscription to a moral order which endorses the individual's own political, material and social subordination, with the addition that this subordination should be legitimated on traditional grounds*” (Parkin 1971: 84).

It is on these premises that the reproduction of labour for migrant live-in domestic workers is to be addressed. Domestic service requires the execution of tasks that are based on the notion of care. Whether these are household tasks, taking care of children or the elderly, the perceptions of work are largely decommodified and are based on a familial understanding behind the employment relationship. Thus, in this case, the overarching principle of legitimation lies within the notion of the *family*. The *pseudo-familial relationships* (Xypolytas 2013) that characterize domestic work conceal exploitation, naturalize servitude and bind workers to their occupational position. This focus on both conditions and perceptions of work represents the basis of the Marxo-Weberian tradition as well as the theoretical foundation of the present research.

## 2. Migrant domestic workers: The research context in Greece

**T**he focus on migrant domestic workers in Greece has by now a long tradition that works as a foundation for both this research as well as future efforts to approach the topic. During the 90s the focus was mainly on conditions of work and housing. A number of studies (Kassimati 1992, Psimmenos 1995, Anderson and Phizacklea 1997) looked at the tasks, the salaries, the relationships with the employers, housing and living conditions and, apart from their slight methodological and theoretical differences, they seemed to reach at similar conclusions. Domestic service represents a type of labour that, apart from the problematic working conditions, seriously undermines the social mobility of workers. As later research suggested, this particular job appears

to be one of the few employment options for migrant women with the exception of the sex industry in a segmented labour market (Sakelis and Spyropoulou 2007, Maroukis 2010). However the experience of work not only is plagued with exploitative conditions but it also binds workers allowing for little or no room for seeking other forms of employment outside domestic work.

As the academic interest on specific occupational groups raised so did the publications on the importance of servitude as a means of approaching scientifically domestic work. The research on *welfare marginalization* (Psimmenos 2007, 2009, Psimmenos and Skamnakis 2008, Skamnakis 2009) looked at the way servitude formed values on domestic workers concerning social protection. These values centered on the primary importance of the employer family as a source of social protection, which combined with formal access barriers generated attitudes of superfluousness towards formal welfare. This finding is particularly important as it shows how the reach of servitude extends well beyond the gates of the employer's house and it informs the values of workers concerning their social rights. Moreover, it suggests that the subjective aspects of domestic work create a vicious circle whereby all aspects of social life are mediated through the relationship with the employer, thus binding workers to their job (Xypolytas and Lazarescu 2013).

This aspect of "blocked social mobility" (Solomon and Gould 1974) was also addressed through the case study of Romanian domestic workers. Lazarescu (2015) suggested that even though a worker's continued employment in domestic service appears as a fundamental aspect of entrapment, there are subjective understandings that generate a sense of advancement or mobility. So, the change in employment status (live-in / live-out) or the moving up in an informal hierarchy of household tasks create a dynamic aspect to a job that appears static from an observer's point of view. This is not to suggest that there are indeed aspects of social mobility to the experience of domestic work, but instead that the subjective understandings of work are essential if one is to understand the process of "occupational ghettoization" and how this is perceived by workers themselves.

Other studies on servitude of domestic workers placed particular emphasis on the notion of the family as a mechanism of subordination and entrapment. Chantzaroula (2012) looked at internal migrants in pre-war Greece and suggested that working-class girls from a very young age were disciplined in household labour in order to find work as servants when they were teenagers. Similarly, the servitude experienced in employer households would act as a "training mechanism" for their marriage that was to follow the completion of their domestic service. The approach of the present research is certainly influenced by this historical study, to the extent that it stresses the importance of the institution of the family – and the obligations towards other family members – as an overarching principle upon which subordination is "crafted" and legitimated (Chantzaroula 2007).

### 3. Ukrainian live-in domestic workers in Greece: Methodology

As the two previous sections suggest, in order to tackle the reproduction of servile migrant labour the emphasis must be placed on both the experience of work as well as the perceptions that are generated to workers themselves as a result of their labour. The international literature on migrant domestic workers, as one would expect, places strong emphasis on the exploitative characteristics of the job (Glenn 1981, 1986, Anderson and Phizacklea 1997, Anderson 2000, Hondagneu-Sotelo 2002, Romero 2002, ILO 2003, 2011a, 2011b). However, once again, one

of the most important problems by sociology and social policy is the construction of servitude in the context of the employment relationship and the prolonged stay of workers in their job. This process of 'entrapment' was put forward by workers themselves during various interviews and informal discussions, where one of the most frequent comments would be along the lines of "...I came here originally for a couple of months to save some money, and I ended up staying all these years". So, given the exploitative nature of the job, which the vast majority of interviewees was more than willing to report, what are the reasons behind the workers' lengthy stay? Is it just financial obligations to family back home or is there something in the experience of labour itself that could explain its reproduction?

The research took place between October 2008 and December of 2009 and it was based on 45 semi-structured interviews. In order to pursue answers concerning the reproduction of labour, the research focused on Ukrainian domestic workers. The reasons behind this choice were the following. *Firstly*, this specific nationality is overrepresented in live-in domestic work in Greece and *secondly*, there have been many relatively recent studies of Ukrainian workers (Kampouri 2007, Kassimati and Moussourou 2007, Sakellis and Spyropoulou 2007, Psimmenos and Skamnakis 2008, Nikolova and Maroufov 2010) that could provide ample room for comparison with the results of this research. The main criterion for participating in the research was that the interviewee had to live in Greece and work in this particular job for a period of no less than 10 years. By choosing this rather lengthy period as a prerequisite, the research tried to ensure that the participants have worked long enough as live-in domestic workers and through their interviews they can shed light on the reasons behind their prolonged stay. Similarly, in a period of 10 years, it is understandable that the women interviewed would have worked for a few employers, thus giving room for generalizations concerning their work and not just arriving to conclusions from the experience of a single household. Lastly, given that the interviews were conducted in Greek with Ukrainian interviewees, the 10 year period ensured, to a certain extent, a working knowledge of the Greek language.

As it was previously mentioned, the research was qualitative and semi-structured interviews were used a data-gathering method. The use of this specific methodology is directly related to the research question. The issue that is central to the analysis and determined the methodological tools that were used, is the way work is perceived and how this can lead to a prolonged stay in the specific type of job. As the literature in industrial sociology suggests, it is mainly in the perceptions of work that one can theoretically build on the issues of control, consent and reproduction (Beynon and Blackburn 1972, Burawoy 1979, Salaman 1979, Littler 1985). However, attitudinal data based on questionnaires with closed questions cannot provide the necessary depth for an analysis that centers on three important aspects of work; *the conditions of work*, *the relationships in the working environment* and most importantly, *the perceptions of workers concerning the executed tasks*. Hence, the interview guide was constructed in order to shed light on these three aspects, by giving room to the interviewees to provide details of their work, their appreciation of it, as well as the nature of the relationships that developed between them and their employers.

## 4.Reproduction of servile labour: Ukrainian live-in domestic workers in Athens

### *The tasks of live-in domestic workers*

**B**ased on the research, domestic work appears to involve three basic categories of tasks; a) *Household tasks*, b) *Care of young children or infants* and c) *Care of the elderly*<sup>3</sup>. Household tasks involve cleaning, cooking, gardening, going shopping, taking care of pets and generally servicing the household needs of the employers. The tasks associated with the care of young children depend on the age of the child or infant. In the case of newborns, domestic workers are supposed to clean, feed (with bottled breast milk) and spend time with the babies, while their parents are either working or resting in the house. For young children the tasks involve escorting them to the school or to the school bus stop, preparing their food, taking them to the park, playing with them at the house and putting them to bed. The third category, which involves taking care of the elderly, is the one Ukrainian domestic workers are mostly associated with in Greece. In this particular case the tasks depend on the condition of the old person. In other words, whether she or he can stand, walk or communicate are crucial aspects of the experience of work. Incapacitated old people require feeding, cleaning and often they are unable to communicate, whereas working with people who are able to take care of themselves involves executing the same tasks but in a less isolated environment (Xypolytas 2013).

The conditions of work are so demanding physically and mentally that domestic workers often reported various health problems to the skin and joints as well as mental disorders. Long, hours, low remuneration, lack of sleep, in certain cases insufficient food intake, sexual harassment were some of the problems that were brought out with the research, which of course serves mainly as a verification of disturbing findings that have surfaced with much previous research (Anderson 2000, ILO 2011a, 2011b). The most important issue, for the purposes of this article, however, is the way the actual work is perceived by workers themselves and how these perceptions contribute to the reproduction of labour.

## 5.Perceptions of work

**W**hen a sociologist is confronted with the issue of perceptions of work, one of the most important things to be considered is the tasks themselves. Since there is to a certain extent a consensus that work generates not only income but also meaning, then surely this cultural approach has to take into consideration the undertaking and completion of specific tasks that can gradually lead to the formation of specific values and beliefs. As it was described in the previous section, there are three categories of tasks in live-in domestic work; household tasks, care of young children or infants and care of the elderly. However, the successful completion of the tasks in these categories requires the exercise of *emotional labour* (Hochschild 2003), which Watson quite clearly defines as “*an element of work activity in which the worker is required to display certain emotions in order to complete work tasks in the way required by the employer*” (2003: 203).

What is rather interesting in the case of live-in domestic work is that the exercise of emotional labour leads to the internalization of the characteristics of work by the worker herself. There are two reasons for this. The *first* one is that in the context of this particular job, the worker

is required to constantly remain within the confines of the household where she is employed. As opposed to other workers, like Hochschild's famous example of flight attendants (2003), live-in domestics do not have the 'luxury' of separation between work and personal life. In the 1960's and 1970's the most important debates in industrial sociology focused on whether important conclusions about work can be drawn from life *inside* and *outside the factory gates* (Goldthorpe and Lockwood 1968, Benyon and Blackburn 1972, Edwards 1979). This important sociological distinction however, becomes not entirely relevant in the analysis of servitude in domestic work. The live-in domestic, differs from other workers, in that she is constantly at work, accessible and therefore far more vulnerable to the internalization of her job characteristics, since they are the central – if not the only – axis around which her social life revolves.

The *second* reason for the internalization of the characteristics of work and the development of subordination is the familial nature of the tasks themselves. The research showed that each category of tasks is perceived as a particular extension of familial obligations. These could be framed as *pseudo-familial relationships* and they operate in the following manner:

1. *Household tasks are perceived as an extension of "housewife" duties.*
2. *The care of children is perceived as an extension of motherly duties.*
3. *The care of the elderly is perceived as a duty of the young towards the old and as an extension of duties of the children towards their parents.*

### **- Perceptions of household tasks**

During the interviews the domestic workers that were employed in households as live-in maids, described the tasks that they had to complete during the working day. After the initial period of employment, where all the workers followed the instructions of the employer, the tasks and the way these were performed were presented as the subject of more autonomous decisions. Of course, this is a kind of autonomy that was granted by the employers given the trust that gradually developed between them and the domestic worker. This autonomy leads to perceptions of work that look at everyday routines as part of personal decision making and not as obligations of work. Thus, they conceal the employment relationship – and its obviously uneven distribution of power – instilling in the domestic worker the sense that she is in charge of the household. This appears as a role similar to the one of the "housewife" that workers filled in the country of origin while they were with their own family<sup>4</sup>. Galina describes this in the following way:

*"No! Now, I make the schedule myself. Let's say Monday, I do a thorough cleaning of the kitchen. On Tuesday, the master bedroom. On Wednesday, one child's bedroom. On Thursday, the other one. A thorough cleaning you know... Dust very well, take out all the books. Friday, I do the living room. I go through all the rooms each day. I leave nothing. I go through them fast. But one room has to be very well clean, because I like it this way. Not just doing only one room and leaving the rest. No, that's not nice"*

Apart from the "granted autonomy" that is frequently found in live-in maids, household tasks can be perceived as a non-work related aspect of everyday life in the case of domestic workers who take care of old people without anyone else present in the house. In this case, the employers, who are usually the children of the old person, rarely visit and the worker is also responsible for the reproduction of the entire household. These workers indeed enjoy an even greater amount of autonomy and their perception of work is almost entirely based on a sense of personal choice and involvement. Galina said the following concerning the household she was working at



*“I love this house and I take good care of it until now and I would feel very sorry if I had to go someplace else. Because six years I’ve been here and I am doing what I must. I mean there is a daughter that comes here once per week. She gives some money for food, for medicine, but I am the one in charge about all these things. I go to the pharmacy and I give the doctor’s prescription. This feels like my one home”*

### **- Perceptions of care of young children**

It becomes rather obvious that in the case of young children, the emotional attachment that domestic workers feel can be a very significant aspect of the experience of work. The perceptions of the tasks are often in no way connected with work obligations or economic incentives. As it was previously stated, the reason for this also lies in the fact that domestic workers are in many cases employed as babysitters in order to care for infants and can stay with the same employer for many years. One should also keep in mind that the prolonged stay in a specific household can be linked to these attachments as Tonia suggests.

*“The children are my life! But of course I raised them ever since they were babies. Now they are 7 and 5 (years old). Where would I go? When they return from school and I sit at the living room and we paint together. This is the best! They come back from school and they tell me what the teacher said, or what a friend said. We talk, we laugh...”*

The attachment involved in taking care of young children is indeed rather obvious. However, an important aspect of the perceptions of care is the fact that many Ukrainian domestic workers already had children of their own before they migrated to Greece. These children were left behind with their fathers or members of the extended family. The literature (Anderson and Phizacklea 1997, Anderson 2000, Kofman et al 2000), as well as the present research, suggests that taking care of a child – often close at the age of their own daughter or son back home – fills the void of this separation. Nonetheless, this leads to an understanding of work that looks at everyday realities of care as an extension of motherly duties. Galina explains this rather clearly:

*“This is very hard! (Coming in Greece for the first time) You don’t speak the language, you don’t know anything. You’re locked (in the employer’s house), you’re a young woman and you give your love to a stranger’s child. And you have your own child back home that is 2 years old and that is so (hard) You see a stranger’s children as your own. This is very, very hard”*

### **-Perceptions of care of the elderly**

The perceptions of work in this third category of tasks are rather important since it is the one where Ukrainian domestic workers are overrepresented. As with the case of care of young children, in this category, the tasks workers perform – as strenuous and exhausting as they may be – they demand a close and often physical contact. As Wolkowitz suggests in her analysis of body work (2006), this kind of tasks presupposes but also develops a strong sense of trust and familiarity. The research showed that these details of everyday care of old people lead to the formation of affectionate relationships. The pseudo-familial nature of these relationships is

further highlighted by the use of the word *giagia* (grandmother) or *papous* (grandfather) that workers often use to describe the people they work for. Liuba describes this in the following way.

*"The grandmother had to get up. So I get her out of bed, I take the oxygen tank and we go to the bathroom. We switch off the oxygen for about 10 minutes... I don't mind bathing her at all. I put her in the bathtub for 10 minutes and I wash her so she can always be clean. And she also has a problem with her breathing. I help her with that and I give her a massage; many times. Because she is running out of breath and it helps her a lot. Grandmother really likes that"*

The pseudo-familial relationships generated through the tasks can often become very strong. The language used in the previous extract is a fairly good indication, but one could argue that calling an old person 'grandmother' or 'grandfather' is commonly used in the Greek language. However, the tasks and the relationships with the employers are perceived not as a labour obligation but rather as an extension of workers' ability to express fondness and attachment. Zenia describes her gratification of the personal relationship she developed with her employer, whom she often called 'mother', not due to the workings of the Greek language but as a pure expression of affection.

*"This grandmother in Kalithea (area in Athens) I used to work, she didn't have children of her own and I was the first to call her 'mom'. When I used to call her 'mom Christina' she used to melt (expression that means she was deeply moved). This gave me great joy. The other thing that really impressed me was that she might have been in pain during the night, but she wouldn't call me so I wouldn't wake up and help her. But my mind was there and I was feeling her. I was feeling that she was in pain and I used to get up and ask her. 'Mom, what's wrong? Are you in pain?' And she would say, 'Yes, but I didn't want to wake you'"*

Looking at the perception of work in all three categories of tasks, what becomes clear is that extremely problematic conditions of work represent only one side of the coin that is labour. A side that is indeed troublesome, especially if one keeps in mind that the experiences of many domestic workers do not constitute a reality anymore for millions of workers since the beginning of the 20<sup>th</sup> century (Addams 1896, Ray and Qayum 2009). However, it is in this other side of the coin that the notions of servitude and deference are generated and the entrapment of domestic workers is to be understood.

## 6. Concluding remarks

**T**he research set out to explain the reasons behind the prolonged stay of migrant domestic workers in their job. In order to tackle this issue it is important to understand the values that generated in working conditions of servitude. It may appear that there are indeed strong occupational mobility barriers that are set in labour markets that are structured around ethnic, racial and gender lines. However, from a sociological point of view, these barriers are not but one aspect of the problem. Arguably, a far more significant issue is the values that are instilled in workers themselves. These values reinforce occupational segregation by identifying workers with

their place within a specific labour market. In the case of migrant domestic workers these values revolve around the notions of servitude and the deference that is associated with it.

The pseudo-familial relationships that were described form the basis of employment but more importantly are the quintessential aspect of deferential labour. Caring for one's family appears as an undoubted duty or as a "labour of love" (Oakley 1974). The attachment of the workers to the employers, in the context of live-in domestic work, takes a pseudo-familial form legitimizing labour on the grounds of it being an objectively valid, humane and often selfless act. This way deference is based on the overarching principle of familial obligations. The duties of a mother, a daughter, or even a household carer seem to transcend the notions of labour demands or obligations. Such understandings of work come to naturalize the experience of servitude and, as Parkin (1971) would suggest, indeed subscribe to a moral order which endorses the individual's own political, material, social – and personal one may add – subordination. This intricate combination of objective conditions of work and subjective understandings of it represents the basis of deference of the live-in domestic worker.

However, what deference represents is not merely the acceptance of work and employment conditions. It is the basis upon which the mobility values of migrant domestic workers are built. The structural barriers that prevent exit from low-status jobs remain forever strong. What deference does is to decisively reinforce these with even stronger materials, which are none other than the values workers have concerning their place in economy and society. The experience of servile labour and the construction of deference naturalize subordination under the guise of family. But more importantly they lead to the formation of a segment of the working class that identifies on a personal level with the characteristics of their labour transforming the latter into an almost inescapable trap of social and economic deprivations.

## Notes

1. The entrapment of domestic workers refers to a combination of two processes that were unintentional by the workers themselves. It is the process of the prolonged stay in the occupation based on inability of access to different labour markets as well as the process of identification with the characteristics and demands of domestic work (Greggson and Lowe 1994, Chin 1998, Vidal-Coso and Vono de Vilhena 2015).
1. The term is taken from Glenn's study of Japanese domestic workers in the United States whose entrapment in their job lead to existence of three consecutive generations of Japanese servants (Glenn 1981, 1986).
3. It should be stressed is that these categories represent simply the "formal" reason that employers gave the worker for hiring her. Similarly, it must be noted that household tasks and care are not mutually exclusive categories, since taking care of an old person or a young child involves a variety of tasks such as cleaning after them, cooking their meal etc.
4. This aspect of the perceptions of work is crucially important as it shows that through domestic work, migrant women are familiarized with patriarchal understandings of gender, which often were less constricting and traditional in the country of origin (Abadan-Unat 1977, Anderson 2000, Kofman et al 2000).

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# Education in Conditions of Crisis in Greece: An Empirical Exploration (2000-2013)

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## Η εκπαίδευση σε συνθήκες κρίσης στην Ελλάδα: Μια εμπειρική διερεύνηση (2000-2013)

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### ABSTRACT

The article aims at exploring the ramification of the crisis on education in terms of access to education, educational attainment of the population, funding, schools, teachers and students. These and other aspects of education are examined on basis of statistical data that has been collected and published by international agencies and Greek sources. In order to analyse fluctuations and trends, the data examined covers a period before and after the onset of the crisis (in 2009), namely from 2000 to 2013. In addition, socio-political developments and educational policy are taken into consideration, for they form the context in which education operates. The concept guiding this endeavour is equity; it is defined normatively as equality of opportunity and meritocracy, the two principles upon which social institutions function in a democratic society. The results point to differences in the ways education has been affected by the crisis: at micro and meso level, for example, the funding, the school units and the education personnel have been reduced; at macro level, access to education and education attainment continues to rise, but to a lesser degree than before the onset of the crisis.

**KEY WORDS:** Greece, crisis, education, statistical data, funding, school units, education personnel, pupils, access to education, education attainment.

### ΠΕΡΙΛΗΨΗ

Το άρθρο αυτό αποσκοπεί στη διερεύνηση των επιπτώσεων της κρίσης στην εκπαίδευση, εξετάζοντας την πρόσβαση, την αποφοίτηση, τη χρηματοδότηση, τα σχολεία, τους εκπαιδευτικούς και τους σπουδαστές. Αυτές και άλλες πλευρές της εκπαίδευσης εξετάζονται στη βάση στατιστικών δεδομένων, τα οποία συλλέγονται και εκδίδονται από διεθνείς οργανισμούς και Ελληνικές πηγές. Προκειμένου να διερευνηθούν διακυμάνσεις και τάσεις, τα δεδομένα που εξετάζονται καλύπτουν τη χρονική περίοδο πριν και μετά την εκδήλωση της κρίσης από το 2000-2013. Επιπρόσθετα εξετάζονται σε γενικές γραμμές, οι κοινωνικοπολιτικές εξελίξεις και η εκπαιδευτική πολιτική, καθώς αποτελούν το πλαίσιο στο οποίο η εκπαίδευση επιτελεί το έργο της. Έχοντας ως αφητηρία την έννοια της ισότητας, οριζόμενης κανονιστικά, ως ισότητα των ευκαιριών και αξιοκρατία, τα αποτελέσματα της έρευνας δείχνουν τους διαφορετικούς τρόπους με τους οποίους η εκπαίδευση έχει επηρεαστεί από την κρίση: σε μικρό και μεσαίο επίπεδο ανάλυσης, η χρηματοδότηση, τα σχολικά κτίρια και οι εκπαιδευτικοί έχουν υποστεί μείωση. Σε ένα μακροεπίπεδο ανάλυσης, η εκπαίδευση με όρους πρόσβασης και απόκτησης τίτλων σπουδών συνεχίζει να αυξάνεται, αλλά σε βραδύτερο ρυθμό απ' ό,τι πριν την εκδήλωση της κρίσης.

**ΛΕΞΕΙΣ-ΚΛΕΙΔΙΑ:** Ελλάδα, κρίση, εκπαίδευση, στατιστικά, πρόσβαση, αποφοίτηση, χρηματοδότηση, σχολεία, εκπαιδευτικοί, σπουδαστές.



## Introduction\*

This article aims at exploring the ramifications of the crisis on education in terms of access education, education attainment, funding, schools, teachers, and students. These and other aspects of education are examined on basis of statistical data that has been collected and published by international agencies and Greek sources. In order to analyse fluctuations and trends, the data examined covers a period before and after the onset of the crisis (in 2009), namely from 2000 to 2013<sup>1</sup>. In addition, socio-political developments and educational policy are taken into consideration, for they form the context in which education operates.

The international financial crisis followed the bankruptcy of the private bank Lehman Brothers, in the United States of America, in 2008 and started having an effect in Greece a year later in 2009. Since then, Greece has entered a phase of continuous economic recession, characterised by massive unemployment (27,5% in 2013 according to Eurostat) and rising poverty for millions of people (more than 23% in 2013). Rising existential insecurity, the continuous economic instability, and not only a feeling but a condition of powerlessness for millions of people, characterise social life having various consequences that have to be studied.

The institution of education, as other institutions, has been affected by the crisis, both in direct and indirect ways. The government's main strategy to deal with the crisis was adopting 'austerity' measures<sup>2</sup>, meaning severe 'cuts' in public spending. This together with the rising level of unemployment, the enormous 'cuts' in salaries and pensions and the increased taxation have had stark effects on people's conditions of life. This, in turn, has affected many children, as it has been reported that they suffer from lack of sufficient nutrition, clothing, and may miss school books and materials, to name only a few of the effects. It is worth noting here that civil society has reacted immediately, especially after 2011, by setting up extensive solidarity networks in order to provide help and relief both to children and their families (see Kantzara, 2014, 2015; Tziantzi, 2015).

Except from a few reports based on data, research and study on the ramifications of the crisis on education are, to my knowledge at the moment of writing, rudimentary. There is, in general, a hesitation to deal with a phenomenon that takes place at macro, meso and micro-level of society at the same time. Concepts and theoretical frameworks even in the existing publications seem to centre on the notion of 'lack', 'austerity', impoverishment and their effects on people's life.

The starting theoretical point of this research is that the relation of education to society, the subject matter of sociology of education, is multifaceted and complex. This text forms an attempt to exploring the ways as well as the degree to which education has been affected by the crisis in terms of indicators for which there is statistical information. The data is selected on the basis of having a direct relation with aspects of education, including data that bear on the socio-political context.

In this endeavour, the concept employed, mostly in a latent sense, is equity. Equity is a complex concept; it is usually employed in terms of *equality of opportunity and meritocracy* (see also Callinicos, 2000); these connotations, especially the term equality of opportunity is further defined as access to and success in education. Access to education can be measured, for example, by the number of student enrolment and drop-out. Success in education is concluded by the number of students, who completed their studies and have acquired an educational title; this process is denoted by the term educational attainment. The idea behind 'access to and success in

education' that is promoted by international organisations, including the European Union (and handled thus in the collection of data by Eurostat) is that the higher the educational attainment, especially in tertiary education, the higher level of equity in a country for the various categories of the people comprising the population. The data collected and published contains in the same table two distinct population categories, age and gender; in our presentation we shall take them into consideration.

The question that often arises in such endeavours is whether an education system retains its equity characteristics, when it operates in conditions of crisis. The question is difficult to answer without taking into account the human factor, that is, the combined efforts of people in education (teachers, students, parents), civil society organisations, the government and others and examine effects separately and combined. I return to this point below in the concluding section of the article.

The text that follows is structured as follow: the next section refers to the socioeconomic and political context, followed by population indicators related to education attainment; the discussion of main measures of the educational policy comes next followed by the examination of educational indicators related to the education system and its people; the article closes with notes and conclusions.

## 1. Greece: Socioeconomic and Political Context

**T**he onset of the crisis had an impact on political life. At least three different governments, mostly conservative, were formed between 2009 and 2012; the fourth government that was formed after the election in January 2015 was for the first time in the Greek history, a coalition of left to centrum political parties.

From 2009 and onwards, the Greek governments dealt with the crisis and its effects by adopting 'austerity' measures and by attempting to reform both public and private institutions, from labour to pensions, and from education to local government. Both financial measures and institutional reforms were to a large degree imposed by the 'money lenders', that is, the international organisations involved in the 'bail out' of Greece, the so-called 'troika', consisting of representatives from the International Monetary Funds (IMF), the European Central Bank (ECB) and the European Commission (EC).

Greece received billions of euros from the troika as 'bail out' after signing two agreements (Memorandum of Understanding). The bailing out of Greece, however, constitutes strictly speaking a loan to be paid back with interest. The bailing out means that Greece buys expensive time in order to 'restore' healthy institutions and market relations. It should also be added that most of the loan-money coming into the country is going immediately out, as it is been used to paying back previous loans. In this way, the debt is being actually renewed, increased and its burden transferred to future generations.

Austerity measures, lack of trust and other factors have affected economic activity. The General Domestic Product (GDP) has decreased, described characteristically as 'shranked', from 237,431 in 2009 to 182,438 billion euros in 2013. During the same period the public debt (i.e. the "Central Government budgetary debt") increased from 301,002 (in 2009) to 319,133 (in 2013) billion euros and the prognosis is that the coming years it shall continue increasing (see Public Debt Management Agency, 2015).

In addition, during 2009-13, the unemployment rate rose acute from 9,6% (*in 2009*) to 27,5% (*in 2013*), while in the other 27 European Union (EU) countries, the same rate rose by 2,5% (from 9,5% in 2009 to 12,0% in 2013).

Furthermore, the poverty rate has risen for adults and children alike. The poverty rate for adults rose *by more than 3%* (from 20% in 2000 to 23,1% in 2012); women being relatively poorer than men (23,6% and 22,5% respectively). In the other EU 27 countries, the poverty rate in 2012 was 17,1%. Moreover, the child poverty rate *has risen by 7,5%* (from 19% in 2000 to 26,5% in 2012) for children under 16 years old; while the 27 European Union countries saw an increase too, though not so acute, by less than 2% (from 19,6% in 2005 to 21% in 2011).

In addition, according to the UNICEF reports published in Greek: in one year only the poverty rate increased by 3,3% (from 23,6% in 2011 to 26,9% in 2012) for children under 18 years old (UNICEF 2014: 26). Children's "risk of poverty and/or social exclusion" rate has also increased by 9% (from 26,5% in 2005 to 35,4% in 2012) (UNICEF 2014: 32).

From the above data, we could conclude that poverty rates has risen considerably and affected adult women and children more than adult men. In my opinion poverty rate both for adults and children under 18 years old is considerable high not only in Greece, but also in the other European Union countries.

## 2. Educational Attainment (Qualifications) and Funding of Education

**I**n general lines, the educational qualifications of the population, aged 25-64, are increased from 2000 to 2013. Eurostat employs the classification of the education system, known as *International Standard Classification of Education (ISCED)*.

In 2013, the population, aged 25-64, according to the Eurostat data had acquired the following educational qualifications:

- 33,1% of the population was qualified at *compulsory* education level (ISCED 0-2);
- 39% in upper secondary education and *vocational-technical* education (ISCED 3-4);
- 27% had reached tertiary *education (including masters and doctoral thesis)* (ISCED 5-6).

In short, the majority of the population (aged 25-64) has graduated from upper secondary education level.

More particularly, attaining educational qualifications has increased in the last decade in the general population; *women particularly caught up with men at all levels*: for example, in ISCED level 0-2 (compulsory level education), women's attainment declined from 50,3% in 2000 to 31,5% (in 2013), while men's respective attainment declined from 46,4% to 34% during the same period. Most impressive is the increase of holding a tertiary education qualification: *women's attainment increased from 15,5% in 2000 to 27,1% in 2013*.

The average of education attainment in tertiary education in Greece is considered positive and in the direction of the target posed by OECD and European Union. According to the latter, by 2020 the target is that 'at least' 40% of the population, aged 30-34, should have acquired a tertiary education qualification (Eurostat, 2015).

However, while the trend could be judged on the whole as positive, a closer look reveals that the pace varies in different years. *During the years 2003-04 and 2010-11 at educational level 5-6*

*(higher education), there is an increase of 2%; in more recent years, especially between 2012 and 2013, the increase in education attainment is less than 1%.*

In 2004 the Olympic Games took place in Greece and one would expect a general optimism, while in 2010 and 2011 after the onset of the crisis and the first serious signs of enduring economic recession, a number of young people who became unemployed very possibly returned to education to complete their studies, in order to increase their chances to find employment or graduate before they migrate abroad. To my knowledge there is no particular study addressing the above mentioned developments; my interpretation here is based on discussions with (older) students, and comments and reports made by colleagues from other Universities in Greece and abroad. Ethnographic research indicates that during the crisis, students tend to be more focused on their studies and want to complete it on time (Thanos, 2014).

In 2012, at educational level 5-6 (tertiary education), *women aged 25-34 outnumbered men by almost 10%* (39,8% and 39,0% respectively) and this analogy is almost reversed in the age category of 55-64, in *which men outnumber women by 8,3%*. It is worth adding that people of this age category were students during the late seventies and eighties, when the total of students was under the 100.000, while today it is more than 330.000 denoting a massive development in tertiary education (information on previous periods, see Psacharopoulos, 2004).

Noteworthy: in 2012, the majority (44,9%) of those aged 25-34 have attained a secondary education level (level 3-4), 34,2% of them has studied at tertiary education (level 5-6) and 20,9% of them completed the compulsory education (level 0-2). The increase of those attaining a tertiary degree qualification between 2000 and 2012 is 11,4%, which increase is the highest of all educational levels.

Table A.1.

	Greece													
	From 25-64 years													
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
<b>Educational levels 0-2</b>														
Total	48,4	47,9	46,1	44,3	41	40	41	40,2	38,9	38,8	37,5	35,5	34,3	33,1
Males	46,4	46,3	44,6	42,9	39,7	39	41,7	41,1	40,1	40,2	39,2	37,3	36	34,7
Females	50,3	49,5	47,6	45,7	42,2	41,1	40,3	39,2	37,8	37,3	35,7	33,8	32,5	31,5
<b>Educational levels 3-4</b>														
Total	34,6	34,8	35,9	37,2	38,5	39,4	37,5	37,8	38,4	38,4	38,6	39,1	39,7	39,9
Males	34,6	34,8	35,9	37,2	38,5	39,4	37,5	37,8	38,4	38,4	38,6	39,1	39,7	39,9
Females	35	35,1	36,4	37,5	38,5	39,7	36	36	36,9	37	37	37,5	38,3	38,5
<b>Educational levels 5-6</b>														
Total	17	17,3	18	18,5	20,5	20,6	21,5	22	22,6	22,8	23,9	25,4	26,1	27
Males	18,6	18,6	19,1	19,6	21,7	21,3	22,2	22,8	23	22,7	23,7	25,2	25,7	26,8
Females	15,5	16,1	16,9	17,5	19,3	19,8	20,8	21,2	22,3	22,9	24,1	25,6	26,4	27,1

Source Eurostat, (ISCED 97)<sup>3</sup>

The social demand for more education has an impact on government policy that tried to respond by expanding and providing more opportunities to study, especially in tertiary education throughout Greece (see also the historical study of Tsoukalas, 1992). It is a trend similar to other countries in Europe. After the military dictatorship (1967-74) the demand for more education has led to an expansion of tertiary education at an unprecedented level, including studies at post-graduate level (see also Prokou, 2013).

## 2.1 Funding of Education

In relation to funding of education, as one would expect, it is decreased, though statistical data is hard to find. Data from the Eurostat stop in the year 2005, that is, four years before the onset of the crisis.

Accidentally I came across an analysis of funding and budgeting of education made by Syriza, when in major opposition; the funding went as follow: in 2009 public expenditure on education was 3,13% of GDP, while in 2013 dropped to 2,78% (estimated in billion euro: in 2009 it was more than 7 billion while in 2012 dropped to 5 billions). The General Domestic Product at the same period dropped: in 2009 it was approximately 231 billion and in 2013 approximately 183 billion euro (EEKE 2012: 5).

These finding are supported by Eurydice reports (2014) according to which the budget spent on education was in 2013 a little less than 6 billion euro. Also in another Eurydice publication (2013), it is argued that in 2011 and 2012, Greece was among the countries that cut their budget on education by more than 5% (Eurydice 2013: 11).

At the same time, the well-known PSI (Private Sector Involvement – in deals over sovereign debt restructuring – commonly named as ‘haircut’) was carried out in 2012 and left higher education (especially universities) without any deposits (an estimate of 44 million euro), because they were ordered by the Ministry of Education to transfer them to the Bank of Greece that carried out the PSI. The PSI was meant for the private sector, not the public one, and this raises serious questions of legal nature.

Every year, since 2011, budgetary cuts take place in Universities that today amount to 30% and in some cases 50% of the budget they had before 2009 (information from colleagues in other universities, media coverages and communication of the Dean to personnel at Panteion University, where I teach, in 2012, 2013, and 2014). At the internet site of Panteion University, for example, information on the budget is displayed as follow: in 2012, 4.100.000 million; in 2011 4.633.838 million; and in 2010, 6.685.329 million euro<sup>4</sup>.

## 2.2 Private Expenditure on Education

According to the Eurostat data, private expenditure on education has risen between 2000-2005 (from 0,24% to 0,26%). Unfortunately, data stops that year (2005).

Taking into consideration another indicator, namely ‘private expenditure of households on education’, the data shows that the percentage in Greece has risen by 0,5% (from 1,9% in 2000 to 2,4% in 2011); while the European Union 27 countries average remains around 1,0%. Though Greece has not issued any tuition fees at all levels of education, it seems that on average Greeks spend more money on education than other European countries citizens. The report published by KANEP/GSEE in 2011, shows that the percentage of EU 27 countries on education as part of consumption in 2008 was 1,05%; Greece was first on the list with 3,23%, followed by Cyprus (2,96%) and Letland (2,36%) (KANEP/GSEE 2012: 75).

*In short:* the population attaining educational qualification has increased and it seems unaffected by the crisis, as one would expect a decline. However, the pace of attainment has slowed down though it should be added that women caught up with men at every educational level. In relation to funding of education: statistical data that depict public funding on education in Greece is hard to find; some analysts talk about a dramatic decrease in public spending on education. At the same time the more the government cuts on educational budget it seems the more the relevant expenditure has to be counterbalanced by families; the latter seem to invest more on the schooling of their offsprings even in conditions of crisis.

### 3. Educational policy and measures before and after the onset of the crisis: an overview

**B**efore the onset of the crisis, education is characterised by expansion at all levels and in terms of departments, personnel and student enrolment. At the beginning of 2000 up to 2007, educational measures dealt with a number of long standing issues on basis of equality of opportunity and meritocracy, such as: *drop-out* (at compulsory education level), *'low' level quality of technical-vocational education* (at secondary education level); and the *'difficult' entrance exams to tertiary education*; aspects of the Bologna process (1999) are being introduced in tertiary education; and *teachers' recruitment* has altered as well.

On the whole, the Greek education system with *its free of tuition fee attendance has a strong equalitarian orientation*; in practice though those who are equipped with the necessary economic and cultural capital from home tend to have better educational results and unhindered school career. Moreover, research shows that inequalities related to social class, gender, migration, and other student categories still persist (see Kantzara, 2006b, Sianou-Kyrgiou, 2006, 2010a, 2010b).

After the onset of the crisis in 2009, *educational policy is characterised by strategies, such as extensive budgetary cuts, lay-offs of administration and educational personnel, and thirdly, extensive educational reforms.*

A main target of educational measures in the first place is the downsizing of education, of 'shrinking' it in a way. In primary and secondary education, schools have merged, and about 1500 school buildings have been shut down (for more information, see next section). The same procedure was followed for tertiary education as well. The idea behind it was to make the education system 'more efficient' by dividing it into larger units, which ideally are less costly to control and to manage. This is more apparent at tertiary education where the merging of departments and universities have created larger units, also because university departments have been forced to form faculties, which at the same time meant extra management and academic positions. The final target has been the control of education system and this is to be seen by the implementation of evaluation as an instrument of quality assurance which actually is interpreted as enforcing compliance at all levels of education.

Regarding tertiary/higher education: the law number 4009/2011 has been important as it attempts to implement many aspects of the Bologna process (1999) and Lisbon strategy (2001) in education in Greece. Main changes refer to management structure, the introduction of evaluation at all levels and the attempt to bring university studying closer to the labour market 'needs'. Terms such as 'innovation', 'excellence', and 'prosperity promised for all', if they help

that Europe becomes competitive in the world economy, has entered Greece as well. It seems that the academic university is losing gradually ground from the rhetoric on the 'market needs' and 'student's employability'.

A critique addressed to the aforementioned measures is that public education has been gradually 'dismantled', and at the same time it is being indirectly privatised: for example, a large number of post-graduate study programmes started charging tuition fees, while most were free of tuition fees before 2011. However the education law passed in 2011 deemed such practices legal and urged universities to 'find their own funds'.

The management and the administration of education have been subject to change, but the study programmes, so far have not been changed, at least not directly. This has been touched upon by a law in 2013 that refers to upper secondary education (called Lyceum – 3 years of study): this law tries to regulate entrance to tertiary education from the first class of Lyceum. Until 2013 university entrance exams are taken at the end of the third year of Lyceum. According to the new law, courses have been diminished and exams taken every year to pass the class also count (by 50%) for the university entrance. That meant issuing a data bank for the exam questions, which actually gave rise to students' reactions in 2014, for they massively did not do well in these exams.

It is, to my opinion, too early to evaluate the aforementioned measures; critique however shows that many more students will be now obliged to follow extra courses at the 'phrontistirio', a private preparatory school helping students with school and exams. Those who cannot afford it they shall be less well prepared for the University entrance (Panhellenic) exams.

In addition, a long term effect is the migration of young people abroad to study or to find employment, a phenomenon called 'brain drain'. Extensive budgetary cuts and lack of perspectives for a suitable career have driven prospective students, either out of the country or away from public education institution to private ones. Migration of out of Greece has been increased and affected students of all the other two levels of education. Additionally, massive unemployment meant that many highly educated individuals migrated to other countries seeking employment, and less precarious conditions of life. Estimations vary and some of them mention that between 2008 and 2013 more than 200.000 young well educated Greeks, migrated for employment reasons outside of Greece (Bank of Greece, 2016: 74; see also Smith, 2015).

In short: before the onset of the crisis, education is characterised by expansion, and by attempts to deal with long standing problems or issues, as for instance drop out, technical-vocational training, lifelong learning and intercultural education. After the onset of the crisis, education is being 'shrunked' as closing and merging of schools and departments is considered as the answer to aspired 'effectivity', while educational personnel is being evaluated under worsened working conditions and a heavy work load. The quick pace of the changes that are introduced orient the education system to align more to market demands, while changing nothing to the better to some of the standing problems, such as quality of technical vocational training, facilitating transition to the labour market and financing research, to name only a few.

To my view, educational reforms gear the system towards conservative orientations that include intensification of control and establishing new managerial structures: the introduction of evaluation at all educational levels denote a definite turn from an education oriented to academic education to an education oriented to acquiring skills in order to continuously feed and sustain a person's, so-called, employability. This is a trend prevalent in many European countries, and it seems that Greece finally is catching up, but to many authors this development constitutes a negative record.



## 4. The Greek Education System and Its People

**I**n this section, the indicators refer to students, adult participation in education, teachers' corps and schools (see notes 2 and 3).

### 4.1 Students

On the whole, the number of students has increased between 2000 and 2011, by 147.000 (from 2.031.340 in 2000 to 2.178.296 in 2011). It is interesting to note that the increase is not steady and gradual; while between 2010 and 2011 there is a decrease (see table below). Moreover, in two consecutive years 2005 and 2006, student population was higher than in 2011 by 15.000 and 6.000 respectively (2.194.230 in 2005 and 2.184.995 in 2006).

**Table B.1**

	Totals /All levels												
<b>Grecia</b>	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	
	2000												
<b>Total</b>	2.031.340	2.052.743	2.118.898	2.123.181	2.194.230	2.184.995	2.107.099	2.157.590		2.183.041	2.178.295		
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
<b>Males</b>	1.032.741	1.035.792	1.073.800	1.066.733	1.074.876	1.115.739	1.112.728	1.079.311	1.102.397		1.121.608	1.119.795	
<b>Females</b>	998.599	1.016.951	1.045.098	1.036.022	1.048.305	1.078.491	1.072.267	1.027.788	1.055.193		1.061.433	1.058.500	
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012

Source: Eurostat (ISCED 97).

From the student population, more than a million is men (peak year 2011, they were 1.121.608), while women students amounted to under a million in 2000 and reached just over a million in 2011 (peak year 2005, women students amounted to 1.078.441). The fluctuation is related to demographic reasons and could not be solely related to the crisis. To my opinion, the Olympic Games in 2004 played a role, as the population was 'warmed up' to follow a study, as it promised a better way out to employment.

Furthermore, the total numbers of youth studying has increased but looking at specific age categories then there is also a decline: between aged 6 and 14 there is a decline culminating between 0,2% to 1,5%. In the age of '14 and less' there is a decrease of students that is more than 5% (from 56,7% in 2000 to 51,1% in 2011); the age category 15-19 has a decline of more than 11% (from 30% in 2000 to 21,7% in 2011).

*Adult students have decreased as well by 1%* (from 13,3% in 2000 to 12,3% in 2011) while between 2006 and 2010 they had reached a percentage of about 25%. *Students' numbers under 20 years old are decreased* – steadily – during the same period by about 14% (from 86,7% in 2000 to 72,8% in 2011).

The age category of students that has *remarkably increased is, the age of '25 or older', who amounted 30.047 in 2000 and reached a total of 307.184 in 2010*; in addition the age category of '25 to 29 years old' among whom students were 30.198 (in 2000) and reached up to 289.222 (in 2010) made sure that the total of students seems to have increased. The most remarkable fluctuation is also to be seen in the age category of '30 to 34 years old', whose numbers increased from about 1.918 in 2000 to 17.962 in 2010, but in between they reached numbers that exceeded the 100.000 (in 2005, 2007, and 2008-in this year more than 146.000).

In relation to gender: *men students increased* by 0,6% (from 50,8% in 2000 to 51,4% in 2011, and *women students decreased* by 0,6% (from 49,2% in 2000 to 48,6% in 2011).

In relation to nationality: in 2011, foreign students were 5% of the total population and this percentage is higher than other OECD countries in the region and followed by Italy (4%) (OECD 2013).

In relation to *participation of children with disabilities*: the data from ELSTAT (Hellenic Statistical Authority) covers the period of 2001 to 2006, during which there is an increase of students, school units and teaching personnel. In 2001, at primary and secondary education, in public education: there were 4.441 students, and 201 schools; in private education there were 2.724 students and 51 schools.

In 2006, in public education (both at primary and secondary education), there were 5.840 students and 287 schools; and in private education there were 2.789 students and 53 school units<sup>5</sup>.

From the above data, one can see a clear increase of school unit reserved for students with disabilities. The Greek statistical service provides on its internet site no other statistical information; in other words, *data about the development of schools and students after the onset of the crisis is lacking*. From personal information I know that schools have closed down or merged.

The second issue here is that there is no information about whether the existing schools suffice to house and facilitate enrolment of all children with disabilities. In other words, it is very probable that not all children in Greece with disabilities attend school at the compulsory level of education.

### *Students from Ethnic Minority Background, and Immigrants*

At primary and secondary education the available data comes from ELSTAT and it is worth noting that information on repatriates, that is Greek nationals, is collected together and subsumed under the same category with 'foreigners'.

According to the data, there is an increase of foreign pupils/students in schools between 2007 and 2011. More particularly, in 2007, the foreign and repatriate pupils were 70.594 (5.239 repatriates, and 31.018 of them girls).

In 2011, the foreign and repatriate pupils were 79.057 (3.642 repatriates, and from them the girls amounted to 35.973)<sup>6</sup>. Between 2007 and 2011, foreign students are increased, boys outnumber girls, but there is a decline of repatriate Greek nationals.

At tertiary education level, as it is mentioned above, 5% of students are foreigners, which according to OECD is the highest in the region (OECD 2013).

### **4.2 Early School Leaving (drop-out)**

In general, early School Leaving (ESL) has been reduced by 7% (from 18,2% in 2000 to 10,2% in 2013). For boys, ESL has been declined by about 10% and for girls about 6%. Employment plays a role, by men ESL is at 6% and by women at 1,4% (decreased rates).

Additionally, the category, 'not employed men' on the contrary have increased their early school leaving by almost 4% (from 3,9% to 7,7% (in 8 years)) and by women it has been reduced by more than 1% (from 6,3% to 5,8%).

### **4.3 Retention Rate**

According to the Eurydice report, retention in primary education is in Greece very low in relation to the EU 27 countries; at primary education retention rate is estimated to be below 5%, (in 2007-08), when in France, for instance, is almost 20% and in Germany more than 15%; at the threshold from pre-school to enrolment to primary education retention is also very low in relation to other EU countries (below 1%); while at the lower secondary education level, (in 2009) Greek pupils have a 4,2% retention rate, when the average in the EU27 countries is 10,4% (Eurydice 2011: 35, 54).

It seems that the retention rate is in Greece very low, and this is worthy a further examination that exceeds the scope of this text.

### **4.4 Percentage of Adults in Education and in Vocational Training**

The percentage of adults 25-64 years old studying in the education system *has been increasing* during 2000 - 2013 by 1,9% (from 1,0% in 2000 to 2,9% in 2013). Exception to the rule is to be seen in the years 2009 and 2010 during which the percentage was higher than or equal to 3,0% and started declining in 2010 and decreased further in 2011 (2,4%).

The age category 25-34 seems attempting to increase its educational credentials more than any other age category: their increase is 4,5% (from 2,9% in 2000 to 7,4% in 2013) (the increase is similar to both men and women). The age category of 35 to 44 is the second in participation in the education system: their percentage rose by 1,9% (from 0,4% in 2000 to 2,3% in 2013).

The above trend could be also explained by an educational measure in 2011 that prompted the so called 'eternity students' (i.e. those that had not completed their studies within the

allocated time of 6 or 8 years) to enrol again and take exams in order to complete their studies otherwise their right to study would be terminated.

Here I also noticed that in 2011 the respective percentage of adult participation had declined to resume again in 2012. The same process takes place for the other age categories. The year 2011 was relatively the worst in terms of adult participation in education. Accidentally it was the worst year of economic recession.

Generally, the trend is that the *older the generation the less its members participate* in the education system.

#### **4.5 Adult Education at Compulsory Education Level**

Adult education at compulsory education level was set up in 1997 and the schools are named "Schools of Second Chance". At the moment of writing there are 58 such schools all over Greece, but these do not cover all areas of the country as they are situated only in cities. The law 3879/2010 attempts to design an 'atlas' of institutions for adult education throughout Greece and in this direction has set up a General secretariat of life-long learning, indicating that the issue is high on the educational agenda (see also Prokou, 2014b)<sup>7</sup>. The attempts to set up more schools have rather stopped due to the budgetary cuts in education.

In addition, there are not any particular schools for adults at upper secondary education; and there is not any special entrance university exams designed for adults either (Prokou 2014a). That means, adults have to sit the same Panhellenic exams as newly Lyceum (upper secondary education) graduates in order to enter tertiary education.

#### **4.6 Teachers**

In relation to teachers' corps: from the available information teachers' corps before the onset of the crisis was steadily increasing, but after 2010 it has decreased. The available statistical information are detailed for the period that the teachers' corps was increased but the information is rudimentary, when it started decreasing. I examine first the increase.

*Between 2002 - 2007, teachers' corps including the academic staff was increased by 13.000, in total numbers, according to the Eurostat statistics (from 189.128 in 2004 to 202.014 in 2007). The increase is taking place gradually every year and at every educational level, with the exception of pre-primary education, in which only a 100 more kindergarten teachers were employed between 2004 and 2007.*

More specifically, pre-primary education teachers (level 0) were about 12.000, primary education teachers (level 1) were about 62.000, secondary education teachers (level 2-3) were about 86.000, post-secondary teachers (level 4) about 12.000, and *tertiary education teachers and academic staff* (level 5-6) were about 28.000 (see note 2 and 3).

*After 2010, teachers' corps is decreased however by 27,3%, including all categories of teachers at secondary education (level 2-3) according to the Secondary Education Teachers' Union (called OLME) and announced during a Press Conference on 10-9-2014; the press conference was published, in online news services (e.g. see [www.news.gr](http://www.news.gr), [www.esos.gr](http://www.esos.gr)).*

The following tables are based on the information on the aforementioned sites.

**Table B.2 Reduction of Secondary education teachers' corps, per category of employment (2010-2014 (June))**

Teachers/employment category	2010	2014	change	in %
Permanent	94.264	71.346	-22.198	-24,3%
Substitutes	3.829	2.091	-1.783	-45,4%
Part-time	5.950	2.156	-3.794	-63,7%
<b>TOTAL</b>	<b>104.043</b>	<b>75.593</b>	<b>-28.450</b>	<b>-27.3%</b>

Source: OLME 2014 in [www.esos.gr](http://www.esos.gr) (10-9-2014)

More particularly, according to the table above there are three categories of teachers employed, *permanent*, *substitute* and *part-time*: the permanent teachers' corps decreased by 24,3% (in total numbers by 22.918, i.e. from 94.264 in 2010 to 71.346 in 2014 (June)). The decrease of *substitute teachers at secondary education* was 45,4% (from 3.829 in June 2010 to 2.091 in June 2014); and the *part-time employed teachers* decreased by 63,8% in the same period (from 5.950 teachers in June 2010 to 2.156 in June 2014)<sup>8</sup>. In addition, there is a decrease of teachers at the other educational levels due for instance to pensions. An article by an education researcher published in a newspaper, mentions that according to his statistical information, the percentage of primary education teachers decreased by 8,43% between school year 2009/10 and 2014/15 (in total numbers respectively from 74.518 to 68.235) (Katsikas, 2015). Other statistical information is difficult to obtain.

#### 4.7 Teachers' Salaries

In public and private schools basic statutory salary is calculated using the same method (Eurydice 2013/14: 6). Teacher's salaries in primary and secondary education are similar and between 2010 and 2013 were reduced more than once: the reduction of the salaries and pensions was introduced by the law 3833 in 2010 and by the law 4024 in 2011 (Eurydice 2012: 40). In the law of 2010 there was a reduction of 12% in allowances and salaries and 30% reduction in other 'regular' payments (ibid.: 40). Thus, in 2013-14, the minimum teachers' statutory basic salary was 13.134 euro per year and the maximum 24.756 euro (Eurydice 2013/14: 46). The reduction is estimated as being between 35-38%, while taxation, both direct and indirect (e.g. VAT) has risen considerably. OECD estimates the reduction as follow: "gross salaries fell by 17%" (OECD 2013).

Admittedly, Greek teachers are lower paid than their colleagues in the EU 27 countries, whose average salary was 24.205 euro per year (lower secondary education) and 25.404 euro per year (upper secondary education) (Fryktozia 2012: 1, based on Eurydice 2011/12 report).

#### 4.8 Schools

After 2010 the number of schools has been decreasing. More particularly: between 2001– 2010, the number of schools decreased by 71 units; the following years, 2010 – 2014, the number of schools decreased even further by 1.590 units.

**Table B.3a Number of schools 2001-2010 per educational level**

Nr. schools/level	2001	2010	Change
Kindergarten	5.624	6.064	440
Primary schools	6.094	5.440	-654
Gymnasium (lower secondary education)	1.870	1.965	95
Gen. Lyceum (upper secondary education)	1.289	1.361	72
Vocational education	640	616	-24
<b>TOTAL</b>	<b>15.517</b>	<b>15.446</b>	<b>-71</b>

Source: KANEP/GSEE 2013a, pp. 4-8 (based on statistical data from Hellenic Statistical Authority-ELSTAT).

The number of school units *decreased* in ten years' time, primarily, because primary schools and vocational schools merged or closed down; the schools at other educational levels increased slightly, with the exception of the kindergarten that increased by 440 units.

The explanation that is given for the increase of the kindergartens is that it is related to the law application in 2006 that decreed attendance to the kindergarten as compulsory (KANEP/GSEE 2013b: 16).

Statistical information for the following years has not seen the light of publication yet. Estimates appear in media reports and there it is mentioned that there is a *decrease of 1.590 school units after 2010*. According to the education researcher Katsikas (2015), the details are as follow:

**Table B.3b Number of schools 2010-2014**

Nr. schools/level	2009/10	2013/14	Change
Kindergarten	5.700	5.151	-549
Primary schools	5.098	4.331	-767
Gymnasium (lower secondary education)	1.873	1.656	-217
Gen. Lyceum (upper secondary education)	1.265	1.209	-56
Vocational Lyceum	389	388	-1
<b>TOTAL</b>	<b>14.325</b>	<b>12.735</b>	<b>-1.590</b>

Source: Katsikas 2015 (based on statistics from the Hellenic Statistical Authority-ELSTAT)

Here I should note that there is a small discrepancy between the aforementioned tables as to the number of school units referring to vocational education and affecting the total of school units. In table B.3a, vocational training includes all schools (private and public) that offer technical-vocational training, which amounted to 616 units in 2010 (KANEP/GSEE 2013b:32). In the following table, above, B.3b, the vocational lyceum refers only to the public school units (389 units in 2009/10).

## 4.9 Higher Education

During the same period, 2001-2010, tertiary education consisted of 24 Universities and 16 Higher Technological Institutes (*TEI*). Downsizing of tertiary education started in 2013. The ministry of education conceived of a plan called "*Plan Athena*" and attempted to implement it, starting in 2013. The plan was to reduce departments by 66 (from 480 to 384) (Ministry of Education, 2013: 36). When implemented, it meant that one University was closed down (instead of 3 as it was planned) and a few departments. From the planned 384 departments, 134 in TEI and 250 departments at the Universities, we see that in the beginning of the academic year 2013-14 there were 261 University departments according to the Hellenic Statistical Authority (ELSTAT); the TEI however lacks at the aforementioned data base.

Thus, merging and closing of departments was not implemented to the degree that it was planned also due to the vehement reaction of students and faculty at universities and TEI.

*In short:* the data points to an increase of student population even in conditions of crisis, but closer look reveals a decline in younger ages and differences in pace also in regard to adult participation in education. Furthermore, there lacks statistical information on special needs education, schools at compulsory level for adults, and student with disabilities after 2005. In addition, data shows that educational measures affected school units that have closed down; information on the press also mention that students are not able to be transferred to another school because for example of lack of means of transportation; next, teachers are driven away, while of those remaining in education, the remuneration has been considerably reduced; work load has been increased and to my knowledge this is not depicted in any statistical information yet.

Last but not least, there is no indication however about the quality of education being touched upon, for as it happens in other countries, citizens' resilient capacity has already become apparent, as other studies show. By this I mean the '*social phrontistaria*' (private preparatory school) and the thousands of volunteer help actions that are geared towards pupils and their families who are 'in need' (see also Kantzara, 2015).

## 5. Final Notes and Conclusions

**T**he overall impact of the crisis on education is examined in several aspects of education, for which there is available statistical data. The ramifications are visible in terms of funding and school units, administration and education personnel, but it is not so visible, if one examines the data in terms of equity. A reason for this is that we need a larger span in years to view the changes in education and those especially attributed to the crisis. The second reason is that one needs statistical data on subjects that are not readily available, for instance changes in the 'infrastructure' of education, that is not only buildings and facilities, but for instance retention and delay rates, access to education for adults, students with disabilities, migrants and various ethnic minorities.

The Greek education system seems to have an egalitarian character on two dimensions, *access to education and success*, in terms of acquiring educational qualifications. Student selection throughout primary and secondary education is on the whole minimal while the policy of tuition free attendance and rudimentary financial help to students form conditions that contribute to equity. However, a certain cultural capital in the family and a good financial



condition help the offsprings to enter university and to pursue post-graduate studies. It is not coincidence that the bulk of the students in higher education come from a higher middle and an upper class background. In other words, students coming from less privileged environments, cultural or economic, do not access higher education in equivalent numbers as their counterparts of other social classes (Sianou-Kyrgiou, 2006, 2010b). This also holds true for the descendants of immigrants, minorities, as for example the Muslim minority, Roma, migrants, students with disabilities, and adults. Specific data on these students is not readily available, but students from these categories, who are affected by the financial cuts in education (and also in health) that refer to infrastructure facilities and compensatory education. Additionally, students coming from disadvantaged backgrounds lack the means to find hired help or attend a 'phrontistirio', the private preparatory school. It should be noted here that teachers with the help of local authorities have set up 'social phrontistirio' centres where students are able to attend for free. The effects of these centres on success in education are worthy to be studied.

*The most evident and direct effect of the crisis on education includes budgetary cuts, and educational reforms.*

*In regard to budgetary cuts:* it denotes reducing public funding on education. Students as well as foreign students and migrants, may find obstacles in their studies: for example financing transport may be stopped because of lack of funds; schools in poor areas may have no heating in the winter; foreign language text books are not readily available, and compensatory education has been stopped; at university level, the right to free textbooks and other study material has been curtailed.

A second effect related to budgetary cuts is the diminishing of the education personnel, as well as the severe salary cuts these underwent. A third less known impact is that almost no new teachers are appointed at all levels of education; a fourth, again less known effect is that places available for pre-kindergarten education are severely limited; a fourth, the workload on teachers has been enormously increased in terms of teaching hours and administration. In addition, the administrative personnel has been also reduced (see also Kantzara, 2014, Prokou, 2014a).

A third effect is related to policy *measures and reforms*: two waves of reorganising ('shrinking') education took place. One part of measures referred to primary and secondary education and one to tertiary. After 2011, the reforms referred to buildings, school units, university departments and personnel, especially in primary but mostly in secondary education.

Before the onset of the crisis, the Greek education was characterised by expansion at all levels and in many aspects. After the onset of the crisis education system is being downsized, control and management mechanism alter and this affects the relation of the central government to education. Education is being all the more governed from 'a distance' (Kantzara 2011b).

In general, the Greek education system seems to support equity, *favouring those who are more equal socially than those who are not*. The latter categories rely on civil society's organisations and volunteer's work in order to continue receiving an education and have success during the crisis.

The above mentioned effects of the crisis may have *implications for learning and for the quality of education provided* (Kantzara 2011a); this subject exceeds however the focus of the present text.

In conclusion, one could argue that the ramifications of the crisis on education are manifold, and the study of these has just started. The *main conclusions point to the varied effects social conditions posed by a phenomenon called crisis on education*. At micro and meso level, education

has been affected, as changes took place regarding funding, school organisation, management of tertiary education, administration and education personnel. At a macro level, access to and success in education seem less affected, the rate continues to rise but the pace is much slower than before the onset of the crisis. In addition, if we look closer at the data, the age category '25 and above' is responsible for the increase in the educational attainment after the onset of the crisis. Taken together with statistics on employment, this age category was severely affected by a high unemployment and it is very probable that either they migrate abroad or has gone back to school to start or to continue their previously interrupted studies. This means that data from different areas of life have to be studied in order to ascertain the degree and level of the ramifications of the crisis on education.

In addition, the resilience of the Greek society, the education system and its people, whose continuous efforts are geared towards keeping kids at school and students at higher education institutions, may explain some of the effects. The resilience of the education personnel, students and their families together with solidarity organisations of civil society ensured that education as far as possible retained an equity character, perhaps not the one closest to one's ideals and dreams, but at least close to the levels before the onset of the crisis in 2009. The study on this subject is worthy to continue and poses a challenge both theoretically and empirically.

## Notes

- \*. This article is based on the Greek National Research Report I completed in 2015 as part of the research project titled "*Educational Challenges in Southern Europe. Equity and Efficiency in a Time of Crisis*". The project was developed, hosted and run by the *CIES-Instituto Universitário de Lisboa* (University Institute of Lisbon) in 2013-2015. From here, I would like to thank *Dr. João Sebastião*, Diretor do Centro de Investigação e Estudos de Sociologia, and his colleagues members of the research team of the project at the ISCTE-University Institute of Lisbon.
- 1. The statistical data was provided to me by the Portuguese research team of the project (see note 1) and comes mainly from Eurostat, unless otherwise stated. The exact online address has changed, for Eurostat has recently altered its database. The data comes from the theme now called 'Education and Training'; the data was at [epp.eurostat.ec.europa.eu/portal/page/portal/education/data/database](http://epp.eurostat.ec.europa.eu/portal/page/portal/education/data/database)
- 2. Austerity measures are criticised for their impoverishing effects on millions of people. Bauman (and other sociologists) argued in an interview that these measures constitute an income redistribution that favours the privileged.
- 3. As mentioned before (see note 2), the Eurostat online database has changed address, but also the collection and calculations of statistical information has altered. The data I checked was according to the International Standard Classification of Education (ISCED) of 1997, while the current one (in 2016) in the Eurostat database is according to ISCED of 2011. The differences and the implications exceed the scope of this article.
- 4. [www.panteion.gr/index.php?p=content&section=17&id=148&lang=el](http://www.panteion.gr/index.php?p=content&section=17&id=148&lang=el) [in Greek] (accessed on 15-2-15).
- 5. See [www.statistics.gr/portal/page/portal/ESYE/PAGE-themes?p\\_param=A1404](http://www.statistics.gr/portal/page/portal/ESYE/PAGE-themes?p_param=A1404).
- 6. [www.statistics.gr/portal/page/portal/ESYE/PAGE-themes?p\\_param=A1401](http://www.statistics.gr/portal/page/portal/ESYE/PAGE-themes?p_param=A1401).
- 7. The site of the institute responsible for the 'Schools of Second Chance' is at [www.inedivim.gr](http://www.inedivim.gr).

8. According to the Press conference of OLME (Secondary Education Teachers' Union) in [www.esos.gr/arthra/defterovathmia-ekpaidefsi/eidisis-defterovathmia-ekpaidefsi/pinakes-me-th-meivsh-ekpaideytikvn-kata-eidikothta-thn-teleytaia-tetraetia](http://www.esos.gr/arthra/defterovathmia-ekpaidefsi/eidisis-defterovathmia-ekpaidefsi/pinakes-me-th-meivsh-ekpaideytikvn-kata-eidikothta-thn-teleytaia-tetraetia); see also Kalogiros, 2014.

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## Biographical Note

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# Le travail triangulaire<sup>1</sup> en Grece: Certains cas de travail triangulaire dans la fonction publique<sup>2</sup>

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## Περιπτώσεις τριγωνικών σχέσεων εργασίας στον δημόσιο τομέα στην Ελλάδα

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### ABSTRACT

Our work hypothesis is that the hegemonic employment model in Greece, which safeguarded employment and strong legal protection for the majority of employees, is in a process of transformation to the opposite direction. In the special conditions created by the policies of internal devaluation under the supervision of the troika, work relations are in a process of change in both the private and the public sector: The institutional protection of employment is "freezing", and its place is occupied by special regimes, created through the application laws following the successive memoranda imposed by the governments of the last few years. Thus, the employment model tending to generalise in Greece at present, i.e. work with little or no institutional rights, was already in existence during the previous period, but concerned a small part of the active population. The consequence of the abolition of fundamental work rights, is the renewal of the larger part of wage labour through precarious work regimes.

**KEY WORDS:** Labour model, temporary labour, trigonal work relations, precarious work regimes, public sector, social work, "beneficiaries".

### ΠΕΡΙΛΗΨΗ

Κατά τη περίοδο 2010-2015 στην Ελλάδα λαμβάνει χώρα ο μετασχηματισμός του ηγεμονικού, πριν τη κρίση, μοντέλου εργασίας, το οποίο εξασφάλιζε τη σταθερότητα στην απασχόληση της πλειοψηφίας του ενεργού πληθυσμού. Σε συνθήκες εσωτερικής υποτίμησης με την εποτεία της Τροϊκά δρομολογήθηκαν αλλαγές όπως η απότομη μείωση της αξίας της εργασίας, η γενικευμένη επισφάλεια της εργασίας ακόμα και στον δημόσιο τομέα η δυνατότητα των επιχειρήσεων να μισθώνουν προσωπικό μέσα από ιδιαίτερα επισφαλή καθεστώτα εργασίας (ενοικίαση, ανάθεση, απόσπαση εργαζομένων). Στη μελέτη περίπτωσης που παρουσιάζουμε η «κοινοφελής» εργασία συνιστά μια νέα μορφή προσωρινής εργασίας στο Δημόσιο τομέα. Οι συμβάσεις του Δημοσίου με τους λεγόμενους « πενταμηνίτες» έδωσαν τη δυνατότητα στις δημόσιες υπηρεσίες να ικανοποιήσουν τις ανάγκες τους με δεδομένη την μεγάλη απώλεια προσωπικού που υπέστησαν. Όμως οι «πενταμηνίτες» δεν διαθέτουν τα δικαιώματα που προβλέπει η εργατική νομοθεσία.

**ΛΕΞΕΙΣ-ΚΛΕΙΔΙΑ:** Μοντέλο εργασίας, δανεισμός εργαζομένων, προσωρινή εργασία, ενοικιαζόμενη εργασία, τριγωνική εργασία, κοινοφελής εργασία, εξωτερική ανάθεση, «πενταμηνίτες».

## Introduction: Hypothèses du travail

Le modèle prédominant d'organisation du travail, pendant les décennies de la forte croissance, a gravité autour de ce qu'il est convenu d'appeler l'emploi typique, c'est-à-dire celui qui est caractérisé par une relation de travail binaire, à temps complet, pour un seul employeur, pour une durée indéterminée, s'étendant parfois sur toute la vie et s'exerçant sur les lieux de travail de l'employeur. Puis, se sont développées et multipliées diverses formes d'emploi s'écartant de ce modèle fondé sur l'unicité d'employeur et de lieu et sur la continuité dans le temps.

L'objectif de notre étude est le travail précaire dans un sens général et plus spécifiquement le travail triangulaire et sa pénétration dans le secteur public par des moyens qui vont au-delà de la législation du travail. Nous allons examiner un nouveau type de travail qui a été introduit dans la fonction publique pour créer de l'emploi temporaire et couvrir les besoins du secteur, après la diminution brutale de son personnel. Ce rapport au travail, financé par des Programmes Européennes, a permis à la fonction publique d'embaucher plus que 100 mille travailleurs au cours des années 2012 et 2015<sup>3</sup> à travers le Programme du Travail Social (Koinofeli Ergasia) d'une durée de 5 mois de travail pour chaque embauché(e).

Notre hypothèse de travail est qu'en Grèce le modèle de travail dominant hégémonique en quelque sorte, basé sur la stabilité de l'emploi et la forte protection législative pour la plus grande partie des travailleurs (Karamesini Maria, 2011 Kouzis Ioannis 2008), est en voie de transformation dans le sens inverse. Bien que les formes d'emploi précaire ont été bien avant la crise, un élément structurel du marché de travail du pays, se concentrant presque exclusivement sur les jeunes, les femmes et les immigrés, ca restait en quelque sorte en marge du système dominant du travail institutionnellement protégé. Cette hypothèse prend tout son sens dans les conditions particulières de la Grèce sous Troïka<sup>4</sup>: les relations au travail sont en pleine transformation aussi bien dans le secteur privé que dans le secteur public : les instances qui protégeaient d'un point de vue institutionnel le travail sont «gelées» et à leur place sont établis de régimes spéciaux qui permettent l'application de mémorandums successifs imposés et signés par les gouvernements grecs<sup>5</sup>. Ainsi le modèle de travail généralisé actuellement en Grèce tend de se rapprocher au modèle déjà existant mais minoritaire c'est-dire au travail sans ou avec peu de droits institutionnelles.

Etant donné l'abolition fondamentale des droits de travail institutionnels<sup>6</sup>, le salariat du pays entier se renouvelle, par des statuts précaires. L'année 2013 la presque totalité du personnel du secteur privé se vue renouvelé: 1, 015,706 des travailleurs soit ils ont été licenciés soit ils sont partis volontairement, souvent en pré retraite pour éviter les prévisions de diminutions de retraites. Et à leur place ont été recrutés 1, 149,194 travailleurs neufs<sup>7</sup>. Or tandis qu'en ce qui concerne les départs, la relation dominante était celle du travail typique à pleine temps, chez les nouvelles embauches pour l'année 2013, 4 sur 10 (46,5) de nouveaux postes sont soit de postes de travail partiel (37,5%) soit de postes de travail en alternance (9,5%). Pareil pour l'année 2014 pendant laquelle le 50,5 % de nouveaux postes sont de postes de travail partiel (36,16%) ou de postes de travail en alternance (14,34%). Et même pour l'année 2015 ou 55,5 % de nouveaux recrutements sont soit de contrat de travail partiel (37,44%) soit de contrat de travail en alternance (18,07)<sup>8</sup>. En ce qui concerne le secteur public le trait générale est la diminution raide de son personnel (-200.000 entre 2010-2014)<sup>9</sup> à travers les restructurations, l'emploi de sous-traitances, mais aussi de nouvelles formes de travail intérimaire telle celle que nous nous allons présenter.

Le type de travail que nous allons présenter montre une forme extrême du travail précaire que le secteur public a proposé aux chômeurs et au même temps aux services sociaux et publics pour couvrir leurs besoins après le brutale amaigrissement de leur personnel.

Notre méthodologie exploite en partie la bibliographie académique mais aussi la documentation grise sur la matière et aussi quatre (4) interviews semi-directives avec de «bénéficiaires» du Programme du travail social. Les interviews ont été menées dans un lieu public neutre et ont duré entre 60 et 120 minutes. Nous avons utilisé le magnétophone et le choix des informateurs a été faite de manière à couvrir différents domaines du secteur public.

## 1. Le travail intérimaire en Europe: Certains traits généraux<sup>10</sup>

L'intérim est une relation «triangulaire» entre un travailleur, une entreprise agissant en tant qu'agence intérimaire et une entreprise utilisatrice, dans laquelle l'agence emploie le travailleur et le place à la disposition de l'entreprise utilisatrice. Au-delà de cette définition de base, la situation varie considérablement de pays à pays. La croissance du travail intérimaire est l'expression la plus récente de l'augmentation des formes d'emplois atypiques observées dans l'UE pendant les années 90. Au cours de cette décennie dans presque tous les Etats membres, le taux du travail a doublée, ou même quintuplée. Les rapports d'études concernant ce type de travail en Europe mettent en lumière la diversité de situations et définitions nationales, mais aussi certaines tendances communes.

L'importance du travail intérimaire varie selon les Etats membres. A la fin des années 90 trois pays –Pays Bas, France et Royaume-Uni–représentent environ 70% du nombre total dans l'UE (2,080 millions en 1999, ce qui correspond à 1,4% de l'emploi globale dans l'UE de 15 Etats membres, (Donald Storrie EUROFOUND, 2002). C'est en France que ce nombre est le plus élevé (623 000) alors que c'est aux Pays-Bas que le recours au travail intérimaire est le plus intensif (4%). Pendant cette période le travail intérimaire est fortement représenté chez les jeunes et les travailleurs sont dans la majorité des hommes, distribution due au fait que ce genre de travail se concentre surtout dans les secteurs de l'industrie et du bâtiment. Or dans les pays scandinaves le travail intérimaire concerne surtout les services.

Cinq ans plus tard (2007) l'étendu du travail intérimaire continue à augmenter de manière considérable dans la plupart des Etats membres et il emploie un grand nombre de travailleurs, surtout en Belgique, en France, en Allemagne, en Italie, aux Pays-Bas, en Espagne et au Royaume-Uni. Il s'agit d'une branche qui enregistre de rapides taux de croissance, tant en nombre d'employés qu'en termes de recettes dans le secteur (Christian Welz, EUROFOUND, 2010). Aussi une branche qui emploie un partie grandissant –mais minoritaire toujours par rapport à l'emploi globale–de son personnel par des travailleurs âgés plus que 45 ans. Enfin avec une variation des pays par secteur qui envoie à une distribution de la main-d'œuvre intérimaire par sexe: En Autriche en Allemagne et en France le travail intérimaire concerne l'industrie et les hommes tandis que dans les pays scandinaves la main-d'œuvre intérimaire est féminine et plus occupée dans les banques et la finance (EUROFOUND, 2009).

Selon le Rapport d'enquête de 1999 sur le travail intérimaire à l'UE de 12 Etats membres (EUROFOUND, 2002), la Grèce était le seul pays membre de l'UE dans lequel le travail intérimaire était interdit. Ainsi aux tableaux cités la Grèce figure avec aucun travailleur intérimaire. Pourtant le travail intérimaire existait déjà à cette époque en Grèce, mais contrairement aux autres pays,



n'était pratiquement pas réglementé. Les entreprises de travail temporaire existaient et opéraient sans licence (Michon, F., 1999)<sup>11</sup>. Par la suite dans le rapport d'enquête de 2008 (EUROFOUND, 2009), selon les tableaux cités, la Grèce dispose 8,172 travailleurs intérimaires et un taux de croissance de ce genre de travail entre les années 2004-2007 de 133,3%.

La directive Bolkestein votée par le Parlement européen en 2006<sup>12</sup> relative a la libéralisation des services a favorisé le développement du travail intérimaire puisque les services aux entreprises ainsi que le travail temporaire et le recrutement du personnel sont définis en tant que services qui peuvent «circuler» librement dans le «le marché intérieur» de pays européens, offertes par les prestataires de différents pays (Th Sakellaropoulos-A Stergiou 2012, MEDEF, 2015)<sup>13</sup>.

Même si en principe le travail intérimaire est récent par rapport à d'autres contrats de travail atypiques, dans la pratique, il semble plus précaire que par exemples les contrats à durée déterminée. Malgré le cadre juridique<sup>14</sup> en place dans plusieurs Etats membres selon lequel les travailleurs intérimaires doivent bénéficier du même traitement que ceux dans l'entreprise cliente, on voit que le salaire est inférieure pour un travail semblable et que les normes concernant les salaires et les horaires de travail sont contournés (Donald Storrie, 2002, ETUC, 2012, Harlem Désir, 2008, Lampousaki, S., 2009).

Malgré la terminologie confuse du «travail temporaire» et du «travail intérimaire» (les termes sont souvent utilisés de manière imprécise), les réalités nationales diffèrent sur de nombreux aspects. En outre, l'intérim, n'est pas le seul type de relation triangulaire liant un employé, un employeur qui a signé le contrat de travail de l'employé et un autre employeur pour lequel travaille l'employé. Il existe plusieurs autres relations de ce type, moins reconnues, à la périphérie de l'emploi rémunéré. Ces relations ne sont parfois couvertes par aucune expression ou définition juridique, même si souvent, elles sont moins en infraction de la législation que simplement en dehors de son domaine d'application (François Michon, 1999, Kouzis, 2009:15, Agrapidis, 2006:79).

## 2. Le travail intérimaire en Grèce

**L**e travail intérimaire selon diverses sources non officielles concernait en 2009 50,000 travailleurs, (les années '90 concernait seulement 1500) ayant décuplé sa taille, tandis qu'à partir de 2010 il touchait plus que les 80,000 personnes. La loi qui détermine les conditions de travail des intérimaires date de 2001 (la loi 2956/2001)<sup>15</sup>

Selon la loi initiale la durée du travail à l'employeur indirect ne pouvait dépasser 8+8 mois. Le renouvellement pour une fois était possible sans changement du contrat (CDD). Or par la suite si la durée dépasser les 8+8 mois l'employer était obligé de modifier le CCD a CDA. Le premier mémorandum<sup>16</sup> a renforcé le travail intérimaire par différents dispositifs: En augmentant l'étendu de la période de location de 16 à 36 mois, par l'extension de 6 à 9 mois par an de la durée du travail en alternance (4-jours et 3-jour de travail). En plus la location du travail a été renforcée par le second mémorandum. Selon les modifications de la loi (4052/2012, 4093/12) les travailleurs intérimaires peuvent être «loués» par l'employeur indirect sans que les fonctions remplies par les intérimaires soient occasionnelles ou saisonnières, ou urgentes. L'employeur indirect peut avoir recruter de travailleurs intérimaires juste 3 mois après avoir licencié de «vieux» salariés de la même spécialité (6 mois avec la disposition précédente), pour de raisons économique-techniques»

et dans le cas des licenciements collectifs le recours au travail intérimaire peut avoir lieu 6 mois après les licenciements (à douze mois selon la disposition précédente).

Dans le cadre de la loi fonctionnent aujourd'hui environ 40 entreprises qui embauchent de travailleurs pour les «passer» ensuite à d'autres entreprises. Les banques utilisent très souvent ce genre de travail puisque selon des estimations fiables le 5% du personnel de banques, est intérimaire mais encore plus souvent le tourisme, l'hôtellerie et le secteur informatique. Selon certaines estimations les dernières années 2010-2014 le travail intérimaire gagnera une énorme croissance.

Pourtant nous ne nous disposons pas d'information fiable sur l'ampleur du travail intérimaire. Les chiffres réels sont beaucoup plus élevés. Il existe de nombreuses agences non enregistrées, des agences factices n'ayant qu'une seule entreprise pour client qui elle, transfère ses travailleurs pour les réembaucher par la suite avec des conditions de travail dévaluées<sup>17</sup>.

## ***2.1 Le travail triangulaire dans le secteur public***

### ***2.1.1 La précarisation généralisée de la fonction publique***

Au cours de la dernière période que la Grèce est sous les mémorandums, le secteur public se rapproche de plus en plus au secteur privé en ce qui concerne les droits institutionnels du travail: Les grandes entreprises d'utilité publiques (électricité, télécommunication, énergie) et d'autres organismes qui étaient dépendants de l'état sont devenues des entreprises privées ou avec de statut intermédiaire et leurs employés sont devenues des employés du privé. Sont abolies les Réglementations du Personnel, est supprimée la négociation collective et la clause de la sécurité du travail dans le secteur parapublic<sup>18</sup> en rapprochant les conditions du licenciement avec ce qui existe dans le secteur privé. Au même temps les effectifs du secteur public sont brutalement diminués à travers différentes politiques: Tout d'abord par un grande vague de départs en retraite précoce à cause des nouvelles prévisions de diminution de retraites. Ensuite par la suspension des nouvelles embauches à tout secteur de la fonction publique (santé/éducation/administration centrale et locale). Ensuite une partie considérable du personnel employé dans le secteur public est jugé redondant<sup>19</sup> à travers la restructuration de tous les secteurs de la fonction publique selon le plan dicté par Troïka pour réduire les effectifs par le licenciement de 150, 000 personnes. Objectif plus qu'accompli puisque le secteur public a perdu, au cours de années 2010-2014, 200 000 employés : Les restructurations concernent les différents composants du publique: les universités, les hôpitaux, les territoires locales, toutes les ministères.

Une partie des employés du secteur public sont mis sous réserve avec un statut de préretraite obligatoire (environ 20.000 employés) et une partie des employés sont placées au régime de «disponibilité-mobilité» (12,500 employés jusque a la fin de 2013 selon l'engagement du Ministre avec Troïka) dont une partie a été ou sera licencié à la suite de la suppression de leur organismes, ou de leur fonction (engagement pris pour 15,000 licenciement au cours de 2014)<sup>20</sup>. Cette politique a été dirigée pour une première phase à tous les contractuels avec CDD, dont leur contrat de travail n'a pas été renouvelé. Par la suite en tant que «groupe cible» étaient placés les employés avec CDI et ayant de titres scolaires secondaires. Par la suite l'amaigrissement des effectifs a visé tous les niveaux de diplômes et de qualification puisque de branches entières du publiques ont été supprimées ou des organismes-services abolies. A titre indicatif: pour l'année 2013 ont été supprimées 2,114 postes d'enseignants du secondaires, 2,234 des gardiens d'école, 53 employés du Ministère de Reformes Administrative, 1672 employés du Ministère de la santé,

3,521 postes de la police municipale, 2500 postes de ERT (le Service Nationale de Radiotélévision) Les licenciement ont été réalisées après des évaluations prononcées à la base desquelles des organismes sont jugés inutiles et les travailleurs excédents<sup>21</sup>.

### 2.1.2 La sous-traitance dans la fonction publique<sup>22</sup>

Le rapport au travail triangulaire n'est pas un «privilege» seulement des entreprises privées puisque le secteur public utilise aussi largement ce genre de travail mais avec la forme de la sous-traitance. Au cours des années 2005-2010 plusieurs entreprises de statut public (énergie, banques, communication, défense) recrutaient à travers de contrats de sous-traitance un partie de leur personnel. En général, le recours au travail de sous-traitance dans le secteur public est censé être limité aux secteurs de la sécurité et du nettoyage. Pourtant de nombreuses entreprises du secteur public recrutent du travail «sous-loué» pour plusieurs fonctions en exploitant les lacunes laissées par la loi (Kouzis, 2009: 10, Agrapidas, 2006 :79 Actuellement la sous-traitance a pénétré dans les ex sociétés d'utilité publique mais aussi dans les universités, et les autres organismes du secteur public (hôpitaux), surtout dans les postes de nettoyage et de gardiennage qui sont servies entièrement par des entreprises sous-traitantes.

Pourtant là aussi nous avons de changements important: Selon une dernière disposition (Février 2014) législative qui a été insérée dans la lois adaptive du deuxième memorandum signé par le gouvernement Grec, les entreprises de travail intérimaire ont droit à «louer» de travailleurs aux entreprises qui réalisent des projets, et de travaux publics , financés par des ressources nationales et menées après subvention ou contrat de travail au nom de l'État, par des sociétés d'utilité publique, l' administration locale, les entreprises municipales et les organismes du secteur public plus large<sup>23</sup>. La disposition prévoit expressément que peuvent être utilisés des ouvriers/ techniciens au bâtiment dans de travaux publics de budget initial de 10 millions d'euros ou plus, qui sont financés ou cofinancés par des fonds nationaux. Les travailleurs du bâtiment dans les travaux publics vont être payés, selon la disposition, avec «le salaire de memorandum» pour une période de location de 36 mois, sans droit d'indemnité.

Au même temps selon la lois 3845/10 l'état peut subventionner des entreprises de travail temporaire pour embaucher de chômeurs de longue durée âgés de 55-64 ans pour travailler (sous-loues) dans secteur public<sup>24</sup>.

Etant donne les engagements du gouvernement grec de l'époque envers Troïka en ce qui concerne la réduction continue des nombre fonctionnaires, à part les licenciements (15,000) prévues pour la fin de l'année 2015, ont été prévues de nouvelles sous-traitances. Le ministère de l'Administration Publique s'est engagé d'avancer des études sur la diminution du cout dans la fonction publique a travers le outsourcing vers des entreprises privées et le remplacement de fonctionnaires par des travailleurs intérimaires jusque a la fin de l'an 2015<sup>25</sup> Ainsi s'explique le fait que les licenciements qui se réalisaient tous les jours dans le secteur public<sup>26</sup> s'accompagnaient de déclarations selon lesquelles les postes de travail ne seront pas perdues parce que d'autres, travailleurs neuf vont prendre les places de licenciés et ainsi le chômage n'augmenteras pas.

### 2.1.3 Les programmes d'emploi communautaire (koinofelis ergasia) en tant que nouvelle forme de travail triangulaire dans la fonction publique

L'objectif de ces programmes qui ont démarré le 2011 «est la création immédiate de nouveaux postes de travail de pleine emploi au niveau local, ainsi que l'amélioration de la qualité de vie de

sociétés locales avec de services à caractère publique à travers de acteurs de la société civile». Il s'agissait de programmes subventionnés par l'UE à travers l' ESPA- Cadre National de Référence Stratégique<sup>27</sup>-qui permettaient à tout le secteur public (les Municipalités, les Ministères, les Régions, les hôpitaux, à toutes les organismes publiques même à L' Eglise) de recruter du personnel pendant 5 ou 7 mois avec des droits très réduits et les licencier une fois que le programme se terminait sans aucune indemnité.

Ces Programmes dont le deuxième était en train de se réaliser à la période de notre enquête<sup>28</sup> ont offert 107.000 postes de travail aux chômeurs appelés «bénéficiaires» (57,000 et 50,000 bénéficiaires) de toutes qualifications et à tous les niveaux éducatifs (certificat d'études, secondaire, universités).

Pour le premier vague de koinofelous ergasias (travail social) les 57.000 bénéficiaires sont recrutés par l'intermédiaire des ONG et d'autres associations non lucratifs (selon le décret ministériel se sont les agences de la société civile), qui vont bénéficier le 5% du financement de chaque «bénéficiaire». Ensuite les bénéficiaires sont placées à différents organismes publiques pour travailler. Leur placement au poste de travail et à l'organisme<sup>29</sup>, se faisait selon un système de sélection qui liait les crédits du chômage (ancienneté au chômage), la situation familiale, les revenus familiaux, la qualification, et les préférences. Conformément aux objectifs du Programme formulés à son proclamation, le programme ne doit pas couvrir de besoins permanents et fixes des organismes bénéficiaires.

Pour les «bénéficiaires» du premier Programme (2011-2012) ont été remboursées les cotisations de la sécurité sociale (du travailleur et de l' employeur) et l' allocation de 625 euro par mois- inférieur au salaire de base garantie par la Convention Collective National qui encore n' était pas supprimé<sup>30</sup>, (le salaire garanti était encore a 751 euro), indépendamment de la qualification du travailleur, de son ancienneté, de son état social, sans les droits accordés par la législation du travail: allocation de mariage, d' enfants, d' études, d' ancienneté, congés, congés de maladie. Par ailleurs, dans le cadre du contrat signé entre l'employeur indirect et l'employer direct était prévu la possibilité de l'employeur indirect de déplacer a volonté le «bénéficiaire» selon ses besoins, ainsi que l'exemption temporaire ou permanente de l'obligation de l'employeur indirecte de verser l'indemnité de salaire tant qu'il n'a pas déjà été versée à l'employer directe la subvention attendue se fonds provenant de ESPA. Cette dernière disposition permettait à l'employer directe de ne pas payer les travailleurs intérimaires très longtemps après la fin de leur mission de travail.

Ce type de travail-sans contrat- entre le travailleur et son employeur- le contrat était passé entre le employeur indirect et l'employer direct, est un cas net de travail intérimaire dans la fonction publique, qui a permis aux employeurs directes, les diverses ONG et associations –en fonctionnant en tant qu' entreprises de travail temporaire de bénéficier une grande partie de ressources nationales et européennes, et aux organismes du public de couvrir bien ou mal leurs besoins immédiates créés par la diminution brutale de leur personnel. Pourtant ce genre de travail intérimaire dépouillé de droits dans le secteur public a provoqué de réactions politiques et de mobilisations sociales au niveau national mais aussi localement, qui ont eu comme conséquence, à certains cas, une certaine amélioration de son conditionnement mais aussi certains modifications de son exercice au cours de la deuxième vague du Programme. La critique portait sur la surexploitation subie par les intérimaires au sein du rapport de travail triangulaire, sur son caractère de travail exclu de droits, mais aussi sur la possibilité de spéculation offerte par l'Etat aux diverses ONG, associations, entreprises soit disant non lucratifs, de s'approprier des

fonds publics, aux dépens des travailleurs et de l'ensemble de la société dans les conditions de l'extrême austérité. En plus les enquêtes journalistiques et les critiques politiques ont montré que bon nombre de ces entreprises étaient quasi-inexistantes mais pourtant elles s'approprièrent des fonds publics, par la relation privilégiée qu'elles entretenaient avec certaines personnes de parties au pouvoir.

Le deuxième Programme (2013-2014) de *koinofelous ergasias* (travail social) a offert aux chômeurs-bénéficiaires 50,000 emplois, de même dans divers services et organismes du secteur public. Le principe est le même mais avec certaines différences: Le salaire est baissé à 490 euro par mois pour les plus de 25 ans et à 427 euro pour les jeunes jusqu'à 25 ans (entre temps le salaire garanti est baissé). Par ailleurs, à la suite- nous estimons –des protestations provoquées pour le rôle parasitaire des organisations à but non lucratif, le rôle de l'employeur directe a été donné à l'Agence Nationale pour l'Emploi, qui reçoit les demandes de chômeurs-bénéficiaires et paye leur salaires et les allocations de sécurité sociale aux employeurs (agences surveillantes). Une autre différence avec la première vague de *koinofelous ergasias* est que les bénéficiaires touchent leur allocation plus régulièrement mais toujours avec un retardement, après l'indignation et les mobilisations provoquées par les bénéficiaires qui demeuraient non-payés indéfiniment. Par contre l'objectif formulé à la proclamation du premier Programme selon lequel, les bénéficiaires ne doivent pas avec leur travail couvrir des besoins permanents et fixes des organismes publics bénéficiaires, cette disposition a été enlevée.

Un cas de mobilisation qui a abouti à une meilleure situation de travail pour les travailleurs de «pentamina» (5 mois) nous est témoigné par des pétitions et de documents publiés sur internet. À l'initiative d'habitants de Kesariani, (« Initiative d' Habitants de Kaisariani») une petite ville à l'est d'Athènes, la Mairie de Kesariani a décidé d'accorder à tous ses travailleurs avec de «pentamina» leurs droits selon la législation du travail: «mettre en place le droit du travail duquel les travailleurs de *koinofelous ergasias* sont essentiellement exclus, leur accorder 2 jours par mois de congés, et de congés de maladie, sans diminution de leur salaire. Signer avec les travailleurs de *koinofelous ergasias* de contrats individuels de travail de durée déterminée». Cette décision est venue à la suite d' une mobilisation d' habitants pour soutenir un travailleur-bénéficiaire qui a été licenciée parce que il ne voulait pas travailler au poste dictée par la Mairie (service de clients) en revendiquant à être placé au poste prévue de sa qualification (ingénieur en informatique). Il a été licencié et au même temps radié du registre de chômage. L'Inspection du Travail à laquelle le licencié a fait appel, a jugé le licenciement illégal et a imposé le paiement des salaires dus par la Mairie. La mobilisation dynamique des habitants a conduit à une décision unanime au Conseil Municipal (c'était peu avant les élections municipales) de paiement des salaires dus par la Mairie au licencié. Et au même temps la mise en place d'une réglementation qui définit de droits au profit du personnel employé par la Mairie à travers les *pentamina*.

Nous présentons par la suite les quatre (4) services publics ou parapublics dans lesquels nos interviewés ont travaillé en tant que «bénéficiaires» de «*koinofelous ergasias*» (travail social). À l'intérieur de chaque service nous présentons leur trajectoire éducative et professionnelle, le contenu de leur travail, les conditions du travail à leur service, et les conflits émergés au cours de leurs contrats. Au moment de notre enquête (April-Mai 2014) les 3 «bénéficiaires» «avaient terminé leurs missions tandis que pour le quatrième sa mission se terminait en Septembre 2014

### 3. Certains cas de services publics ou parapublics

#### 3.1 Le Ministère de la Culture: Le Musée d'Art Populaire

Le Musée avec ses annexes, emploie un personnel de 100 personnes environs et constitue un de musées importants du pays. Récemment un partie de son personnel a été licencié ou mis au «réservoir» de retraite. Le Musée a embauché (employeur indirect) 30 personnes avec le même statut mais recrutés par l'intermédiaire d'employeur direct différents.

Giannis, qui a 30 ans, a fait ses études universitaires et son Master aux sciences des Communications. Il a travaillé depuis la fin de ses études soit au travail non déclaré (délivreur) soit avec de contrats de mission (Service Statistique), soit avec de contrat a durée déterminée (CDD). Il a déposée son dossier en répondant à l'appel d'offre du Ministère de la Culture, pour un poste intérimaire de 7 mois au Musée d' Art Populaire par l'intermédiaire (employeur direct) de la F. H., une association culturelle a caractère non lucratif.

Giannis Il a été recruté en tant que «ouvrier généraliste» mais il travaillait dans le secteur publicitaire du musée, en préparant des bulletins d'informations et en faisant de recherches pour les besoins du Musée qui est en rénovation. Il exécutait aussi d'autres taches secondaires (téléphones, photocopies). Ses collègues au même statut que lui ont travaillé (2 personnes) en tant que nettoyeurs, un électricien, gardiens, et a la numérisation des archives du Musée.

Giannis a déposé son dossier a son employeur directe, avec lequel il a eu de très mauvaises relations, parce que d' après ses dires «il avait du mal à le repérer localement, parce que ils ne répondaient pas au téléphones. Et J' étais obligé d'aller au travail sans avoir signé du contrat». Finalement avec un retardement il a signé son contrat selon lequel il serait payé «selon ses journées travaillées», sans horaires de travail fixes, avec la possibilité de retard indéterminée au remboursement de sa paye, et aussi avec l'engagement de ne pas rendre publique des informations concernant ses conditions de travail et son contrat de travail. Sa paye était de 625 par mois.

Giannis avec d'autres «bénéficiaires» ont réagie a leur employeur direct et ont avancé a de recherches concernant les lois qui régissait leur statut mais au même temps ils ont diffusé dans la presse des informations concernant leur conditions de travail et leurs contrat de travail. Les réactions provoquées, entre autres l'interpellation au Parlement par de députés de deux parties d'opposition de gauche, ont eu comme conséquence la prise de décision selon laquelle les bénéficiaires seront payées et assurés selon la réglementation de la sécurité sociale des salaires. Ainsi par la suite son employer directe lui a fait signé une prolongation de contrat selon lequel il aurait due travailler 5 jours par semaine 8 heures par jour avec 25 jours par mois d'assurance sociale. Bien qu'il a terminé son travail au Musée, depuis le mois de Décembre (2013), il a été payé, 4 mois plus tard (April 2014), le 40% seulement de sa paye ainsi que ses collègues et essayent a ce moment a travers de démarches administratives mais aussi a travers de mobilisations collectives de se faire payer le reste (60%) de leur rémunération.

#### 3.2 IRICA: Les services TIC aux Caisses de la Sécurité Sociale.

IRICA est une société anonyme a utilité publique dont le statut est prive. IRICA offre des services TIC aux caisses de la sécurité sociale. Les dernières années IRICA a diminué son personnel en ne remplaçant pas les partant a la retraite. Son personnel permanent actuel est passé à 250 de 280 employés à 2012 et de 406 en 2009. IRICA était une société a utilités publique mais elle se restructurait les 2 dernières années et elle se incorporait avec une entreprise prive-publique. Sa

restructuration a menacée les statuts de ses employés qui étaient mobilisés pour l'empêcher sans succès. IRICA a recruté 51 personnes ces derniers mois mais prochainement vont être embauchés une dizaine de pentaminites (travailleurs pendant 5 mois) encore, des ingénieurs en informatique avec des études universitaires mais aussi avec des études plus courtes.

Elena a 27 ans et elle a fait ses études universitaires ainsi que son master en informatique. Avant d'être placée à IRICA, elle a travaillé avec de contrats semestriels au service de clients PTT, et en tant que journaliste, au travail noir, pour une entreprise qui «plaçait» du personnel pour l'organisation des diverses manifestations.

Elena a été placée à la division Développement de Programmes en Informatique. Selon Elena les contractuels dans son département ont été tout de suite dans le cœur du travail avec des responsabilités lourdes et démesurées par rapport à leur statut. Cette situation a conduit à un conflit avec le chef du département qui exigeait des heures supplémentaires, refusées par les contractuels.

Elena n'a pas signé de contrat avec son employeur. Elle travaillait 37,5 heures par semaine et elle touchait 490 euro brut.

Elena a pris des initiatives pour mobiliser ses collègues du même statut qu'elle, avec le recours aussi du syndicat d'entreprise qui était dans le passé récent actif pour protéger les employés d'IRICA de la restructuration. Assemblées générales, protestations écrites, grève blanc, pétition, occupation symbolique pendant 10 minutes du bureau du PDG qui refusait les voir. Leurs griefs étaient : étant donné qu'ils représentent l' 1/5 du personnel de IRICA et ils travaillent autant que le personnel régulier ils ont droit à égalité des conditions de travail (congé de maladie, de vacances), réglementation pour les conditions de travail de «pentamina» (travailleurs de 5 mois) retrait de la mesure disciplinaire, que les contractuels ont été amenés à signer, selon laquelle au cas d'absence du travail même d'une heure, est retiré la paye journalière (19,6) de l'absent. Finalement le PDG a accepté les voir quelques jours avant la fin de leur contrat pour leur dire qu'il n'était pas au courant de leur sort inégale au sein de l'entreprise, mais que lui il ne pouvait pas changer leur statut. La réponse de la part du Service Condition de Travail du Ministère de Travail était qu'il s'agit d'une catégorie spécifique du personnel qui est hors de la législation du travail.

### 3.3 La garderie publique à Glyfada

Les garderies publiques sont gérées par les administrations locales (Municipalités) et fonctionnent avec du personnel contractuel même avant la mise en place des politiques de «déévaluation intérieure»<sup>31</sup>. Au cours de dernières années les garderies publiques ont perdu leur personnel contractuel et couvrent leurs besoins au fur et à mesure et avec un nouvellement constat de leur personnel. La garderie de Glyfada emploie 4 fonctionnaires (dont une éducatrice, une cuisinière, une avec des fonctions générales, et un agent d'encadrement (travailleuse sociale de formation) et 10 éducatrices qui sont toutes embauchées à travers les «pentamina».

Maria a 32 ans, elle a fait des études courtes (bac+2) d'éducatrice des enfants d'âge préscolaire et elle est accréditée de travailler dans les garderies. Elle a travaillé pendant 4 ans avec de contrats de six mois renouvelés tous les ans dans une garderie privée, elle est restée au chômage et elle a déposé son dossier pour avoir une place dans les garderies des plusieurs municipalités qui demandaient du personnel à travers les «pentamina».

La garderie a pu satisfaire les besoins de familles de la ville de Glyfada à travers les éducatrices de Koinofelous ergasias, et selon Maria

*«les parents des enfants sont très contents, parce que la garderie avait arrêté de répondre aux besoins naissants en limitant le nombre d'inscriptions et aussi parce*

*que ces éducatrices allaient travaillaient tout l'année scolaire, contrairement a des éducatrices employées auparavant qui étaient embauchées pendant 2 mois.»*

Comme dit Maria

*« Ils nous attendaient avec les bras ouverts, parce que il n'avait pas de personnel et ils nous demandaient –les parents- si on allait vraiment rester les 5 mois entiers-les petits enfants ont besoin du temps pour s' adapter aux nouvelles éducatrices, au moment ou elles allaient partir»*

Maria non plus n'a pas eu de contrat de travail (de Janvier jusque au Mai 2014) et son salaire était de 490 brut 8 heures par jour strictement, sans aucun autre droit. Elle n'avait pas de droit de grève individuel. Elle a participé à une grève générale de la fonction publique mais pas à celle qui a été proclamée par les contractuels. Elle se dit très contente de son expérience dans la garderie publique par rapport a son expérience dans une garderie prive. *« Les contrats de ESPA donnent la possibilité de prolongation, ainsi que le Contrats de travail déterminé qui durent 8 mois, le salaire est meilleur et tu a droit de faire la grève même individuellement».*

### **3.4 Le Secrétariat General de Presse et d'Information**

Dans le Secrétariat General de Presse et d'Information travaillent environs 450 personnes au niveau national et environ 300 au bâtiment centrale du Ministère a Athènes. Le Secrétariat General a perdu un partie de son personnel les dernières années mais 32 personnes y ont été places travailler au cour de la période Mai -Septembre 2014.

Dimitrios a 57 ans et Il a fait des études universitaires d'économie. Il est au chômage depuis 3 ans, après avoir fermé sa petite entreprise textile au cours de la crise (2011). Dimitrios n'a pas signé de contrat avec son employeur et sa paye était de 490 euro par mois pour 8 heures de travail par jour (Mai-Septembre 2014). Le personnel intérimaire a été distribué entre la numérisation des archives de photo et la numérisation des dossiers du personnel employé au Ministère même, travail que Dimitrios considère très confidentiel (dans les dossiers du personnel se trouvent tous le changement de situation des employés, leurs feuilles de maladie, d'évaluation etc) malgré le caractère intérimaire de leur travail.

Dimitrios, a cause du retard pris pour leur rémunération, a consulté le syndicat des fonctionnaires (ADEDY), pour leur demander d'intervenir a leur aide. Or selon Dimitris les réactions du syndicat des fonctionnaires étaient plutôt froides:«Vous n'appartenez pas a nous».

## **Conclusions**

1. Au cours de la période 2009-2015<sup>32</sup> les politiques mises en place dans le pays pour affronter la diminution de la dette publique, sous la surveillance de Troika, ont eu comme conséquence la transformation du modèle de travail dominant jusqu' alors. Ce modèle qui assurait la stabilité de l'emploi à la majorité de la population active a été poussé à un sens inverse: nivellement vers le bas de tout le salariat, baisse forcée de la valeur du travail, précarisation généralisée du travail, précarisation même de l'emploi à la fonction publique
2. Les nouveaux postes de travail qui se créent sont des emplois précaires, contrairement aux emplois qui sont perdus tout au long de la période
3. Les services publics-le bouc émissaire de la crise-sont brutalement amaigris de leur personnel. Et «les travailleurs de 5 mois» permettent à la fonction publique de couvrir bien ou mal ses besoins.



4. «Les bénéficiaires de 5 mois» sont de vrais travailleurs et sont traités en tant que travailleurs: Leur travail vient répondre aux besoins fixes et réguliers des organismes qu'ils les utilisent, ils travaillent avec des horaires strictes et sont soumis aux droits de directions. Et pendant les mois de leur travail sont enregistrés en tant que travailleurs. Pourtant ils n'ont pas les droits institutionnels de travail.
5. Le travail intérimaire dans la fonction publique, dépourvu de droits, avait du mal à passer et à se faire accepter par la société et les «bénéficiaires». Réactions au niveau national et local ont eu comme conséquence la suppression du rapport triangulaire et une certaine humanisation de son encadrement.

## Notes

1. On parle généralement de «relation triangulaire» entre une entreprise utilisatrice, un salarié et une agence lorsqu'un travailleur intérimaire est engagé par une agence pour effectuer des missions au sein de l'entreprise utilisatrice, dans le cadre d'un contrat commercial. Dès lors, le salarié se trouve face à un «double employeur», ce qui accroît la complexité de la relation de travail. Des problèmes similaires peuvent survenir lorsque les travailleurs sont impliqués dans des chaînes de sous-traitance. <http://ec.europa.eu/social/main.jsp?catId=709&langId=fr&intPageId=217>.  
Le «travail intérimaire» (ou «intérim» ou travail temporaire) consiste à mettre à disposition provisoire d'entreprises clientes, des salariés qui, en fonction d'une rémunération convenue, sont embauchés et rémunérés à cet effet par l'entreprise de travail intérimaire (ou entreprise de travail temporaire). Elle se caractérise donc par une relation triangulaire entre l'entreprise de travail temporaire, l'entreprise cliente et le salarié, et implique la conclusion de deux contrats : un contrat de mise à disposition (entre l'entreprise de travail temporaire et l'entreprise cliente) et un contrat de mission (entre l'entreprise de travail temporaire et le salarié). <http://www.insee.fr/fr/methodes/default.asp?page=definitions/interim.htm>
2. Ce travail a été présenté à sa première version au séminaire international "TRAMED": Les problématiques du travail dans l'espace méditerranéen en crise, CNRS-Aix-en-Marseille Université, 20-21 Novembre 2014
3. La dernière vague de ce Programme a eu lieu au cours de l'année 2015, malgré le changement gouvernemental le 25 Janvier 2015. Le nouveau gouvernement avait fortement critiqué ce type d'emploi. Selon les annonces du gouvernement, la suite du Programme va être réalisée, puisque il a été désigné. Mais, au même temps, certaines caractéristiques du programme vont être reformulées pour correspondre au mieux aux besoins de chômeurs. Selon les descriptions données par la Ministre-adjointe, les postes de travail vont être décrits de manière à éviter l'usage de précaires à la place de postes d'utilité permanente, et au même temps sera mise en place une carte de droits et des devoirs pour toute personne embauchée. <http://www.dikaiogitika.gr/eidhseis/ergasiaka/54161/oi-allages-sta-programmata-tou-espas-gia-aner-gous-pou-proothei-i-antonopoylou>.
4. L'appellation de Troïka désigne les 3 acteurs qui surveillaient les mémorandums imposés en Grèce pour mettre en place la «dévaluation intérieure» de l'économie du pays, autrement dit la baisse brutale de son niveau de vie. Or l'appellation de TROIKA était beaucoup plus que les 3 institutions (Bureau Monétaire Internationale, Banque Centrale Européenne, Commission Européenne). Il s'agissait de bureaucrates, experts techniques qui venaient chez nous, pour

- imposer aux ministres, en les montrant du doigt, comment couper les salaires, les retraites etc. C était le symbole de la soumission d'un pays européenne aux dictats des marchés financiers. C est à cause de ce poids symbolique que le nouveau gouvernement a refusé l'existence de TROIKA et a parlé des institutions européennes et de partenaires avec lesquels un pays, tel la Grèce, négocie. A la phase actuelle de négociations, les institutions partenaires de la Grèce sont quatre (4) y compris l' ESM/EFSM, le Mécanisme de Stabilité Européenne.
5. Le changement politique qu'a eu lieu en Grèce le 25 Janvier 2015 n'a pas pour l' instant eu de changements importants dans la législation du travail. Selon le programme politique de Syriza, la principale partie politique qui participe au pouvoir, tous les droits sociaux du travail qui ont été supprimés par le Mémoires I et II vont être rétablis ainsi que la législation protectrice de l'emploi dans le marché du travail. Pourtant ce gouvernement a été obligé de signer un nouveau Mémoire (III) selon lequel les changements concernant «les licenciements, l'action collective et les négociations collectives vont être en accord avec les meilleures pratiques de l'U.E mais leur conditions ne peuvent être modifiées sans l'accord des institutions» voir loi 4336/2015, Journal du Gouvernement 14 Aout 2015, page 1026.
  6. Pour une description de changements opérés à la législation du travail en Grèce voir *L'Economie et l'Emploi Grecque* Rapport 2015, INE/GSEE, aussi EWCO, 2014.
  7. Dans l' ensemble du secteur privé on comptait en 2013 1,371, 000 personnes. Or dans ce chiffre est compris aussi une partie du secteur parapublic au sein du quel il n'y a pas de licenciement. (SEPE, ERGANHS, 2013).
  8. <http://left.gr> , 16 janvier, 2014 et ERGANHS 2014, 2015
  9. Selon les données présentées par le ministre de l'Administration Publique (en 2014) Kyriakos Mitsotakis au cours de son interview de presse où il présentait son programme sur «le dossier des réformes entreprises et projetées au futur»
  10. Notre analyse est basée sur des rapports d'enquêtes concernant l'ensemble des pays membres de l'UE, conduites essentiellement par EUROFOUND. Selon ces mêmes rapports de recherches les données comparatives ne sont pas toujours très fiables.
  11. Les consultants –offices privés du travail (I.G.S.E) en vertu de la loi 2639/1998 la plupart du temps, et après leur adaptation aux nouvelles dispositions, serviront aussi en tant que agences temporaires de travail (Zographou Sofia:3 , Agrapidas, K.2006 :108).
  12. La proposition de directive sur la libéralisation des services en Europe a été votée par le parlement européen le 16.11.2006 après plusieurs années de consultation très conflictuelle à la suite du lancement en décembre 2000 d'une «stratégie pour le marché intérieur de services. La directive, a été définitivement formulée après un premier rejet par le Parlement et les réactions énormes qu'ont eu lieu. Mais en diffère par de nombreux aspects importants de l'initiale, «directive Bolkestein». Il a été mis en œuvre à 2010.
  13. Selon le rapport établi par KEPE le cadre institutionnel établi en Grèce est composé de très récentes lois, qui prennent donc en compte la réalité de l'UE et le marché unique. Ainsi il semble que la mise en place de la directive Bolkestein n' aura pas donc d' impact particulier puisque la pénétration des entreprises étrangères n'était pas entravée. Et à cette fin, le régime réglementaire existant ne devrait modifier sensiblement l'application de la directive. (KEPE 2005:15)
  14. Agrapidas, K.,2006 : 80, 123-135
  15. La loi 2956/2001 définit l' emploi temporaire qui conformément à l'article 20 (de la loi 2956/2001) «est un travail fourni à un autre employeur (employeur indirect) pour une période limitée, par un employé, qui est associé avec son employeur (employeur direct) en vertu d'une

relation de contrat ou d'emploi fixe ou indéterminée et permis seulement dans les termes et conditions de la loi n ° 2956/2001». L'agence d'emploi temporaire peut être une société anonyme avec un capital de plus de 60.000.000 drachmes, tout en établissant le fonctionnement de l'autorisation spéciale exigée par le ministre du Travail et de la Sécurité sociale, puis l'avis du Comité d'audit de l'emploi temporaire (article 21 § 1.2). La loi 2956/2001 impose certains cas l'interdiction de l'emploi temporaire en définissant de situations où l'emploi temporaire n'est pas autorisé. Ainsi, selon l'article 24, les agences ne sont pas autorisées à utiliser des travailleurs temporaires contractuels en remplaçant des travailleurs qui exercent le droit de grève et lorsque l'employeur indirect a avancé à de licenciement l'année précédente pour les mêmes postes de travail , Agrapidas 2006: 144

16. Loi 3846/2010, article 3, 3899/10
17. De centaines de travailleurs ont été licenciés et réembauchés par des agences d'intérim au cours des années 2000. Nous ne disposons pas de données fiables parce que les entreprises embauchent du personnel à travers d'autres entreprises qui ne sont pas enregistrées en tant que entreprise de travail temporaire. Par exemple de travailleurs de chantiers navals d' Elevsina, de stations d' essence de Shell, du Casino de Montparnes, sont réembauchés à travers Manpower Team, par contre une grande société de télécommunication transfère et réembauche son personnel à travers une entreprise filiale, ELPA, l' entreprise semi-publique d'énergie pétrolière aussi, ainsi que l' entreprise ex-nationale de communication qui a créé une entreprise filiale à travers laquelle elle recrute personnel de toute qualification, sont parmi les exemples que nous connaissons à travers nos recherches personnelles. Voir [www.efsyn.gr](http://www.efsyn.gr) visité le 16/12/13 «Greve a OTE», aussi Επινοικίαση Εργαζομένων ή το σύγχρονο δουλεμπόριο, 2011, Kyratzopoulos, I. (2014), Petraki, G. (2013)
18. Par contre le licenciement de fonctionnaires est encore interdit par la Constitution et l'abolition de cette interdiction est un des objectifs de la réforme constitutionnelle annoncée et projetée par le gouvernement dans le futur immédiat.
19. Selon le Ministre de l'Administration Publique le chiffre des fonctionnaires a diminué pendant les 4 derniers ans de 200,000 personnes et la dépense budgétaire correspondant a diminuée aux environs de 8 milliards d'euro (interview donné le 6/04/14 à Zappeion). L'ensemble du personnel régulier (fonctionnaires+ employés avec CDA) étaient de 625,796 personnes, dont 571,123 de fonctionnaires, et 54,646 employés avec de CDA. A ce chiffre il faut ajouter 35,782 employés avec CDD et 3,957 avec de contrats de mission, autrement dit un ensemble de 667,733 personnes (10/2012).
20. Selon le programme du gouvernement de SYRIZA tous les travailleurs qui ont été licenciés à cause de la politique consécutive de mémorandums vont regagner leur travail dans l'immédiat. En effet au cours de l'année 2015 7000 personnes, licenciées ou mises à disposition ont regagné leur travail.
21. Selon les données publiées par mois par le Ministère en ce qui concerne les départs/embauches/ du personnel régulier (fonctionnaires et CDA): le Décembre 2012: 4,779 personnes sont partis et 368 sont embauches, en Novembre 2012: 2,262 départs, avec 216 embauches, Octobre 2012: 2,372 départs 596 embauches. En 2011, le mois de Décembre 4,803 départs et 521 embauches, le mois de Novembre 5,114 départs et 325 embauches, et le mois d' Octobre 5,939 départs et 1645 embauches (Ministère de la Réforme Administrative et Gouvernance Electronique consulté le 21 mai 2014)  
Entre Octobre 2012 et Octobre 2013 le chiffre du personnel régulier a diminué de 35,928 employés du personnel régulier (fonctionnaires et employés avec un contrat de durée indéter-

- minée (CDI).
22. La loi la plus récente qui détermine les conditions d'exercice de la sous-traitance dans le secteur public est celui de 3863/2010, article 68 «Contrats de sous-traitance pour les prestataires de services»
  23. Selon certaines estimations cette disposition législative visait aux grands travaux publics (4 autoroutes cofinancés par ESPA) qui selon les déclarations du ministre des transports, de l'époque, allaient créer 25.000 postes de travail. Ces grands travaux-selon les discours politique du «succès story» de la «dévaluation intérieure» sont connectés avec le redémarrage de l'économie grecque, par la création de 25,000 emplois.
  24. Loi 3845/2010, 6 Mai 2010, article 2 @5 Mesures de mise en œuvre du mécanisme de soutien de l'économie grecque par les États membres de la zone euro et le Fonds monétaire international. Cette loi adopte des règlements pour mettre en œuvre le protocole du mémorandum qui comprennent, entre autres, des mesures dégradant sérieusement le contenu des relations de travail dans le secteur public et privé et dérèglemente les droit individuel et collectif du travail. (INE/GSEE, 2013, Relations de Travail en Europe et en Grèce: Athènes:187)
  25. Spyros Karalis, Journal quotidien Eleftherotypia 26/04/2014
  26. Avec le changement du gouvernement (25 Janvier 2015) les licenciements sont arrêtés et tous les licenciés ont été réembauchés. Le nouveau gouvernement selon certaines publications journalistiques envisage de remplacer progressivement le travail sous-traitant par de poste de travail permanents au moins au nettoyage.
  27. Le titre le l'action financée par ESPA (Cadre National de Référence Stratégique) est la «création de postes d'emploi au niveau locale a travers les Programmes a caractère communautaire (koinofelous ergasias) » Programme Opérationnelle de Développement de Ressources Humaines (2007-2013) gérée par le Ministère de l'Emploi et de Protection Sociale
  28. Notre étude a commencé Avril- Juin 2014, puis une deuxième élaboration a été faite en Septembre -Novembre 2014. Puis nous avons de nouveau pris en compte de nouveaux éléments qui proviennent du changement politique en Grèce (Décembre 2015).
  29. Leur placement était supervisé par le Conseil Suprême pour la Sélection du Personnel.
  30. Il a été supprimé quelques mois après-le 02/2012
  31. Ce qui équivaut a une chute brutale du niveau de vie de la grande majorité de la population.
  32. Le nouveau gouvernement (de SYRIZA) a refusé de continuer appliquer de politique de diminution du cout du travail et de sa protection. Pourtant les changements vers une amélioration de rapports au travail ne peuvent qu'être très lents étant donnée la destruction du tissu productif du pays, le volume énorme du chômage mais aussi les orientations actuelles de politiques européennes.

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Ανδρέας Φερώνας

## **Ο ΕΞΕΥΡΩΠΑΪΣΜΟΣ ΤΗΣ ΚΟΙΝΩΝΙΚΗΣ ΠΟΛΙΤΙΚΗΣ**

*Θεωρητικό πλαίσιο,  
μεθοδολογικά προβλήματα  
και η ελληνική εμπειρία*



Ανδρέας Φερώνας

## **Ο Εξευρωπαϊσμός της Κοινωνικής Πολιτικής**

*Θεωρητικό πλαίσιο,  
μεθοδολογικά προβλήματα  
και η ελληνική εμπειρία*

Το βιβλίο αυτό καλύπτει ένα κενό στην ελληνική βιβλιογραφία για τον εξευρωπαϊσμό. Παρουσιάζει και αναλύει τις σχετικές θεωρίες, ενώ ανιχνεύει και τα όρια της επίδρασης του εξευρωπαϊσμού, καθώς και των «ήπιων μεθόδων» που αυτός είχε υιοθετήσει πανηγυρικά στη δεκαετία του 2000, πάνω στις μεταβολές της κοινωνικής πολιτικής στην Ελλάδα»

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**Magara, H. and Sacchi S. (Eds)**

***The Politics of Structural Reforms. Social and Industrial Policy Change in Italy and Japan,***

*UK: Edward Elgar, 2013*

**I**taly and Japan are two countries that achieved a miraculous economic growth in the postwar period. Italy expanded its exports greatly by joining the EU and Japan invented the so called convoy system in which the bureaucracy, banks and the manufacturing sector cooperated with each other in achieving international competitiveness. However, both countries, at the beginning of the 1990s, fell into a political and economic stalemate that lasts to the current day. Under the impact of a new globalized financial capitalism, Italy's economy entered into a long slump characterized by low growth, while the collapse of Japan's bubble economy was the prelude to deeper chronic cycles of crisis. In order to overcome the systemic crisis and reshape their economies both countries have undergone, since the early 1990s, a series of structural reforms and momentous changes in their political systems.

Against this background, *The Politics of Structural Reforms* "reveals what Italy and Japan gained and lost through this series of - mostly neoliberal - industrial and social structural reforms, and why these changes have been unsuccessful in cushioning the recent economic crisis" (p. xii). The main questions this edited volume seeks to address are: "What impact did the political changes of the 1990s have on the development of structural reforms in both countries? What consequences, then, did these structural reforms have for current Italian and Japanese politics? Why were Italian and Japanese political leaders unable to avoid the political deadlock and policy stalemate when their economies were hit by the crises of 2008 and 2010-11?" (p.3). To answer these questions the book examines the nature and dynamics of social and industrial reforms in both countries, drawing on a variety of major analytical frameworks, such as the partisan theory, the two party rivalry hypothesis, veto players/points, varieties of capitalism and social alliance theory. One of the main arguments raised throughout the book is that the politics of structural reforms in Italy and Japan during these decades was contradictory in the sense that the political leaders wanted to introduce neoliberal reform policies, but failed to implement effective social and macroeconomic policies by which they would have been able to compensate for the harshness of neoliberal reforms.

The book is structured, besides the introduction, in 8 chapters. Chapters two and three examine changes in corporate governance in the two countries. Chapter 2 analyses the fundamental shifts in Japanese corporate management over the last two decades due to pressures of an increasingly globalized economy. Egalitarianism diminished, interpersonal competition increased and greater numbers of temporary and contract workers were substituted for standard lifetime employees in manufacturing. These changes were driven by the definitive weakening of two important supports of the traditional corporation, namely cross-shareholding and unions, reflected the dominance of the "rational economic animal" theory and resulted in heightened worsening of income inequalities and poverty growth in Japan. Chapter 3 focuses on the distinctive features of corporate ownership in Italy. It suggests that recent attempts to introduce modern rules of corporate governance have only limited effects due to



a variety of imbalances in the Italian economy, including the unequal role of firms in different areas, the public sector's huge deficit in productivity and efficiency, the polarized industrial structure dominated by a small number of large corporations and the persistent influence of politics on the economy. Despite a series of privatizations between 1993 and 2001, the market of corporate control is still insufficiently transparent and the introduction of public companies remains modest. These results may reflect the weakness of firm executives and their dependence on unstable parliamentary majorities. It concludes that traditional practices have not changed drastically, despite considerable efforts made in the past decade to introduce corporate governance rules in line with the market driven model.

The next two chapters focus attention on politics. Chapter 4 examines political change in Japan from an international perspective. It argues that structural reforms that have dominated Japan politics in the last two decades were led by political, bureaucratic and business elites who shared the beliefs that the 1955 system could no longer provide an appropriate conceptual framework under the globalized economy and needed to be replaced by a market-based system with less government intervention. It focuses on a "coordination failure", that is the government's inability and the conservative leadership's unwillingness to strengthen social protection to compensate for neoliberal reforms. Such a coordination package requires political trust and policy consistency that are in short in contemporary Japan. As a result, income inequality widened and the poverty rate increased. Chapter 5 analyses the transitions of the Italian party system from the First to the Second Republic. It considers electoral reform itself as the "structural reform" of Italian politics. By focusing on the 2008 election, it investigates the impact of electoral reforms and political changes on traditional structural cleavages, ideological divisions in the context of increasing EU constraints and the longstanding mass disaffection toward politics. It finds that the upheaval of the early 1990s did not entirely alter political territorial traditions transmitted through family socialization. While the pro-/anti-communist issue still exists in Italy, the post 1994 party system is clearly different from the old system, as there is a move toward bipolarism and also, since the 2008 election, toward a two-party system.

The following two chapters examine labour market reforms in the two countries. Chapter 6 offers a party-centered explanation of labour market reforms in Japan. Focusing on the strategies of the dominant LDP party and its social class coalition, it traces the developments that led to the dismissal and homelessness of a large number of temporary workers in 2008. Considering party politics as the key mechanism that links changes in the structure of financial markets under globalization with changes in the labour market, it explains how changes in the preferences of Japanese business had repercussions for party politics such that the policy orientation of the LDP took an increasingly neoliberal turn. Chapter 7 analyses the differential impact of the highly flexible labour legislation in Italy, boasting through a series of labour market reforms, such as the *legge Treu* of 1997 and the *legge Biaggi* of 2003. These reforms increased the labour flexibility of marginal workers, but not the entire labour force, declined the union's power and raised income inequality. It concludes that in the transition from jobless growth in the early 1990s to "growthless job creation", increased income variability translated into a greater perception of insecurity.

Chapter 8 focuses on examining how and to what extent the Japanese familial welfare regime has been transformed since the 1980s. Welfare reforms in the 1980s intended to restrain increases in social security expenditures and attain fiscal sustainability, following the idea of the Japanese-style welfare society, which expects expanded roles of private welfare, including company

and family welfare, to complement retrenched public welfare. They accordingly reinforced both commodification and familialism. Entering in the 1990s, however, Japan promoted de-familialization through the expansion of social services and gender equal policies. However, this process is far from social democratic de-familialization since women are now mobilized as cheap labour, thus reinforcing the dualist structure of the Japanese market. Thus, Japan has attained the effect of liberal de-familialization.

Finally, chapter 9 analyses why Italy's recent responses to the continuing financial and employment crises failed to alleviate the social and economic problems sufficiently. It argues that recent labour market reforms, allowing micro-level collective bargaining to deregulate statutory employment protection and making dismissals easier, together with a harsh pension reform, introduced in a top-down fashion by the government in an attempt to attain credibility in the international arena, simply to signal international investors. On the other hand active labour market policies were not enacted in the name of financial constraints and a minimum income scheme was not even considered in the reform process. It concludes that the Italian austerity policies were a consequence of international pressures, such as those of the EU, the IMF and the financial markets.

Overall, this edited volume stands out for its advanced and detailed comparative analysis of the Italian and Japanese structural reforms of the 1990s and 200s and for the sophisticated analytical framework adopted. Although the conclusions of the studies may be rather tentative in the sense that the economy and the party politics of the two countries are still experiencing change, it succeeds to show explicitly or implicitly, how types of capitalism, government ideology, political institutions, and the patterns of social alliance, influence governments' efforts to reshape their economies and welfare states. In that respect, it makes a valuable contribution to the literature on structural and welfare reforms and will be an excellent resource for political scientists, labour economists and sociologists, as well as policy practitioners.

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## Anastasia Sofia Alexiadou

### *Social Protection: Historical and Philosophical dimension*

*Thessaloniki: University Studio Press, 2015*

This is an important contribution on the evolution of the institution of social protection, as it has evolved over centuries. Social protection includes important and vital components of modern states which through administration networks serve the people and the society at large. This institution includes Education, Social Security, Social Welfare, Health and Labor.

The author, a historian with a PhD in philosophy, has already contributed with previous books to the evolution of thinking of Greek physicians-philosophers and the historical and philosophical base of Social Security. In this book, which is an ambitious undertaking, refers to the development of forces which shaped the multifaceted structure of Social Protection in different historical periods and different countries from antiquity to present times. It is of great interest that the institution of Social Protection existed in ancient civilizations, Egyptian, Hebrew, Sumerian, Babylonian, Indian and Chinese. Specific emphasis is given to the evolution of Social Protection in Ancient Greece, focused on social reforms and legislation affected by Dracon, Solon, Kleisthenes and during the golden age of Athenian Democracy by Pericles. It is of note that the fundamental principles of Athenian Democracy, namely equality in law, meritocracy and civil rights, were the pillars of social reforms and rights of the citizens regarding social protection and education. Asclepius and Hippocrates contributed also to the social institutions regarding health and education. A brief reference is given to the social institutions on the Roman period followed by extensive historical review in Byzantine period and the influence of Christianity in social welfare and health, especially for the underprivileged sections of society, dealing with poverty and destitution. It is of interest Constantine the Great and Justinian supported reforms against poverty and promoted education and health care.

A brief reference is given to the period of Renaissance regarding the social right in labour, health and education. More emphasis is given to the period of Turkish rule in the Greek population and the evolution of carriers of Social Protection, the guilds, cooperatives and the church, as well as the Greek communities of Diaspora. It is of note that these developments were parallel to the establishment of schools and the educational institution during the 19<sup>th</sup> century, the newly founded Hellenic state, as well as the role of the first Governor Ioannis Kapodistrias, which albeit brief, was fundamental in social reforms.

In the 20<sup>th</sup> century social reforms, regarding health and labor were established, despite economic difficulties, political drawbacks and social unrest. In modern times the social rights and access to health through security funds were strengthened, as well as the social right to labor. The current legal framework of social security is given with ample documentation of the legislature regarding health laws and the evolution of social security regarding health, compensations and pensions. It must be emphasized that the author gives particular emphasis to the limitations and endanger of social rights in health and social security with the current economic crisis and the grave threat against the establishment of laws which provided social security, health and pensions, unemployment and deterioration of the whole structure of social protection. This is very pertinent recording which touches upon a serious matter of the times that Greek population is under the pressures and consequences of a deep and long recession.

The book includes in the final chapters an interesting reference to the philosophical influence of Medicine, education and social security and the contributions of great thinkers and philosophers, namely Adam Smith, Jean Jack Rousseau, Thomas Hobbes, Baruch Spinoza, John Locke, August Kont and Max Weber. This is the period of the themes concerning the development of social contract between the state and citizens, the protection of human rights, i.e. the right to health, education and social security.

Each section of the book contains an extended list of references and excellent documentation for the reader to seek further source of information according to his/her interests. In conclusion, this is a reference book, well written with fluent style, readable and useful for students, scientists, state institutions and administrators, responsible for Social Protection, particularly timely in our times that these institutions are under serious threat. The author has been successful in bringing forward and putting in print, the critical importance of a vital institution in modern states, that of Social Protection, which indeed needs to be protected at all costs.

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## Ανδρέας Φερώνας

### *Ο Εξευρωπαϊσμός της Κοινωνικής Πολιτικής. Θεωρητικό πλαίσιο, μεθοδολογικά προβλήματα και η ελληνική εμπειρία,*

*Αθήνα: Διόνικος, 2013*

**Τ**ο βιβλίο του Ανδρέα Φερώνα *Ο Εξευρωπαϊσμός της Κοινωνικής Πολιτικής* (2013) έρχεται να καλύψει ένα σημαντικό κενό στην ελληνική βιβλιογραφία. Ο συγγραφέας, αν και διαθέτει ένα κοινωνιολογικό υπόβαθρο ανάλυσης, σε αυτή τη μελέτη υιοθετεί μια προσέγγιση με έντονες επιρροές από τα πεδία της Πολιτικής Επιστήμης και των Ευρωπαϊκών Σπουδών. Πρόκειται για μια πολυσύνθετη προσέγγιση, η οποία είναι ασμένως συμβατή με τον διεπιστημονικό χαρακτήρα της Κοινωνικής Πολιτικής.

Σκοπός του βιβλίου είναι η διερεύνηση της εφαρμογής της Ανοικτής Μεθόδου Συντονισμού (ΑΜΣ) στην Ευρωπαϊκή Στρατηγική για την Κοινωνική Ένταξη (ΕΣΚΕ), ως ήπιου εργαλείου διακυβέρνησης στις αντίστοιχες εγχώριες πολιτικές. Κεντρικό ρόλο στη μελέτη διαδραματίζει ευρύτερα η έννοια του Εξευρωπαϊσμού (Europeanization). Έννοια η οποία απασχόλησε έντονα την τελευταία δεκαετία όσους επιστήμονες ασχολούνται με το ζήτημα της ευρωπαϊκής ενοποίησης. Όπως επισημαίνει ο συγγραφέας: «Σε γενικές γραμμές ο όρος χρησιμοποιείται για να υποδηλώσει την επιρροή των ευρωπαϊκών θεσμών και διαδικασιών σε κάποιους τομείς ή και στο σύνολο του εθνικού πολιτικού συστήματος» (σελ. 27).

Η επίδραση του εξευρωπαϊσμού έχει μελετηθεί από ποικίλα πρίσματα (π.χ. η επίδραση του στις κυβερνητικές και γραφειοκρατικές δομές, η επιρροή του στις εγχώριες πολιτικές διαδικασίες ή σε μια σειρά από τομείς της δημόσιας πολιτικής, στους τρόπους λειτουργίας και λήψης αποφάσεων, στην υιοθέτηση και εφαρμογή του κοινοτικού κεκτημένου, κ.α.), κάτι τέτοιο όμως δεν έχει συμβεί εμπειρισιακά στην κοινωνική πολιτική. Όπως επισημαίνει ο συγγραφέας, παρότι ο σχετικός εγχώριος επιστημονικός διάλογος παρουσίασε μια αυξητική τάση την τελευταία δεκαετία (ιδιαίτερα σε ζητήματα του ελληνικού συστήματος κοινωνικής προστασίας συνολικά, είτε σε επιμέρους τομείς όπως το συνταξιοδοτικό ή όπως η απασχόληση και ο κοινωνικός διάλογος ή, ακόμη, στα θέματα της μετανάστευσης και του φύλου), κάτι τέτοιο δεν φαίνεται να συμβαίνει στο πεδίο των πολιτικών κοινωνικής ένταξης. Γεγονός που προσδίδει σε αυτή την συμβολή μια επιπρόσθετη αξία.

Ο κεντρικός προβληματισμός που απασχολεί τον συγγραφέα σχετίζεται με την επίδραση του εξευρωπαϊσμού στις εγχώριες πολιτικές διαδικασίες, τους θεσμούς και τις παρεμβάσεις της κοινωνικής πολιτικής. Κάτι που το εξετάζει μέσα από το παράδειγμα των πολιτικών κοινωνικής ένταξης. Το βιβλίο χωρίζεται σε τρία μέρη τα οποία ακολουθούν μια κλιμακωτή λογική εμβάθυνσης. Στο πρώτο μέρος περιγράφεται το θεωρητικό και μεθοδολογικό πλαίσιο της μελέτης. Το δεύτερο μέρος καταπιάνεται με την 'από τα κάτω' (bottom up) πτυχή του εξευρωπαϊσμού και το τρίτο ασχολείται με την 'εκ των άνω' (top down) διάσταση του αντίστοιχα.

Αναλυτικότερα, το πρώτο μέρος αποτελεί το θεωρητικό επιστέγασμα εντός του οποίου θα αναπτυχθούν οι ειδικότερες εμπειρικές εφαρμογές στα δύο επόμενα μέρη που ακολουθούν. Απαρτίζεται από δύο κεφάλαια, τα οποία εμπεριέχουν την παρουσίαση του θεωρητικού πλαισίου του Εξευρωπαϊσμού. Στο πρώτο κεφάλαιο επιχειρείται η εννοιολογική αποσαφήνιση του, διακρίνοντας τον από παρεμφερείς όρους και ορισμούς. Παράλληλα, γίνεται η θεμελιώδης διάκριση των εκ των άνω και από τα κάτω πολιτικών διαδικασιών, οι οποίες θα κυριαρχήσουν στα δύο επόμενα μέρη

του βιβλίου. Σκιαγραφούνται ακόμη οι μορφές επίδρασης του εξευρωπαϊσμού και οι κυριότεροι μηχανισμοί του. Στο δεύτερο κεφάλαιο διεξάγεται επισκόπηση των βασικότερων ερμηνευτικών προσεγγίσεων του εξευρωπαϊσμού.

Το δεύτερο μέρος του βιβλίου συνθέτουν τρία κεφάλαια, τα οποία εμβαθύνουν στη διάσταση των από τα κάτω διαδικασιών του Εξευρωπαϊσμού. Ο συγγραφέας εξετάζει το πλαίσιο της διαμόρφωσης των Ευρωπαϊκών θεσμών με μελέτη περίπτωσης την ανάδυση και εφαρμογή της ΑΜΣ στο πεδίο της κοινωνικής ένταξης. Με κριτήριο την χρονολογική ταξινόμηση το τρίτο κεφάλαιο αναφέρεται στην παρουσίαση των σχετικών ενεργειών που σημειώθηκαν μέχρι το 2000. Το τέταρτο κεφάλαιο, επεξεργάζεται και αναφέρεται στην υλοποίηση της ΕΣΚΕ στη Στρατηγική της Λισαβόνας (2000-2010). Τέλος, το πέμπτο κεφάλαιο προβληματίζεται γύρω από τους στόχους και το περιεχόμενο των πολιτικών για την κοινωνική ένταξη στο πλαίσιο της τρέχουσας Στρατηγικής «Ευρώπη 2020».

Το τρίτο μέρος αυτής της εργασίας διαθέτει επίσης τρία κεφάλαια τα οποία καταπιάνονται με την εκ των άνω εκδοχή του Εξευρωπαϊσμού, εξετάζοντας την επίδραση της Ευρωπαϊκής Ένωσης στις εθνικές πολιτικές κοινωνικής ένταξης των κρατών μελών. Για τον σκοπό αυτό στο έκτο κεφάλαιο γίνεται αναφορά στα μεθοδολογικά προβλήματα με τα οποία συνυφάνονται τα 'ήπια εργαλεία διακυβέρνησης' στην εφαρμογή των πολιτικών μέσα από το παράδειγμα της κοινωνικής ένταξης. Τα κεφάλαια επτά και οκτώ είναι αφιερωμένα στην ελληνική εμπειρία. Ασχολούνται με την επίδραση της ΑΜΣ στις ελληνικές πολιτικές κοινωνικής ένταξης την περίοδο 2000-2010, καθώς και κατά την περίοδο των Μνημονίων αντίστοιχα.

Αναμφίβολα, το βιβλίο του Ανδρέα Φερώνα ανοίγει ένα νέο κεφάλαιο στην ελληνική βιβλιογραφία του περί εξευρωπαϊσμού διαλόγου. Συνεισφέρει ενημερωτικά και διεισδυτικά στη σφαίρα των προκλήσεων, των επιδράσεων και των ιδιαιτεροτήτων του σε έναν τομέα που δεν έχει μελετηθεί επαρκώς. Αν θα μπορούσε να διατυπωθεί μια κριτική επισήμανση σε αυτή την ενδιαφέρουσα μελέτη, αυτή θα ήταν η εξής: ο γενικός τίτλος που φέρει ενδεχομένως δημιουργεί προσδοκίες, πέρα από την παρουσίαση της κάθετης αλληλεπίδρασης μεταξύ ΕΕ και Κρατών Μελών στο πλαίσιο της διαδικασίας Εξευρωπαϊσμού, και για μια οριζόντια συγκριτική ανάλυση του σε διαφορετικούς τομείς κοινωνικής πολιτικής. Σε αντίθεση με αυτό, αντικείμενο της εργασίας είναι αποκλειστικά οι πολιτικές κοινωνικής ένταξης. Σε κάθε περίπτωση, η προσπάθεια αυτή επιφέρει ένα αξιόλογο αποτέλεσμα και μια ποιοτική προσθήκη στο ελλειμματικό βιβλιογραφικό απόθεμα της Κοινωνικής Πολιτικής στην Ελλάδα.

**Νίκος Κουραχάνης,  
Πάντειο Πανεπιστήμιο**

## **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 αντιστοίχιση 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.

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