# Class and Status

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**Articles**

# The ever shaping of the field of children's paid extracurricular activities in Athens

## Class inequalities, distinction and reproduction

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## Abstract

The paper examines how over the decades, the field of children's extracurricular activities is gradually expanding in Greece (mainly in the urban centers and specifically in Athens), attaining in recent years an increasingly central position, parallel and complementary to formal education. The extent and the way children participate, the parents' conceptualizations and expectations from this involvement vary according to a family's social class as well as to changes in formal education and in the labor market. The article is based on semi-structured and in-depth interviews with thirty-four people, on informal conversations, and on regular attendance at a private center and an athletic club where children participate in extracurricular activities. The analysis draws on Bourdieu's approach, highlighting the centrality of family's class/ position in the social field, related to its economic, social, and cultural capital. The focus is on class reproduction through the "displacement of the structure of distribution". That is to mean, on the maintenance of the established order taking place through change and

movement, intergenerational accumulation of goods, academic titles and qualifications, and access to better working positions.

**Keywords:** *children's extracurricular activities, formal and informal education, labor market, intergenerational accumulation, family's social class/ total capital, class reproduction*

## Introduction

In one of the first scenes in the movie "Learn How to Read and Write, my Child" (Mathe paidi mou grammata, 1981), the protagonist (Anna Manzourani) is travelling through the Peloponnese by train. Two men (one of them is sleeping) and a little girl (whose father is the one sleeping) are sitting next to her. The one who is awake (Giorgos Vrasivanopoulos) starts talking to her, mentioning that, due to his profession, he has been continuously traveling by train since 1950. During these years he has noticed that all the passengers had only one destination, Athens.

> When in 1951 I asked a young man why he was going to Athens, he replied to me, "I finished senior high school, and I am going to study at the Ikaron school" (the military air force pilot school). That time everyone wanted to be an Icarus (a pilot)… In 1962, I asked two young men why they were going to Athens. The first one said that "I'm going to take exams for the university department of Architecture or for that of the department of Engineers". The other one responded, "I'm going to take exams in order to become a foreman". More down-to-earth professions in 1962... In 1968, during the junta, I asked an elderly couple "if I may ask, why are you going to Athens", (and they replied) "well, since our children left to study, we want to be with them". After the Metapolitefsi (Return to Democracy), I asked a young man, who must have been about 15 years old, "why are you going to Athens at such a young age?". He responded, "well, I am going to complete my final years of senior high school there and at the same time to attend private tutoring classes". The latest fad, private tutoring schools. Everyone was going to Athens for private tutoring schools. A few days ago, I came across a twelve-year-old boy, who had just completed primary school. "Why are you going to Athens?", I asked him, "to attend a tutoring school", he answered ... When the passenger who was sleeping woke up, he asked him why he was going to Athens. "Once the child starts the primary school, we said we should start tutoring school..."

After his response, the two actors (Anna Manzourani and Giorgos Vrasivanopoulos) looked at each other knowingly. In the film, the protagonist (Vassilis Diamantopoulos), a strict and conservative high school principal in a poor mountainous village in which the story takes place, is very proud of his eldest son (Kostas Tsakonas) who is returning from the UK after completing his PhD studies. Throughout the film, and as the drama escalates, the son, unable to find a job which is on a par with his exceptional academic qualifications, keeps wondering, in fact, muttering to himself. "Six years of primary school, and six years of secondary school make twelve, another six years at the Technical University make 18, and a further six years abroad make 24, and another six years before I begin school, 30. I'm now 36, and six years are missing. "Where did these six years go?"

Thodoros Maragos (screenwriter and director of the film) seems to be familiar with the sociological debate of the early 1970s, which highlights the Greek families' priority regarding the formal education of their children. A phenomenon defined as the "learning tendency" (morfosiogonos tasi) (Lampiri-Dimaki, 1973) or, in the words of Konstantinos Tsoukalas, the "worship of learning" or "generalized worship of learning" (morfosiolatreia/genikevmeni morfosiolatreia) (1975, 1977). What Tsoukalas illustrates is the great desire, and constant effort of most parents (regardless of social class), since the 19th century, to offer their children (initially boys), the opportunity to acquire educational titles. A desire and effort that for the less privileged classes entailed big economic sacrifices. The author relates this phenomenon to the way production and class relations were formed in Greece in the 19th century. He emphasizes the passage of the small and medium scale farmers into the petty-bourgeois unproductive class of the cities –i.e. merchants, employees of both the public and private sectors. In a first phase, this passage was achieved through their children's successful migration for work –that is not in terms of proletarianization– and gradually through education, which functioned as a "springboard for social mobility" and for "intergenerational upward mobility". Over the decades, these key elements –the "easiness" to migrate, the family's "commitment" to their children's education, the strong tendency to be employed in non-productive jobs in the urban centers–, became "integral parts of the collective consciousness of the Greeks", a type of "collective unconscious" (Tsoukalas, 1977: 401-429, 569-576).

Antonis Georgoulas (1997), examining the post-war period of the rural exodus in Greece (1950-1980), highlights an intergenerational continuum pointing a reproduction of previous positions and power relations, which he defines as "social repositioning/ displacement" (koinoniki metataxi), rather than upward mobility. He underlines that agents' work and new social positions in the urban context (middle class, petite bourgeoisie, working class) are related to their previous social positions (dominant, intermediate, dominated) as well as their educational capital. Thus, after World War II, and especially after 1974, "morfosiolatreia" turns into a "hunt" of academic qualifications which leads to the phenomenon of "over-education" and "inflation" of degrees, based on the desire to claim white collar jobs in the public and private sectors. The number of admissions to higher education (Higher Educational Institutions/AEI and Technological Educational Institutions/TEI) is constantly increasing[1]. Due precisely to the increased number of graduates, since the 1990s, the number of postgraduate programs and students continuing their education at the master's, doctoral, and now postdoctoral level have also been steadily growing. In the first years after the start of the economic crisis in Greece (2009), the number of students admitted to higher education starts to decrease.[2]

The aim of the paper is to highlight how over the decades, children's extra-curricular activities are gradually getting an increasingly central position, parallel and complementary to formal education, thus forming "morfosiolatreia" in new ways. The period in which the number of children attending higher education and acquiring degrees (over-education, degree inflation) is steadily growing –the last two decades of the 20th century and the first decades of the 21st century–, coincide with the period when in Greece (mainly in the urban centers and especially in Athens) the field of extracurricular activities is flourishing. That is to mean, there is a continuous increase and dispersion of children's activity centers (from the center of Athens to the suburbs and from the center of the suburbs to the neighborhoods coupled with a continuous increase in the activities offered; of people working in this field either as employers or as employees; of children enrolled in activities as well as of the number of activities in which they are enrolled. Throughout these years, the participation of children has been expanding both in quantity and in quality. Petit bourgeois and working-class families (families of smaller total capital according to Bourdieu) begin to seek and ensure the

participation of their children in extracurricular activities, a participation that in the past was an almost exclusive privilege of the children of middle- and upper-class families (families richer in total capital). At the same time, the tertiary labor sector (with its internal differentiations and hierarchies) is constantly expanding in Greece, with its most specialized, new, and more prestigious positions, employment depending on both formal and informal qualifications along with social networks.

Therefore, key questions addressed in the article are how the field of extracurricular activities is shaping over time in relation to the changes in formal education as well as in the labor market; why the field of extracurricular activities is constantly expanding and flourishing, attracting more and more children, even in the difficult periods of the economic crisis and of lock downs due to the coronavirus pandemic (March to June 2020, October 2020 to May 2021); to what extent and in what ways the children are involved; how parents' perceptions and expectations vary according to their social origin; which social classes enroll their children in activities that in the past were exclusively identified with the upper classes (e.g. piano, ballet, tennis); how in this new reality of expanded participation, upper class families construct and symbolize their class "distance" and status that seems to be threatened. To approach these issues, I draw on the concept of class in Bourdieu's terms of total capital (economic, cultural, and social) and therefore of family's position in the social field as well as on class reproduction yet taking place through change, intergenerational accumulation of goods, titles and qualifications, and access to better work positions.

The article is based on empirical research carried out during the period 2015-2017 and is part of a research program on the social effects of the economic crisis in Greece at the Research Centre for Greek Society (Academy of Athens) with my own focus being on children's formal and informal education.[3] I conducted semi-structured and in-depth interviews with thirty-four people who live in different suburbs of Athens, belonging to different social classes (working class, petite bourgeoisie, and middle class) or, according to Bourdieu, possessing different total capital and thus a different position in the social field. I also had informal discussions with parents as well as with employees in the field of informal education and activities; a seven-year systematic presence (2015-2022) in a private center of organized activities exclusively for babies and children of early school age,

and from 2022 in a renowned athletic club. In both activity places I have accompanied my daughter from her infancy until today. Raising a child, as well as having worked as a teacher in primary education, played a major role in the decision to study not only formal education but extracurricular activities too. It was through this continuous contact I had with parents in public and private playgrounds, parks, activity centers, children's parties, in kindergartens and primary schools, that I realized how important they considered a child's participation in activities, progressively in as many as possible and from as young an age as possible. To ensure the anonymity of my interlocutors, pseudonyms are used and some of their biographical features have been modified.

Getting back to the movie. We could assume that if it were to be filmed today, the man traveling with his young daughter would inform his fellow travelers that the goal of moving to Athens would be to enable his daughter to attend extracurricular activities.

## Theoretical approaches. Class mobility, reproduction, total capital, and position in the social field

The concept of mobility is historically related to that of meritocracy, a value born and identified with the rise and gradual dominance of the bourgeoisie. According to meritocracy, a person can succeed in moving up socially by his own effort, hard work, and education. Through this ideological principle, the bourgeoisie prevailed over the noble class (which based its dominance on the privileges derived from descent) and distinguished itself from the lower classes (peasants and workers). As the dominant/ruling class in capitalist societies, the bourgeoisie invokes equal opportunities and meritocracy, convincing the lower/ dominated classes that what they have or don't have is exclusively linked to their own worth and effort. Dominated classes' consensus is valuable insofar as it leads them to accept rather unquestionably their social position and destiny.

Pitirim Sorokin writes about "structural mobility", which he associates to broader economic and social changes, and in particular to the expansion of one social category and the corresponding shrinkage of another (Tsoukalas, 1975: 24, 33; 1977:137). It is the case of mass transition from the primary to the secondary sector of the economy (e.g., European countries during

industrialization); from the primary to the tertiary sector of the economy (e.g., Greece since the last decades of the 19th century); from the secondary to the tertiary sector (e.g., western countries since the last decades of the 20th century due to 'deindustrialization').

Louis Althusser (1971) underlines the link between formal education and the labor market in capitalism. He maintains that employees in capitalism are not reproduced as homogeneous but as specialized workers through the acquisition of various specialties that lead to specific work positions and professions (social and technical division of labor). The reproduction of the specialized labor force no longer takes place within production (through apprenticeship) but in the educational system. Thus, education has a key role in the reproduction of the division of labor and in the acquisition of specific qualifications and skills. At the same time, he notes that the rules of conduct taught at school are related to the type of work that students are expected to undertake in the future due to their social origin. In this sense, Althusser identifies the educational system in capitalism as a dominant state mechanism of both ideological and class reproduction (Carnoy, 1990: 130-135).

Nikos Poulantzas argues that since in capitalism people are not "tied" to a social class –the case of "casts" in feudalism–, there is always the possibility "to move". However, he stresses that through social mobility, even on the "absurd" assumption that it would be "absolute" –that is, if all persons of the ruling class were to move to the working class and vice versa–, the nature of the capitalist system would not change. In the sense that its basic opposition, that between the exploiters and the exploited, capital and labor, would remain. Ideological state mechanisms, such as the educational system, create neither the division of society into classes nor the division of intellectual and manual labor. They rather contribute to their legitimization and reproduction as well as to the elaboration, inscription and implementation of the dominant ideology. He maintains that the decisive role is played by the labor market, perceived as a manifestation of the reproduction of productive relations. In this way, he does not attribute the passage of peasants into working-class jobs to the educational system, but to the abolition of rural jobs and to the reproduction of the working class. Thus, it is production and the labor market that determine the role of education, and not the other way round. However, according to Poulantzas, class reproduction has two facets existing only in their unity; the reproduction of the posi-

tions, which characterize the structural determination of the classes, and the reproduction/distribution of the agents in these positions. The capitalist school, overall placed on the side of intellectual labor, operates as a "distributor" of agents in the positions, mainly for the two basic social classes. As he explains, "the children of the bourgeois remain en masse bourgeois, and the children of the proletarians remain en masse proletarian", they are "distributed by remaining in situ, as if they were tied to these positions". Thus, it is for the children of the petite bourgeoisie –always living in fear of proletarianization as an intermediate class–, especially of the new one (part of the petite bourgeoisie created by the development of the capitalist mode of production) that education plays an important role, enabling their movement/ "displacement" either to the bourgeoisie or to better positions in the hierarchy of intellectual labor. This explains petite bourgeoisie's belief in the neutrality of education and in the possibility it provides for "upward mobility". Poulantzas argues that the "democratization" of education (in the sense of mass access to it) leads to the downgrading of academic titles and to an inconsistency between schooling and the intellectual labor market. This non-adaptation of diplomas to the current labor market, leads to unemployment or to "hidden" unemployment, that is to various types of underemployment, of temporary or rotational work (Poulantzas, 2008:31-44, 321-335, 350-353, 385-406).

Since the 1960s, sociology of education in Europe focuses on how children's educational path is linked to their family's class position and hence to the issue of class reproduction and/or class mobility. Marxist and neo-Marxist theorists question the concept of upward mobility, perceiving it as statistically insignificant and/or as placing people in close/ similar positions in the social structure (Willis, 1977). Pierre Bourdieu argues that what is seen as upward mobility is actually "a displacement of the structure of the distribution", inviting us to think relationally. He maintains that the actions of each class to gain further privileges are compensated by the reactions of other classes directed toward the same objective designated by the upper class. Each time the underprivileged groups attempt to acquire assets previously possessed by groups "immediately above them in the social hierarchy or immediately ahead of them in the race", their acts are counterbalanced by the efforts of the better-placed groups to maintain "the scarcity and distinctiveness of their assets" –namely educational titles and jobs. All the

groups involved in the "race" must "run" to keep their position, their rank, to "keep their distance from those immediately behind them", and gain access to what the more privileged classes, "the group just ahead" of them, already have. Since "the competing groups are separated by differences which are essentially located in the order of time", the less privileged classes have access to goods, degrees, titles, jobs, yet "later on", when in fact all these no longer have the same value. This was the case during the post-war period when the dominated classes gained mass access to consumer goods, to "cardinal properties" –defined as the "embourgeoisement of the working class"–, to secondary and gradually to higher education, known as "the democratization" of schooling. Thus, Bourdieu maintains that we must acknowledge the "dialectic of downclassing and upclassing, which entails that all the groups concerned run in the same direction"; that there are social contradictions and struggles which perpetuate the established order; that permanence can be ensured by change and structure perpetuated by movement. In other words, "the maintenance of order" (the whole set of gaps, differences, ranks…) can be achieved through an unceasing change in substantial properties. The struggle of competition –where each agent acts in isolation– is a particular form of class struggle which the dominated classes allow to be imposed on them. Through "the mere fact of taking part", the dominated implicitly accept the legitimacy of the stakes and goals proposed and pursued by the dominants. It is also a struggle "integrative, by virtue of the initial handicap", and "reproductive, since the unprivileged who enter this chase, are beaten before they start, as the constancy of the gaps testifies" (Bourdieu, 1986a: 157-165).

As far as children's educational path (success or failure), Bourdieu focuses on the decisive role of family's total capital (economic, social, and cultural) which place agents in the social field. According to him the social field is founded on difference and distance since it is a set of coexisting and relationally determined positions (Bourdieu and Passeron, 1993; Bourdieu, 1986a, 2000, 2006). The economic capital includes one's movable and immovable property. The social capital is related to all the resources available to someone due to his/her participation in a formal or informal network of relationships. Its power varies according to the size of the network as well as to the total capital available to each of its members (Bourdieu, 1986b:249; Bourdieu and Wacquant, 1992: 119).

The cultural capital, which Bourdieu considers as the most important one as far as educational path is concerned, has three forms: the "embodied", the "objectified" and the "institutionalized". Starting from the end, the "institutionalized" form is summed up in the possession of educational titles/degrees which give institutional recognition to the cultural capital possessed by the agents. The "institutionalized" form on the one hand enables the comparison between degree holders and on the other hand determines the economic value of titles in the labor market, allowing this way the convertibility of cultural capital into economic one. The gains (material and symbolic) guaranteed by educational qualifications are related to their rarity since the overproduction, "inflation" of diplomas, diminish their value (Bourdieu, 2000: 45). In this case, members of the more privileged classes, those better positioned in the social field due to their total capital, develop strategies and adopt practices that allow them to protect their titles from the "supernumeraries". Defending, thus, their privileged positions threatened by the underprivileged and maintaining their distance in the social field (Bourdieu, 1986a: 160-163). The "objectified" form is related to the possession of goods such as houses, furniture, paintings, books, musical instruments, private means of transport. Their very existence exerts a fundamental educational effect since they are part of the environment in which children are born and grow up (Bourdieu, 1986b: 255-6). Even if their possession presupposes economic capital, the type of the goods as well as their use depend on the "embodied" form of cultural capital. The "embodied" form is about permanent dispositions which cannot be transferred or acquired instantaneously, assuming a work of inscription and of time personally invested by the agent (Bourdieu, 1986b: 241). In this process, time establishes a link between economic and cultural capital in two ways. Firstly, the freer time –understood as time freed from economic necessity– a family can provide to its members, the more cultural capital can be accumulated by them. Secondly, in privileged families this process starts very early (early transmission and accumulation), and it extends over time. It is crucial to examine how cultural capital is inscribed in the early years of life, since it "remains marked by the primary conditions of acquisition", by "early family education" (Bourdieu, 1979). That is, when children begin to "learn", without even realizing it, the values, preferences, practices of their family, attaining thus the "habitus" of their class.

"Habitus" is socially and culturally constituted, "a subjective, non-individual, system of internalized structures, shared forms of perception, understanding and action" (Bourdieu, 2006: 100). It is the way in which one exists as corporal subject, conceptualizes the world and places him/herself within it shaping his/her strategies and practices. The habitus is gradually shaped, from the moment of one's birth, through the daily, incessant experience of a specific class and cultural reality, constituting an imperceptible process of internalization through osmosis (Bourdieu and Passeron, 1993: 63). It is the early, uninterrupted, imperceptible, and effortless nature of the process that ensures "naturalness" and makes this process the most crucial educational investment. Both in the sense of his/her educational course and in the sense of his/her future work position and thus placement in the social field. The school, as it is organized and structured, favors the already favored, the "heirs", legitimizing and reproducing thus the already existing class inequalities. At the same time, habitus produces differentiations, being the generative principle of distinct and distinctive practices. "The worker's food and above all the way he eats it, the sports he practices and the way he practices them, his political views and the way he expresses them differ systematically from the products consumed by the factory owner. These are also different systems and principles of classification, different principles of consideration and discrimination, different tastes" (Bourdieu, 2000: 21-22). In this context, people "choose" different sports according to their social class. However, even when they "choose" the same sport, they neither get involved nor conceptualize them in the same way, nor do they have the same expectations from their participation (Bourdieu, 1986b: 208-225).

In the process of reproducing their class position, their position in the social field, agents belonging to the upper classes adopt strategies and practices of distinction, maintaining thus their distance from the lower classes. When the distinctive structure of a good or practice shifts, their scarcity and value as symbols of distinction diminish, thereby threatening the prominence of the "older possessors" (Bourdieu, 1986a: 161-168). In this context, if a practice is adopted by the lower classes, the "old owners" may abandon it. At the end of the 19th century, the aristocrats in France abandoned boxing and turned to other sports, when bourgeois, and later on petty bourgeois, and workers began to engage in it (Bourdieu, 2000: 17). To maintain their distance, the dominant classes may also change the ways in which they engage in it. Once

the lower classes begin to learn and play tennis, the upper classes maintain their distance and defend their lead in the social field through "the proper use, the right way of practicing" (Bourdieu, 1988: 156-158). In other words, what rackets they use, what clothes and shoes they wear, who are their coaches, with whom and on which courts they play (in public or in private courts, in private clubs), how often and for how long (how early in age they start and until what age do they continue to play).

Bourdieu upon studying the relationship between social origin, academic qualifications and jobs over time, states that the overproduction/inflation of diplomas, due to the "schooling boom" and to the related intensified competition, is associated to their consequent devaluation. The devaluation of a diploma is linked to its holders being more than the number of suitable work positions in a certain period. Thus, the holders of devalued qualifications must seek strategies "to maintain their inherited positions or to obtain from their qualifications the real equivalent of what they guaranteed in an earlier state of the relationship between diplomas and jobs" (Bourdieu, 1986a: 133, 142). According to Bourdieu this is a structural reality that affects all members of a school generation –a "collective disillusionment" resulting from the divergence between aspirations and real probabilities. Thus, the extent to which they will be affected, their strategies and practices are related to the rarity of the titles they hold as well as to their social class. In this context, the creation of many bourgeois and semi-bourgeois jobs, produced either by redefining old positions or by inventing new ones, aim to the prevention of downclassing. For the bourgeoisie's children, the tendency is to move into the most ill-defined and unstructured of the old as well as into the new professions mostly that of cultural and artistic production, of voluntary or political associations. These new positions draw their attractiveness to the fact that they are "vague and indeterminate, uncertainly located in social space, thus leaving ambitions considerable room for manoeuvre". Bourdieu states that this situation is linked to the new educational system in which (unlike the old one) the exclusion of the great mass of the less privileged students takes place later, through more hidden forms as well as through the awarding of "a good number of certificates difficult to compare, subtly ranked in prestige and thus devaluated". This system of "fuzzy classifications and blurred edges" encourages expectations that are themselves blurred and fuzzy and hence the formation of a relationship to the future that is not as

realistic as it used to be, when the proper limits were founding "an acute sense of hierarchy". And while the central characteristic of the old jobs (for which the old educational system prepared) was the rigidity, the new ones are characterized by flexibility. In this context, on the one hand "there is an impalpable, infinitesimal slippage between study and work, work and retirement". On the other hand educational and work issues are not conceived by the agents as social and political but as personal ones. As far as the recruitment is concerned, the primary role of social networks (social capital) as well as of class habitus, rather than formal qualifications, is highlighted (Bourdieu, 1986a: 142-167).

Moreover, Bourdieu links these positions, which impose new uses of the body, "new bodily hexis" and the production of the corresponding needs, expectations, and dissatisfactions, to the changes in the mode of domination. The symbolic integration of the dominated classes is now achieved "by imposing needs rather than inculcating norms, by substituting seduction for repression, public relations for policing, advertising for authority, the velvet glove for the iron fist" (Bourdieu, 1986a: 154). In previous centuries, the transition to industrial capitalism meant the transition to another whole culture (systems of power, property-relations, religious institution), school had an important role in shaping future workers aligned to the new needs of production and overall existence (Thompson, 1967). In our days and in the context of "general positivization of society", the need for productivity growth is met by willing and multi-tasking employees, the achievement-subject (Han, 2015), who through an illusory sense of freedom, fostered both by the current school and by their voluntary participation in various extracurricular activities, are led to self-exploitation.

## Extracurricular activities. Class conceptualizations, practices, and reproduction

The international literature on children's participation in extracurricular activities focuses on the question of class and class reproduction, highlighting which social classes enroll their children in extracurricular activities, to which ones, with what frequency, for what reasons and with what expectations. Researchers' analysis draws on Bourdieu, especially regarding the centrality of cultural capital, habitus, and distinction. What they underline

is on the one hand the consumption practices and the use of free time as class defined and on the other hand education, in this case the informal one (activities), as a mechanism of class reproduction.

The researchers note the time coincidence as far as the increase in the number of young people admitted to higher education and that of the flourishing οφ extracurricular activities is concerned. Since the 1970s in western countries, the number of those who acquire a university degree, and thus could apply typically on equal terms for "good jobs", is constantly increasing. When, particularly, middle-class families realize that higher education is no longer just their privilege, being "under attack by invaders from below", they adopt strategies and practices such as the choice of their children's schools and extracurricular activities. Their aim is to maintain and reproduce their advantageous position in the social field and prevent their children from downward mobility. While the "fear of falling" is a main characteristic of the middle class as an intermediate class (between working and upper class), this fear is growing in times of economic crisis when class reproduction seems uncertain. The concerns as well as the strategies middle-class parents adopt point to an "increasing emphasis on the principles of Bourdieu's distinction" (Vincent and Ball, 2001: 184-5).

Annette Lareau (2002, 2003) underlines that in the USA it is the middle-class families that enroll their children in numerous and various paid extracurricular activities (see also Weininger et al., 2015). They are convinced that in this way they offer them the opportunity to develop their potential talents and abilities; to improve their educational performance; to ensure their future through the mastery of basic life skills. Lareau attributes these conceptions and practices to a central characteristic of middle-class families, that is, "concerted cultivation" by which she describes their emphasis on appropriate parenting, conceived as a constant and dedicated effort. "Concerted cultivation" requires money, effort, and time on the part of the parents, who eventually organize their life around their children's needs and programs. Furthermore, Vincent and Ball (2001, 2007), based on empirical data from research conducted in two areas of London (middle-class and working-class), point out a new tendency concerning middle-class families, identified as "constant infant stimulation". That is, the enrollment of their children in activities from an increasingly younger age, namely before the age of five. Many of these activities are offered by nurseries and kindergartens

either as part of the curriculum or as optional courses with extra financial charge. Moreover, activities are sought by parents in private centers where their children can go in their free time. In this context, the variety of activities as well as the centers that offer them are constantly increasing, while the age of enrollment is continuously diminishing –from the age of five to that of three. Thus, participation in various extracurricular activities, and as early in age as possible, is becoming part of the daily and weekly routine of infants and children, complementing, and enhancing family's cultural capital (Vincent and Ball, 2007: 1061, 1067). It is a process central both to the "make up" of the middle class as well as of a middle-class child and in this way to class distinction and reproduction (Ball and Vincent, 2001: 184-185).

Lareau points out that on the other hand, working-class parents perceive their parental role in terms of "natural growth", believing that love and affection is what children really need. Since parenting is conceived as a natural, impulsive, and unplanned process, they do not pursue their children's enrollment in paid extracurricular activities. Vincent and Ball agree that working-class parents do not often enroll their children in activities, since on the one hand they don't perceive their children as a development project and on the other they can't afford it. Other researchers highlight the lack of time due to long working hours combined with their powerlessness to adjust them to their needs, as well as the lack of activity centers in the working-class areas. However, they point out that when extracurricular activities are offered by schools, then working-class children attend them systematically and without differentiation from middle class children as to which ones they choose. The only difference they observe is related to parents' expectations. What working class parents mainly expect from the enrollment in extracurricular activities is for their children to remain safe and out of trouble –not to get involved in "delinquent" behaviors and practices–, a fear not mentioned by middle-class parents living in "safe" middle-class suburbs (Bennett et al., 2012; Chin and Phillips, 2004).

In Greece historical studies highlight the relationship between social class and activities. Christina Koulouri links the creation and spread of sports clubs to urbanization, modernization, and class distinction. During the last decades of the 19th century, participation of youth in leisure sports was the exclusive privilege of the upper and gradually the middle classes. The class differentiation is related to the sports that they chose as well as

to the non-professional, amateur character of the engagement –the lower classes were involved in some sports professionally for livelihood reasons. Since the lower classes increasingly began to participate in sports, as an amateur now, upper class's distinction was achieved either by engaging in new and particularly expensive activities (car and motor racing, flying…) or by joining expensive private clubs. These clubs turn into an extension of social divisions and places of social reproduction, being part of the complex net which reinforces the cohesion of the upper class, its "values, styles, and networks". The ways of involvement in sports and sports clubs manifest the changes in Greek society over the years and especially in the Interwar period when, with the settlement of the Asia Minor refugees, participation in sports became mass and ceased to be identified with the upper and middle classes (Koulouri, 1997: 377-384).

As far as the gender dimension is concerned, in the 19th century upper- and middle-class teenage girls were the only ones attending secondary education (initially only private). Moreover, upper-class girls were the only ones attending activities, such as piano, French, dance and painting lessons, at home or at the private schools in addition to the curriculum. Their participation in activities (characterized by some intellectuals as "decorative" and "showy" and identified to the ideals, and practices of the European upper classes), confirmed and strengthened family's prestige and class status (see Bakalaki and Elegmitou, 1987; Fournaraki, 1987). In this context, the enrollment of middle-class girls was negatively viewed by the upper class which felt threatened by this "mimicry" and "invasion" (Bakalaki and Elegmitou, 1987: 62). At the same time, the enrollment of working class or rural class girls was unthinkable. These young women were expected to acquire only useful skills, suitable for a future of either low-prestige and low-paid manual labor and/or of wife's life in a "hut" (Bakalaki and Elegmitou, 1987: 28-29).

Since the early decades of the 20th century, and in the decades to follow, in addition to their enrollment in sports activities, in urban areas children could join the Scouts (1910), the Lykeion Ellinidon (1911), and, even in rural communities, the parish Sunday schools. In 1936 the dictator Metaxas established the National Youth Organization which aimed at boys and girls aged 7 to 13 (pioneers) and young men and women aged 14 to 25 (phalangites). Participation was mandatory, and its goal was "to urge young people to utilize their free time constructively, aiming to promote their physical and

mental state, to foster national and religious consciousness, and to create a spirit of cooperation and solidarity". Thus, it constituted an "extra-curriculum organization of education, training and propaganda... which provided various activities" (Balta, 2010: 46). Zaimakis mentions that the emphasis was on the one hand on sports, such as athletics, gymnastics, and swimming, representative of the nation's values and ancient Greek ideals and on the other on football, as the regime aimed to control the petty bourgeoisie and the working class to which football was particularly popular (2010: 405-6). During World War II, the left-wing youth organization (EPON), along with fighting against the occupying forces, organized all around Greece (urban, semi-urban centers, rural communities) cultural and sports activities. Stressing their educational and moral character, the aim was to protect young people from "destructive" habits (Sfakianaki, 2010: 420-1). [4]

The recent research on children's enrollment in paid extracurricular activities in Greece highlights the extremely high participation in English language tutoring schools regardless of class and residence –rural, semi-urban or urban areas (Thoidis, 2000; Liamba, 2013; Fakou, 2015). Participation in sporting activities is also high, with artistic activities following. Class differences identified have quantitative and qualitative characteristics. Middle- and upper-class children (families richer in total capital) on the one hand participate in more activities and on the other hand they are the majority in the artistic ones (Thoidis, 2000; Liamba, 2013; Fakou, 2015). Regarding conceptualizations, Liamba, based on her research in Northern Greece, states that most children interviewed focus on the utilitarian dimension of extracurricular activities aiming for future benefits. According to Fakou (her research was held in a working class Piraeus suburb and in a historic private school in Athens), it is working-class families who focus on activities' utility, both current, avoidance of delinquent behaviors, and future, additional work assets. Middle-class parents perceive extracurricular activities as important and necessary stimuli, as a means of developing children's abilities and aptitudes and as a source of joy and pleasure for children.

Activities are also offered in schools after the end of the compulsory program. Private schools offer their students the opportunity to participate mainly in sports and artistic activities at an extra cost. In the elite private schools, the range of these activities is wide: sports, Arts, clubs, foreign languages, excursions abroad and visits to foreign universities. Aiming, thus,

at the molding of "well-rounded personalities" as well as the formation of an "international capital" which helps their pupils to paving the way for study and work abroad in high status jobs (Valasi, 2016: 155-9). As far as public schools are concerned, the Unified Polytechnic Lyceums (1984-1996), established in the logic of compensatory education, offered extracurricular activities, such as theater, chess, foreign languages, learning musical instruments... In primary education, "creative activities" started to operate in pilot all-day schools in the center of Athens (1994). The purpose of all-day schools was to facilitate working parents (in areas of high unemployment and low incomes) as well as to enable children's creativity and free expression. In this context, the pupils did their homework, had tutoring lessons (for pupils with learning difficulties), and participated in creative activities, mainly sports and arts. Since the economic crisis, the all-day schools (founded in 1997 and gradually spread throughout Greece) were limited to offering the educational part (completion of homework). At the same time the Parents' and Guardians' Associations began to offer a range of activities, at affordable prices –both depending on the class characteristics of the suburb. The activities are scheduled for afternoons or weekends and take place in school halls (Thoidis, 2000: 106-110).

## The empirical research findings

## Four scenes

### *Scene one*

March 2009. As a fourth-grade teacher at a primary school in a working-class area in the center of Athens, I hand out students' progress reports discussing with their parents their overall academic performance. One of the mothers, a nurse, informs me that her daughter, Tina, doesn't have free time, and tries to persuade me not to give students too much homework. She then goes on to explain that after school, Tina does English, German, taekwondo, and hip-hop dance classes. To my observation that her daughter may be tired because of the multiple activities she attends and that her school lessons should be her priority, she replies that today's children need to learn at least two languages in order to get a good job in the future; that Tina really likes dancing; taekwondo allows her to defend herself in case she is attacked in the street. She ends by saying

that since her daughter will soon become a teenager, she would rather have her participate in activities than spend her free time hanging around the streets like many adolescents in the neighborhood use to do.

## *Scene Two*

July 2016, Saturday night in a petit bourgeois suburb in southern Athens, three friends are having drinks while the children play under the supervision of employees/educators in a private playground part of which is set up as a café-bar –one of the many of its kind operating in Athens in the last decade. While chatting, Yiannis, a 40-year-old, with postgraduate studies, white-collar employee in the private sector, father of two daughters aged three and five, tells us "we sacrifice everything for our children" (ola thisia gia ta paidia mas). He explains to us that he and his wife (also a postgraduate degree holder and white-collar employee in the private sector) no longer go out as often as they used to, they don't spend on themselves, and that their own wants and needs are no longer a priority. Every afternoon, after they return from work and their daughters from the private kindergarten (because of their incomes, they were not admitted to a public one), they are constantly preoccupied with their children. They play with them at home, in public and private playgrounds, they accompany them to children's creativity centers as well as to organized activities: kinesthetic classes (in the Municipality) and baby swimming (in a private swimming pool) for the youngest, ballet (in a private center) and pre-school music lessons (in the Municipality) for the older one.

## *Scene three*

May 2023, in an upper middle-class suburb of Athens. An older woman (around 60) and a younger one (around 35 with two toddlers), both with a very neat appearance, are sitting in a café-bar which has a specially designated area for children's play –under the supervision of employees. Discussing the younger one's divorce, a piece of advice the older woman (also divorced) gives, and to which she persistently reiterates during their talk, is the ex-husband's obligation to pay for the children's extracurricular activities. She explains that this cost is not included in the alimony and if the younger one doesn't want her kids to "end up without activities", her lawyers must demand it officially. Otherwise, she assumes, the younger one should be prepared to see her ex-husband refusing to pay for the activities, using a series of arguments. Such as "why should Anna

do ballet or George do fencing", "why should they do this or that", "they don't need all these activities", "why should he or she start it, they did not do these when we were married", "these are too expensive" … And she concludes by saying, "I am just telling you; you must be careful. Your kids are very young, they'll need a lot of activities as they grow up. You'll see".

### *Scene four*

September 2023. Board members of a historic athletic club, inform parents about the high demands of their children's sport and introduce the coaching staff. The main coach, a former athlete with many medals and national distinctions, also works as an advertiser. Through coaching, she supplements her basic income and continues to be involved in a field she has been from early childhood and which she does not want to abandon. The two twenty-year-old assistants, who had also started the sport at the club as toddlers, are current athletes and at the same time they study at the university. Half the afternoons of the week (and some weekends) they work as assistant coaches securing a small salary not by working in cafes or bars, like many of their fellow students, but through a job in which they are considered to have the necessary requirements (yet not formal qualifications). In both ways, they enrich the "capital" required in this field, enhancing, thus, the possibility to work as chief coaches in the future.

## And three intergenerational case studies

### *First case study*

Stathis was born in 1936 in a small, poor mountainous village in Central Greece. He enrolls in the village primary school and in his free time mainly helps his parents in the fields and tends to the flock. He does not continue his studies in secondary education, as he doesn't succeed in passing the entrance exams (which existed until the 1970s). So, he works alongside his family, exclusively now since he is no longer a pupil, until he leaves the village to do his military service. He returns to the village, marries a young woman from a neighboring village in the early 1960s and after a while, as the situation is very difficult financially, they move and settle in a working-class suburb of Athens –as many young people of his generation did in the context of internal migration to urban centers, especially to Athens. Stathis starts working in a factory, and remains there until his retirement, while his wife stays at home raising their two children

born in 1966 and 1969. Both Christos and his younger brother attend English at a private language school in their neighborhood (without receiving a formal foreign language certification), football lessons in the local team, chess lessons offered by the left-wing municipality, which prioritized on children's sport and cultural activities. When the two boys are in junior high school, the family moves to a petit-bourgeois suburb in Athens where they buy an apartment in a newly built block of flats. Upon finishing junior high school, Christos continues his studies at a technical senior high school since what he scored in the exams was not high enough to grant him entry to a general senior high school[5]. After graduation, he completes his military service and then-starts working in a security company. In the mid-1990's a cousin of his, who is a university graduate and works in an accounting firm, helps him find work as an insurance agent –that was the period when insurance companies were starting to grow and expand in Greece. Christos gets married to Maria, a high school graduate working as a saleswoman, and in 1999 they have a son, Michalis. Six months after his birth, Maria had to go back to work, and it was the grandmothers who took over his care. At the age of three, Michalis is enrolled in a private kindergarten, which was chosen based on recommendations from other parents, and the activities it offered –English, music, computer lessons, swimming. In 2005, they decide to buy their own house (the took out a loan, like many other people did at the time) and Michalis starts elementary school in the local neighborhood public primary school. He starts English lessons in the third grade of primary school at a private tutoring school located near his home (he gets the first certificate at the age of 14), and at the same time does athletics at a local sports club. On weekends, he attends painting and basketball classes offered by his school's Parents' and Guardians' Association. In the last grades of primary school, as well as in junior high school, he takes private lessons since he has difficulty in coping with school. In the last two years of senior high school, he enrolls in a private tutorial school to prepare for university entrance exams. Michalis is admitted to the accounting department of a TEI (now AEI) located in a small provincial town. After staying there for four years and passing most of the courses, he has difficulty completing his degree and decides to give up his studies for a while. Initially, he works for eight months in a hotel in Cyprus, a friend's country of origin, who got him the job, and then serves his military service. Christos pressures Michalis to complete his degree, since through his acquaintances as an insurance agent, he has already found him a job in an accounting firm.

## *Second case study*

Dimitris was born in 1930 in a small, poor mountainous village of the Peloponnese. He enrolls in the village primary school and in his free time mainly helps his mother – as his father had died when Dimitris was three years old– and his older brother in the fields. Unlike his brother, he manages to get into secondary education and rents a basement room in the nearby city. The only thing upsetting him is that since he has to return to the village on Sundays to wash his clothes, stock up on food and get some money, he can't join the Scouts like some of his bourgeois classmates did at the time. Upon completing secondary education, he is admitted to the Pedagogical Academy –unlike the university departments, there were no tuition fees, thus attracting young men and women from poor rural families. He graduated, completed his military service, and started working as a teacher in primary schools. In one of the villages where he worked, he met his future wife who had only completed primary education –her parents did not allow her to continue her studies in the nearby city. They got married and in 1963 had their first child, Giorgos. At the end of the 1960s, Dimitris was, at his own request, transferred to Athens since he wanted his now three children to have better educational opportunities. Hence, Giorgos, grew up in a petit-bourgeois suburb, at a time when, after school, boys used to play "war" and football in the streets and ride around on their bicycles. He starts English classes in the fourth grade of primary school at a private tutoring school and continues until the first grade of senior high school but without receiving a formal foreign language certification. In junior high school he attends a private tutorial school in the center of the suburb as he needed help in order to pass the entrance exams for senior high school. Being a "talent" in the 800-meter track, he represented his school in the school championships and started training in a historical athletic club in Athens. His parents consented since they perceive training as part of the preparation for the national entrance exams to the Gymnastics Academy (department of higher education). At the same time, he attends a private tutoring school in the center of Athens as well as private lessons at home. When he failed his university entrance exams, he leaves to study economics abroad, a decision he describes as "a transcendence" (ipervasi), attributing it to the great value his parents placed on education. As he says, "education was always a priority, a value in itself for them, hence they never deprived us of anything educational". On the other hand, his parents didn't prioritize expenditure on consumer goods and acquiring consumer habits, "we had a simple, moderate life, just like most people in our social circle". Giorgos, after changing several jobs –from being

self-employed, then an employee in the private sector, an employee with annual contracts in the public sector–, has been a ministry employee since the 2010s. In 1993, he married Irini, a psychologist born in 1966 to a poor rural family, which, due to its left-wing political ideas and the existence of relatives who had university degrees, also consider education important. As a child and teenager, she attended English classes at private tutoring school foreign language school, participated in the municipal cultural association of the village[6], read literature and attended two months at a private tutoring school to prepare for university entrance exams. For Irini and Giorgos, being profoundly involved in raising their children –a girl, Iria, born in 1994 and a boy, Stelios, born in 1995– began from the very first months of their birth by taking them to outdoor public playgrounds daily, even twice a day, and by playing creative games at home with them. They enroll them in public nursery schools and from a preschool age (3-4 years old) they begin to accompany them to museums, art and culture centers, children's theater plays –mainly, to those they considered "important", "pioneering" "experiential", "interactive". They don't accompany their children to the private playgrounds that had just started to operate, since "we didn't like those places which are full of plastic material, unhealthy and not to mention, antiesthetic". Both children study English at the most expensive and demanding foreign language tutoring school in their suburb from the second grade of primary school until the first grade of senior high school, when they attained a higher certification. Iria takes private lessons in French from the fifth grade of primary school till the third grade of junior high school, attaining her first certification in French. From the age of four up until the age of six, she attends traditional dance lessons, firstly at a private cultural club and then at the classes organized by the Parents' and Guardians' Association of her school, where she also takes guitar lessons and Stelios chess lessons (both for a year). From the age of six, Iria starts ballet at a neighborhood private dance school, and she continues until the last year of junior high school when she stops due to knee problems. In the first grades of primary school, both children take swimming lessons at the municipal swimming pool. Stelios also attends football lessons at a private sport club for two years and then basketball lessons, in a private club too, for four years. In the last two classes of senior high school, they attend the most renowned tutoring school in their suburb. At the same time, they have private lessons as the university departments of their choice were highly ranked in terms of score prerequisites (they both manage to get in). They continue with postgraduate studies, Stelios in Greece and Iria with a scholarship abroad. For a number of years, Iria works in NGOs (in positions related to her degree) and

Stelios in private firms. Both are now working in professions related to their degrees earning a sound income. Iria continues to do modern dance in a studio in the center of Athens and Stelios plays chess in an online group and basketball with his friends.

## *Third case study*

Nadia was born in 1958 in a well-off family (craft industry owners) in Athens. Her father, born in 1922 in a poor rural community in the Peloponnese, completed secondary education when the Second World War was declared. Her mother, born in 1932 into a merchant's family in a small city (popular resort of the time) in the Peloponnese, also completed secondary education. While they lived in the center of Athens, Nadia was enrolled in a private primary school in order to be safer and more protected. When they move to a petit bourgeois suburb in the south of Athens, Nadia enrolls in the public elementary school in her neighborhood. In high school, however, her parents decide to have her attend a strict private school –once more, to be in a "sheltered environment", this time in her teenage years. In high school, Nadia takes private French lessons with a French teacher. Since at the private school she attends they have piano classes, which she is very good at, she asks her parents to take piano lessons either privately or at a conservatory. Her father does not consent, as he considers them neither necessary nor useful, insisting that "the piano is not for our social class". Nadia did not manage to get into university, as due to her gender she had no encouragement and support from her parents in this direction –unlike her brother. At the age of 20, she marries a young man of bourgeois origin, who had graduated from law school and was working as a legal consultant in a large firm. They have a daughter, Elsa, in 1980, and a son, Kostas, in 1983. Nadia, unlike her mother, never works and devotes herself to raising her children, meeting their needs for play, activities, and education. Five-year-old Elsa begins ballet lessons at a famous historical private school in the center of Athens, and Kostas, at the same period begins swimming lessons, activities which they will do until the end of junior high school. They also take private lessons in French and piano (again until the end of junior high school). Both children are enrolled from kindergarten to elite private schools. Their father insisted on them attending elite private schools since on the one hand he had also attended one himself, and on the other all his friends and colleagues enroll their children at elite private schools as well. After their parent's divorce, the two children demand and eventually enroll in public schools in the middle-class suburb

where they live with their mother. In their final years of senior high school, they take private tutoring lessons for their university entrance exams. Elsa is admitted to a high-ranking and prestigious university department in Athens, while Kostas doesn't make it and leaves to study abroad. Both continue with post-graduate studies and begin working in their respective fields in the private sector. In 2001, Nadia has a third child, Marilena, from her second marriage (the second husband is a merchant). Marilena goes to public playgrounds, to parks and beaches, to expensive, alternative and creative private playgrounds, and to artistic events for children. At the age of three, she starts dance lessons (ballet and then modern dance and jazz) in an alternative school in the center of Athens, where she continues until the third grade of junior high school. From the age of four, she attends traditional dance classes (for two years) organized by her school's Parents' and Guardians' Association (she enrolls in the public school of her neighborhood). From the first grade of elementary school until the sixth grade, she takes private piano lessons. In the second grade of primary school, she starts swimming lessons at the municipal pool, which she stops a year later because she didn't like swimming. In the third grade of primary school, she starts English lessons at a private foreign language school and at the age of 15 she achieves a higher certification. From the first year of junior high school to the first year of senior high school she is enrolled in a drama school in her suburb. In the first and second years of junior high school she takes up riding lessons in a private equestrian club. Even though she really likes it, Nadia forces her to stop because of her exhaustion due to the multiple activities, the distance, as well as the high cost (expensive lessons, high-cost equipment…), especially at a time when the financial crisis had already begun. In junior high school she takes private lessons to improve her grades and in the last grades classes of senior high school, she enrolls in a private tutoring school to prepare for the university entrance exams. She gets into the department of theatrical studies at the University of Athens. During her studies, she works in a private drama center for children and in a children's day camp in the summers being responsible for the arts activities. After graduation she starts working for an artistic events company alongside her brother who works as a manager. As for Elsa, she gets married (her husband is a former athlete and current coach), has two daughters in 2009 and 2011 and decides to stop working to focus on raising the children. Because of her own negative experience at the private school she attended, she enrolls her daughters in the public school of the middle-class suburb where they live. Every day she accompanies them to public playgrounds and parks, to private activity centers, children's plays and movies. The two girls

began organized activities ever since they were six months old by doing baby swimming and from the age of three by doing swimming, ballet, and taking piano lessons. In the second grade of primary school, they start English and in the fifth grade French lessons at a private tutoring school in their suburb. Both continue to swim, the older daughter does polo and the younger one artistic swimming at a competitive level now, which means long hours of almost daily training. Elsa accompanies them to the competitions to various parts of Athens or Greece. To cope with the schedule, the two girls take private lessons in English and French and have given up piano lessons. Moreover, to ensure that they continue to be good students at school, Elsa sets two conditions. They go to training only if they have finished their daily homework and if their grades at school are good.

## Extracurricular children's activities from the 1960s to the 1980s. The gradual expansion of the field

In the 1960s and early 1970s, when four of the informants were growing up and becoming young individuals, there was a notable increase in the number of young people being admitted to universities. A university degree was becoming a key qualification for getting a "good work" , that is to mean a white-collar job in either the public or the private sector. Consequently, students in the final grade of high school, began attending private tutoring schools in order to prepare for national university entrance exams. During that period, few children and teenagers were enrolled in extracurricular activities. The differences in terms of formal education (private or public) and of extracurricular activities were associated with factors such as place of residence (rural/urban), gender and social class.

Two informants, Katerina and Nikitas, who were raised in mountainous villages, reminisce that as children after school and farm work they used to play in the fields and neighborhoods. The only extracurricular activity available was the parish Sunday schools. They both managed to study in high school, as their parents strongly believed in the value of education and were determined to make financial "sacrifices". Initially, Katerina and Nikitas had to leave their villages to complete their secondary education settling in the nearest town in which there was a high school and attend private tutoring schools in order to prepare for the university entrance exams. In Katerina's

case, her family's effort was also related to overcoming dominant gender perceptions, as girls' moving away from home to study was frowned upon in rural communities during that period.

The two informants, Andreas and Nadia, grew up in Athens, completed secondary school but did not go on to higher education. For Andreas, the restrictive factor was his class origin, his parents were factory workers, while for Nadia, it was her gender. However, during their adolescence, both had the opportunity to participate in extracurricular activities. At the age of thirteen, Andreas started English lessons in a private tutoring school located in the center of his suburb, trumpet lessons at the Municipal Philharmonic, and he joined the Scouts. His parents pressured him to enroll in English courses, believing that learning English would be "useful" in improving his chances of finding a white-collar job. They also encourage his involvement in music and the Scouts, thinking this could safeguard him from delinquent behavior. As already mentioned, Nadia's social class enabled her to enroll in private schools and to take private French lessons.

Informants born from the mid-1960s to the mid-1970s (the majority of the informants), who grew up in rural areas or in the suburbs of Athens, used to play in "streets", "unbuilt plots" of their neighborhoods. Those who grew up in the center of Athens used to play at friends' houses and yards, in squares, parks, or at public playgrounds. Middle- and upper-class children were enrolled in private schools, attended expensive and prestigious extracurricular activities, thus, validating and reproducing their social class and status. The petite bourgeoisie enrolled its children in private tutoring schools which have now expanded to the suburbs as well, ensuring that they successfully complete secondary education and are admitted to higher education. However, until the mid-1980s, the reputable tutoring schools, that guaranteed successful results for university entrance exams, were mainly located in the center of Athens. Foreign language tutoring schools were beginning to operate in the center of working class and petty-bourgeois suburbs, with children attending them at increasingly younger ages. Thus, while those born in the 1950s begin in the early years of junior high school, those born in the early 1960s begin in last grades of primary school. As for those who are born in the late 1960s up until the mid-1970s, they start in the first grades of primary school. Parents consider learning a foreign language an essential qualification, an "asset" (efodio), in order to secure a

"good" job, still conceived as a white-collar job in either the public or the private sector. Perceptions and attitudes towards other paid extracurricular activities are also changing over the years. Initially, attending such activities, non-utilitarian and therefore deemed unnecessary, was linked to talent (as in George's case) and thus mainly to future use –such as the prospect of working in a specific field, for example becoming a guitar teacher, a gymnast or a coach. During that period, the educated petit bourgeois families were still unwilling to enroll their children in activities associated with the upper classes. The distinction between the working class and the petite bourgeoisie is shaped by the extent of parental emphasis placed on success in formal education, (completion of secondary education and admission to university) and attending foreign language classes.

Zoe was born in 1964 and raised in a petit bourgeois suburb of Athens. She is a bank employee, holding a university degree, and being actively involved in theater, artistic groups, and events since university years (high cultural capital). Her parents, civil servants (with post-secondary studies), insisted that she and her older sister had to study at university, as "they firmly believed that they had to offer a sound education to their children… their aim was to secure us both financially and professionally". As a result, both girls attended private tutoring classes in the final year of senior high school in order to prepare for university entrance exams. Moreover, they started English language tutorials in the final grades of primary school and French lessons in the first year of high school. Despite Zoe's desire to attend piano and ballet lessons, like her best friend Olga did, her parents did not allow her to do so. In Zoe's opinion, the issue was not financial, but a matter of priorities and mentality. Her parents dismissed extracurricular activities which they considered neither useful nor compatible with their social class, "my parents believed that playing the piano was for high society only". On the other hand, she mentions that Olga's parents were second-generation Athenians, educated bourgeoises, who lived in one of the "villas" which had been built, when the neighborhood had not yet been "invaded" by post-war internal migrants.

Pavlos, a car mechanic born in 1965, grew up in a working-class suburb of Athens. His mother was a seamstress and his father was a factory worker both having completed primary education. He began English tutorial classes in the fifth grade of primary school, as his parents considered it useful for

his future, stating that "everyone attended such classes at that time". He also attended a parish Sunday school, for a while, at the insistence of his religious parents, who believed that by doing so they could protect him from getting involved in "delinquent" behaviors. When he was in the second grade of junior high school, he decided to stop taking English lessons. In the third grade he took up taekwondo lesson at a private martial arts school in the neighborhood, where some of his friends were already enrolled. Having completed his first year of senior high school, he decided to drop out as he neither liked school nor was a good student. He started working in a car repair shop, where he had been working in the summers since he was 14 years old. At the same time, he stopped taekwondo since he considered it too "gentle". He then took up kick boxing in a neighboring suburb as, according to him, "it is tough…there is real fighting, punching and kicking…what I really liked". In the first couple of years, he took public transport and later on he was going there by the motorbike he bought with the earnings from his salary. Pavlos' actions did not surprise his parents who allowed him to make his own choices. The decision to drop out of English and school, as well as taking on a paying job was not due to financial need. It was in accordance with his family's class position in terms of the total capital possessed –small capital in its three forms. Through earning and managing his own money, becoming independent from his family, and practicing "tough" martial arts, along with buying and riding a motorcycle at a young age, he was constructing and performing a working-class male self (see Willis, 2012).

In rural communities the parents' focus was on their children's formal education, alongside overcoming economic difficulties, the need for working hands, the conservative gender perceptions, and in certain instances, the considerable distance to the nearest secondary school. As there were no private activity centers –in several communities there were cultural centers that offered activities–, the children at best, attended private tutoring schools for English as well as private tutoring schools to prepare for the university entrance exams. Despite the general similarities in living conditions, perceptions, and objective limitations, there were also different parents' perspectives, on both formal and informal education, related to family's not only economic but mainly social and cultural capital. That is to mean, differences based on political ideologies, the existence and frequency of contacts with friends and relatives who hold university degrees and white-collar jobs, the

frequency of visits to large urban centers as well as their children's school performance (Irini's case).

Those born in the late 1970s and mid-1980s, face a significantly changed reality. Children no longer play alone in streets but under their parents' supervision, in public playgrounds, in the unbuilt place at the entrance of the new apartment buildings (pilotes), at their friends' and classmates' homes. During this period, not only is the number of private primary and secondary schools growing steadily, but they are also branching out into the suburbs of Athens. This increase is due to the aspirations of petty bourgeois families for a better education, to their concern to find a more protected environment, to the financial ability to support their choice as well as to the necessity for both parents to work. With the continuous expansion of university departments across Greece, accompanied by an increase in student admission, holding a university degree has become nearly indispensable in order to secure a "good" job. Within this context, additional qualifications and titles, such as foreign languages, computer skills, and postgraduate diplomas, are beginning to play a key role.

Many young students attend tutoring schools from as early on as junior high school and some even from primary school to improve their school performance. The majority of students, however, attend them in the final years of senior high school in order to prepare themselves for university entrance exams –reputable private tutoring schools now also operate in the suburbs of Athens. From the early grades of primary school, they begin taking foreign language classes either in private tutoring schools, that now operate in neighborhoods and not only in the center of suburbs, or by taking private lessons –depending on the family's financial ability. Learning a foreign language, now more than one, is still considered an essential, useful, asset for children's future job prospects. In the middle-class and petite-bourgeois areas, private and municipal sports clubs are on the increase; conservatories, private activity centers offering dance (initially mainly ballet), martial arts classes begin to operate in suburban neighborhoods. This development facilitates children's participation, thus making it accessible and appealing even for low-income families. Parents now perceive extracurricular activities not only as playing a fundamental role in children's "socialization", since free play with peers is much more limited both timewise and spatially. Nevertheless, formal education and gaining admission to higher education

remain prevalent. Thus, regardless of how important these activities are considered, children stop attending them to focus on university entrance exams –which is still the case up until today.

Families with a higher overall capital enroll their children from a young age in many different activities, in expensive and renowned private centers. Those with a smaller total capital enroll their children in activities at an older age, in fewer, more conventional and affordable ones, offered by municipalities or by more reasonably priced private activity centers. Educated petite bourgeoisie now enroll their children in activities that in previous periods were associated with the upper classes (e.g. ballet, tennis, fencing). At the same time, the expression "I am really looking into it" (to psaxno poli) is beginning to be used by these parents. An expression that captures their constant anxiety, desire and effort to secure the best schools (private or public), tutoring schools and activities for their children.

Neli was born in 1976 in a working-class area in the center of Athens where numerous small factories were situated –her parents were working in one of them. As a child she used to play in the neighborhood where everyone knew each other, and so, her parents would allow her and her brothers to play outdoors with the other children. She began taking English tutoring classes in the fourth grade of primary school and continued up until the third year of junior high school. In the fourth grade she also took up martial arts (karate) classes for two years, as she wanted to be with her two older brothers and to be able to defend herself from possible attacks in the street. In the final years of senior high school, she attended private tutoring school to prepare for her university entrance exams, but she was unsuccessful in gaining admission. In the months to come, she started working as a saleswoman in a large department store in the center of Athens, where she remained until the birth of her children.

Antonia, born in 1978, is the only child of two doctors. Her father had graduated from the most expensive and prestigious private school and her mother from a model public girls' school (Protipo) in Athens. Both pursued post graduate studies abroad, where they worked for years until they returned to raise Antonia in Greece and settle in an upper-class suburb of Athens. She is initially enrolled in an expensive and prestigious historic private kindergarten and primary school. As she feels "unhappy" there, when she finished the second grade of primary school her parents enrolled her

to the local public school, where she completed her primary and secondary education. Between the ages of three to five she attended classes with the Orff system – a novel approach in Greece at the time– at a nearby private center. In the first grade of primary school, she started ballet lessons at an expensive private center and at the same time, took up swimming and gymnastics lessons. In fourth grade she stopped her previous activities and began tennis lessons at a private tennis club, where her parents used to play tennis. In the third grade she started English lessons in a private tutoring school and in the final grades of primary school she took up private lessons in French and piano. From the first grades of junior high school, she began private lessons primarily to improve her school performance and in the final years of senior high school in order to prepare for the university entrance exams. Antonia was admitted to a prestigious university department in Athens and furthered her education with postgraduate studies. Leading to the birth of her son, she worked for a multinational company and continued to play tennis with her parents and friends at the club. In her case, belonging to the highly educated upper middle class (with intergenerational family depth), *morfosiolatreia* was not only associated with entering university, but with attending numerous, expensive and prestigious activities from a very young age. Her parents aimed at providing "useful" knowledge (i.e. foreign languages) as well as at molding a well-rounded personality.

Born a few years later, in 1985, into an educated petit bourgeois family (her parents were university educated civil servants), Christina holds a university and a master's degree and is now employed in a ministry (as does her husband). She attended the first three grades of primary school in a small family run private all-day school, since her parents were working until the afternoon and had no one to look after her. Later on, they moved from the center of Athens to a left-wing working-class suburb, where they bought an apartment in a newly built block of flats. It was in the "piloti" where she played with her classmates (and neighbors) from the public primary school she had enrolled in. She started ballet at the age of four, "for something girly", chess in the first grade of primary school, English in the third grade and German in the fifth, swimming, volleyball, traditional dances, harmonium, and then guitar. As she stated, her parents wanted her to learn foreign languages because they considered them an "asset" and to

participate in extracurricular activities so as to be with other children, "for my socialization".

> I've done everything. So, for many years, I had an activity every single day. On Fridays I had three and it was my best day since I had them all together. Over the years, I gave up most of them, because I got very tired. One day I almost fell asleep in the pool. The training was late, after eight o'clock in the evening... I remember doing the backstroke, looking up at the lights on the ceiling and at some point, I dozed off, it became dark, because I couldn't keep my eyes open.

In the second year of senior high school, Christina quits English, German, ballet and piano lessons, which she had been taking continuously up until then, to focus on preparing for university entrance exams. Her father, after "having really looked into it", enrolled her in a renowned tutoring school in a neighboring middle-class suburb. Initially he would drive her there himself until she got used to going on her own by bus.

## Extracurricular activities from the mid-1990s to 2009. The strengthening of the field

Since the mid-1990s –when the first children of most of the informant were born–, Greece is living the years of economic prosperity, real (increase in wages and incomes), illusory (consumption through credit cards and loans which are eventually overdrawn) or ephemeral (investments and profits in the Athens Stock Exchange and money eventually lost for the vast majority). Private schools and the number of children enrolled in them –mainly in primary school– are increasing, as many families either have the financial ability and the desire, making their economic prosperity visible to others (a symbol of economic capital), or/and the need due to the work of both parents[7]. The number of university admissions is also constantly increasing, since university departments continue to grow and spread throughout the country, as does the wish and financial capacity of more and more families to send their children to university.

Children no longer play in the streets, and they finally lose their last free space, as "pilotes" turn into parking lots. In this context, the parents start thinking about how and where to spend their children's free time, a concern that is linked to the flourishing of unorganized activities. The first

private playgrounds, with large plastic inflatable toys, begin to appear in suburbs of Athens, ensuring controlled and safe play for children under the supervision of employees as well as moments of relaxation and sociability for parents having coffee or a drink and a chat with other parents. Families with higher cultural capital avoid taking their children there (except for the parties to which they are invited), as they consider them "unsightly", "unhealthy plastic cities" lacking any educational and creative character. They prefer to accompany them, from a very young age (usually from the age of three), to museums, to children's films and theatrical performances, after "having really looked into it" by reading newspapers, magazines, programs of "quality" children's theaters, of Greek National Opera, Athens Concert Hall or by asking friends, colleagues, relatives who are "connoisseurs" (strength of social capital). Parents with smaller cultural and social capital accompany their children from an older age (first grades of primary school) to commercial films (blockbusters known from TV commercials), rarely to children's theatrical plays –those of the big commercial stages–, and almost never to museums.

Most children start English tutorials from the first grades of primary school, while some (depending on the family's economic and cultural capital) start a second foreign language (French or German). Many children are enrolled in local private or municipal sports clubs that increase the variety of sports offered and are now oriented towards mass and not only competitive sport. The Parents' and Guardians' Associations strengthen their presence by offering (at very affordable prices) sports, and cultural activities (music, theater, painting, dances, chess classes) on the school premises and on a regular basis. Parishes also enhance their Sunday schools by offering activities such as ping pong, choirs, traditional dances, board games, basketball and volleyball. Private activity centers are constantly growing, spreading now into suburban neighborhoods, and providing an ever-increasing variety of activities.

Thus, in this period the participation of children in extracurricular activities in Athens becomes almost self-evident for the majority of families, yet in different ways, with different conceptualizations and expectations. Middle class as well as the petite bourgeoisie, especially the educated one, is constantly involved in the creative upbringing of children from the moment of birth. They play with them (inside or outside the house), they engage them

in creative activities (e.g. toddler's and children's theatres and museums), and they enroll them in organized extracurricular activities, aiming to shape their personalities as well as to make them happy. They insist and support this "concerted cultivation", despite the triple burden on themselves in terms of time, money and physical effort, since they believe that this constant engagement is the proper way to raise children nowadays. Even though they themselves as children may not have experienced the same daily and constant commitment to having their needs and desires met by their own parents. In this context, the educated petty bourgeois families enroll their children in more activities, from a younger age as well as to those which in previous decades were identified with the upper classes. They also perceive participation in activities in a different manner, since it is no longer only the element of future use that is important, but also the aspect of pleasure and the formation of well-rounded personalities through "stimuli". Thus, what emerges is an intensive style of parenting, and an expanded form of "morfosiolatreia", both leading to an intergenerational accumulation of qualifications and titles. As far as lower class/smaller total capital families are concerned, they follow this general tendency, but without being as fully committed to the intensive and "quality" upbringing of the children. They focus more on the usefulness of the activities, so as to prevent delinquency in the present and ensure future employment opportunities.

Zoe, after "having really looked into it" by asking her friends (a social network comprising of people who were culturally and politically active in her suburb), enrolled her daughter, Victoria, born in 1995, in an expensive, alternative nursery in the petit bourgeois suburb where she lives. Ever since her daughter was three years old, she accompanies her to children's theatre plays, puppet theatre, artistic events (concerts, ballet, and opera performances) held in renowned venues, such as the Herodeion, the Greek National Opera, and the Athens Concert Hall. In the first grades of primary school, Victoria starts English, ballet lessons in a renowned private school in the center of Athens, private piano lessons (Zoe even took out a loan to buy her a piano) and in the last grades of primary school French and swimming classes. She is enrolled in the public primary school in her neighborhood but continues and completes her secondary education at a music school (a public school where admission is based on exams). In her final years of senior high school, she attends a tutoring school in her suburb and gains admission to an

art department at the University of Athens. While she is a university student, Victoria is also completing her piano studies and she earns a small income by teaching piano to children. Victoria carries on with postgraduate studies abroad, where she combines study with work, as her mother's finances were not particularly affluent. Following her parent's perceptions, Zoe considers it imperative for her daughter to learn foreign languages, acquire a university degree and, taking it a step further, a postgraduate degree (intergenerational accumulation). She transcends her parents' *heritage* by placing emphasis on cultural activities which she sees as valuable "stimuli and experiences", by ignoring the utilitarian aspect, and by not perceiving them as an upper-class privilege. Zoe supports her often expensive choices despite the economic difficulties due to her low incomes –a modest salary and irregular alimony payments. Her finance situation was worsened the years of economic crisis (the government reduced public servants' salaries) which coincided with Victoria's adolescence and university studies. Zoe is proud to say that "we may not have had food in the fridge, and many blamed me for that, but Victoria didn't miss out on anything educational and cultural", ranging from activities, to expensive nursery, tutorials, studies abroad.

Katerina and Andreas, a couple now, employees in the public and private sectors respectively, with higher economic rather than cultural capital, live in a petit bourgeois suburb of Athens. Both are actively engaged in raising their two sons born in 1998 and 2000: daily walks to parks, public and private playgrounds, go-karts, children's theaters (frequenting the most commercially prominent theatre stages of Athens) and movies (blockbusters advertised on TV). They enroll their children in a private kindergarten in their region (as they were not eligible for enrollment in a public kindergarten) and later in a religious oriented private primary school, seeking a "secure" environment as well as a faith-based education. However, their sons found themselves stifled in this school. Despite their disagreement, Andreas and Katerina finally agreed to enroll them to a public junior high school in their suburb, one that they chose after "having really looked into it". The two boys from the first grades of primary school are enrolled in various activities: English, German, swimming, piano lessons (breaking through both class and gender barriers), gymnastics, tennis, parish Sunday school, basketball, capoeira and the electric guitar. There were three criteria on which they based their belief on the value of activities: children's recreation, the formation of a

well-rounded personality and future usefulness. The two boys ended these activities in the final years of senior high school once they began attending private tutoring schools to pass the university entrance exams. Both boys gained admission to high-ranking university departments in Athens and went on with postgraduate studies.

Pavlos is married to Maria, who had completed senior high school and now works as a saleswoman, and they live in a heavily populated and low-income area in Athens. When their daughters, born in 1994 and 2000, were young, they didn't use to take them to parks and playgrounds due to their long working hours, their concerns about safety in the neighborhood, "there had been shooting incidents", and the predominant presence of migrant children, since Greek parents preferred to keep their children at home. With no private playgrounds neither extracurricular activities offered by private centers, by municipality or by the school's Parents' and Guardians' Association given that "few families could afford to go...", their entertainment was confined to Sunday walks on the beach. His oldest daughter, Dora, had English lessons from the fourth grade of primary school to the third grade of junior high school and French in the sixth grade of primary school for she had difficulty coping with this subject at school. While at the beginning the lessons were in a tutoring school, she later had private tutoring lessons at home as her parents wanted to spare her the trouble of commuting, and since at that time (before the financial crisis) they could afford it. Thinking along the same lines, that is to avoid commuting especially in the evenings as the area was dangerous, Dora took private lessons at home to prepare her for the university entrance exams with two tutors recommended to Pavlos by his colleagues. A decision that he considered unsuccessful, as Dora was not admitted to a university department but to a TEI which she was not interested in. So, she enrolled in an IEK (Vocational Training Institute) to become a beautician. His second daughter, Theoni, also took private English lessons, but did not take up French, as "she was a good student at school". Ever since the second year of junior high school up until the first year of senior high school, Theoni enrolled in a private dance school taking Latin and tango classes, type of dances and dance schools flourishing at that period due to a popular TV talent show. That was an expensive extracurricular activity not only because of the monthly fees, but also because they had

to participate in parties, dance competitions, pay for the entrance invitations and buy dresses, accessories, shoes, hairstyle and make-up. What made Pavlos and Maria continue to support this choice was the promise that Theoni could get a diploma that would allow her to work as a dance teacher from the age of 18 and thus be able to support herself financially. In her final years of senior high school Theoni took preparatory classes for university entrance exams at a private tutoring school, recommended to them by a high school teacher, cousin of Pavlos, and she managed to get into a middle-ranking university department in Athens. While studying at the university, she worked in a coffee shop to earn her own money and so as not to burden her parents –their wages had been reduced due to the financial crisis.

In Pavlos' case, it was not only his social class but also his place of residence which informed his choices in the upbringing of his daughters and their participation in activities. Being perceived as dangerous lead to restrictions on social interactions and movement aimed at safeguarding the girls and preventing downward mobility –joining the urban underclass. Furthermore, there were not many organized activities available (both in private and public centers) due to lack of demand as a lot of parents had neither the financial means nor the cultural predisposition to enroll their children. Thus, his social network (understood as the people one interacts with in his/her daily life at work, in the neighborhood, at children's schools and private tutoring schools, parks, playgrounds, activity centers) was not conducive to such engagement (a case of small social capital). Conversely, girls from families with similar class position but living in petit bourgeois suburbs of Athens were enrolled in more activities and from an earlier age either in the municipality, in Parents' and Guardians' Associations courses, or in private centers. In case they took dance classes, they preferred ballet, hip hop, and modern dance. Moreover, rather than focusing on preventing delinquent behavior or securing immediate job prospects, the parents' main concern was for their daughters to participate in something pleasant, creative, and beneficial for their health, sociability and personal development. In other words, the place of residence and the social network (social capital) were conducive to the enrollment in activities which the girls of the petite bourgeoisie also attended.

## Extracurricular activities from the period of the economic crisis until today. The establishment of the field

Children born from the mid-2000s to the mid-2010s, grow or are born during the economic crisis and the Memoranda (2009-2018). During this period there is a decrease in family incomes either due to a reduction in wages (public and private sector employees) or profits (entrepreneurs, traders, self-employed) or to periods of unemployment. Thus, people had to cut their expenses and/or work two jobs to supplement their reduced incomes. Many educated young people (with degrees, Masters, PhDs, foreign language certificates) migrate abroad to find work equivalent to their qualifications, a phenomenon known as *brain drain*. The years of economic crisis are followed by a new difficult period in terms of work, finances, and education due to the coronavirus pandemic and the long-term restrictive measures adopted in Greece. For many months, most of the private sector white collar employees were in suspended work status (with little financial compensation), traders and professionals had their shops and businesses closed (also with little financial compensation), a situation that once again affected family incomes and the ability to spend money. Children's activity centers, as do the schools, remain closed (some operate with online courses) for one year (March 2020- May 2021), with short intervals of operation in between. In the following years, until today, the economic and labor difficulties continue as there is stagnation and/or reduction of incomes, increase in housing costs (rents, loan repayments, electricity, and heating bills), in transportation costs (expensive petrol), rising prices –mainly in basic consumer goods.

Despite these great difficulties at an economic and occupational level (or perhaps precisely because of them?), there has not been a decline in children's participation in paid extracurricular activities with public and private activity centers continuing to operate and even expanding. There are now baby theaters, private creative activity centers, where play has pedagogical goals; it is adopted to each age group's abilities and needs; it is not simply supervised (as in ordinary private playgrounds) but organized and guided by qualified adults. Private kindergartens offer, as part of their curriculum, kinesthetic and Orff classes, music, drama and English courses. They also provide opportunities for children to participate in extracurricular activities –football, tennis, swimming, ballet, rhythmic gymnastics, learning

of musical instruments–, which incur extra charges and take place either during or after school hours, i.e. until seven in the afternoon. This last option is preferred by parents who work late, as this arrangement ensures at the same time the care of their children and their involvement in creative and enjoyable activities. The whole process familiarizes and introduces parents to the world of extracurricular activities, leading them to enroll their children in private or public centers, depending on their financial means and their residential suburb. Parents' and Guardians' Associations are becoming more and more active, offering a wider range of activities at affordable prices. However, in low-income areas, especially those in the center of Athens, they offer fewer activities, since there is lesser demand, and more conventional ones (such as football, basketball, traditional dances…). On the contrary, in petit-bourgeois and middle-class suburbs a greater variety as well as more "novel", "alternative" and "unconventional" activities are offered, e.g. ceramics, sculpting, drawing, musical instrument instruction, choir clubs, drama, modern dance, hip hop, and robotics.

Foreign language centers have begun offering classes for preschool-aged children at very low prices, even free of charge for the first year, coupled with better prices for siblings. In low-income areas private extracurricular activity centers reduce tuition, while in petit-bourgeois and middle-class areas, increase the variety of activities offered. As a result, dance schools, in addition to classical ballet, now offer a plethora of other options such as kinesthetic and Orff classes (for toddlers), modern dance, rhythmic gymnastics, gymnastics, hip hop, oriental, Bollywood, yoga and Pilates. Swimming in pools now starts at the age of three and not at the age of five as was the norm in previous decades. Private swimming pools aimed exclusively at children are starting to operate in middle- and upper-class regions of Athens launching a new activity, baby swimming, where babies can swim with one of their parents (in some cases with grandparents or nannies), initially from the age of six months and in the following years from the age of two months. Martial arts schools located in middle and upper-class suburbs, alongside the more popular, traditional disciplines, such as karate, judo, taekwondo and kung fu, now in conjunction with newer options initiate classes such as tai chi, aikido, capoeira, Japanese fencing. In these suburbs, new private centers open launching novel activity courses, such as robotics and stem. In fact, as these types of classes become more widespread, they

are also offered by Parents' and Guardians' Associations in public schools, with the educated petite bourgeoisie rushing to enroll their children. In this context, middle- and upper-class families ensure "distinction" by enrolling their children in expensive, private, and prestigious centers. Correspondingly, when girls from petit-bourgeois families, attend ballet classes in the private dance schools of their suburbs, the more privileged families achieve "distinction" by enrolling their daughters at expensive, prestigious dance schools. In these private dance schools, situated in middle and upper-class suburbs or in the upscale areas in the center of Athens, courses are held with live music (piano) and are taught by instructors with diplomas from renowned schools in Greece or abroad and/or with a previous or currently career abroad or/and in famous artistic groups in Greece.

Neli gets married at the age of 24 and lives with her husband (a high school graduate who is now self-employed) in a low-income area in the center of Athens. Neli's son, Petros, is born in 2004 and her daughter, Mania, in 2006. A year after the birth of her daughter, Neli was fired from her job. Then, she decides to stop working, since she is not satisfied with the jobs she comes across (low wages and long working hours). Therefore, she believes that it would be better to stay with her children at home, thus avoiding the expenses on nurseries and hiring a part-time nanny –that would require her entire salary. So, she accompanies her children to parks, public and private playgrounds and later on to bowling alleys and roller-skating rinks, to children's films but not the theatre. Both children start baby swimming at a public pool when they are six months old and continue up to the age of two. In the first grade of primary school, they take swimming lessons for a year and stop because they get tired of the process (undressing, showering, swimming, showering, getting dressed, and drying their hair). Petros in the first grade of primary school starts football classes in a local team, in the third grade he starts English classes in a private tutoring school, along with his sister, and in the fifth-grade private lessons as he has difficulty coping with school. When Mania is five years old, she starts traditional and modern dances organized by the Parents' and Guardians' Association of her school. Once Neli realizes that Mania really likes dancing, she enrolls her in ballet lessons, which Mania later quits as she prefers Latin and Oriental dance because of a TV program she enjoys watching. They, subsequently, enroll her in a private center which Neli considers adequate as it offers the

opportunity to participate in competitions and acquire certifications (Mania at the age of ten already has two "small" certificates). Although participation in this type of dance is very expensive, Nelly supports it, believing it is something her daughter enjoys and hoping that after the age of 18 she will obtain a qualification that will allow her to work as a dance teacher (the whole concept and practices are similar to those in the case of Theoni). Neli considers learning English essential for her children's future, an "asset". She sees swimming, dancing and football as sources of pleasure, socialization and physical exercise for children –perceptions held by families with higher total capital in the previous period in Athens–, and at the same time as a way to help them stay out of trouble –an issue that does not concerned that time families with similar overall capital living in petit-bourgeois suburbs. Thus, contrary to what is highlighted by the international literature on working class families, she tries to provide her children with activities. Moreover, she and her husband are organizing their daily and weekly time and sociality –coffee and outings with other parents while waiting for their children to finish their activities– around children's needs and activities. However, apart from swimming and English classes, the other activities in which her children are enrolled have clear class and gender characteristics (football and dance).

Nikitas, a PhD holder with a prestigious position in the academic field, lives in an upscale area in the center of Athens. His daughter, Dimitra, was born in 2011. In addition to daily playtime in public playgrounds and parks, she is involved in the creative aspect of his daily life –photography, reading books, enjoying classical music, and opera. At the age of five Dimitra starts ballet at a dance school and piano private lessons, both because of her "talent". She starts learning English because the other children in the kindergarten have already started –some even had English-speaking nannies. Nikitas understands Dimitra's participation in activities in a very conscious way due to his studies in social sciences. He describes them as "a core of challenges for the child… opportunities, and possibilities… a whole world… that broadens horizons", stressing the need for early familiarization. Furthermore, he associates extracurricular activities with Dimitra's future not in terms of professional usefulness but in terms of shaping a well-rounded personality –in fact, of "making up" of a middle-class girl.

He considers these activities essential, despite the financial and personal time constraints involved.

> I know that everything is inscribed from a very young age, from when they are babies... all are inscribed as directions, as worlds, as habitus. No one builds in a vacuum. Everything is traced back to the first four to five years. All this is a bill of 300 euros per month. It's upsetting me, but I believe I am doing the right thing, I do it out of conviction… It means that I'm cutting back on some of my personal expenses, so that Dimitra has the chance to join these activities. My own outings, my own books and I even limited the use of my car… I don't have the feeling of sacrifice or a sense of parental duty. I have faith in this.

Thus, it is Nikita's high cultural capital (in its three forms), accumulated over time through his own effort as well as on a habitus formed on the basis of his parents' *morfosiolatreia* –that is the desire and practical support of his parents to study in order to "escape from the fields", as he says–, which makes the question of money, time and tiredness not insurmountable obstacles to Dimitra's enrollment to many and expensive extracurricular activities. Moreover, the role of place of residence and social capital is also central, to the extent that Dimitra in her daily life interacts in playgrounds and kindergartens with children of middle and upper middle-class families with high total capital, who are involved from infancy in prestigious practices and activities.

If for all the previous cases mentioned the issue of financial burden arises to a greater or lesser extent, this does not apply to the case of Antonia. Antonia's father has put aside a significant sum of money for the studies of his grandson, Giannis, and he generally supports them financially, e.g. vacations and trips abroad. Her high economic, social and cultural capital (upper middle class with intergenerational depth) lead her to specific preferences and practices in an imperceptible, "natural" way. Giannis was born in 2010 and grows up in a petit bourgeois suburb where his father's house is situated (Antonia's husband has a postgraduate degree and works for a multinational company). When Antonia returns to work, they hired a nanny with a degree in pedagogy to look after him as well as engage him creatively. At the age of three, they enroll him in one of the most expensive and prestigious nurseries (by now she has decided to stop working to raise her son), and later in one of the elite private schools. Giannis's schedule is

full of daily walks to the playground and parks, reading books, doing puzzles, painting, board games, and creative activities i.e. Lego and modeling. At nine months old, he attends his first baby theatre performance, at the age of two, interactive puppet theatre. At the age of three, he attends children's theatrical plays, ballet, and cinema, visits galleries, museums not only in Greece but also abroad where he often travels, initially with his family and later with his school.

Giannis is enrolled in more activities and at a younger age than his mother was. As Antonia considers activities "stimuli" to help form a well-rounded personality, she involves him in from infancy and even in some that required her active participation in his early years. That is, they are neither common private playgrounds where children's play is supervised but without guidance, nor creative activity centers in which play is under the guidance of specialized staff but without parents' active involvement. Thus, at eighteen months, he joins a six-month painting program at the Children's Museum; from two to four years old he attends both a music and an art program in a private center; from three years old and up to the first grade of the elementary school he attends art programs at a museum. As these programs requires parental participation, Antonia is always present and by him in class until the age of five. In the following years, while waiting for him to finish his activities, Antonia would have a cup of coffee in the classy museum cafeteria with the other mothers she knew from Giannis's private school. Their children also attend these programs due to Antonia's encouragement, unlike the mothers in her neighborhood (that she has met in the playgrounds of her neighborhood) who were not convinced to enroll their children in the program, despite Antonia's persistent efforts.

At the age six months, he starts organized activities by doing, accompanied by his mother and then his grandmother, baby swimming (up to the age of two). At the age of four he starts taekwondo lessons at a private center in his neighborhood and at the age of six he starts basketball in a neighboring upper-class suburb (where his grandparents live). While his upper-class classmates had started foreign language lessons from a very young age –some had French, English or German teachers and/or nannies so that they grow up listening to the language (early familiarization)–, Giannis starts English from the third grade and German from the fifth grade of primary school. Antonia and her husband thought it would be excessive to start private

lessons earlier, given that in kindergarten they had English lessons and in primary school, in addition to the English class, they have three lessons taught in English –drama, stem and sports. From the first year of junior high school, he starts private lessons to boost his school performance due to the fierce competition and to the teachers' high expectations.

A few years later, the educated petite bourgeoisie (especially in cases with intergenerational depth) actively respond to their "immediately ahead" that is, the middle class. Christina has a son, Iasonas, born in 2015. From the day he was born, she accompanies him to public playgrounds and parks twice a day. While at home they play together in an area of the living room she has set up especially for this purpose with toys that she has very carefully chosen. They begin to go to baby theaters and later on to children's theaters and movies, also after "having really looked into it". At six months old, he starts baby swimming in a private pool for babies and toddlers; at eight months old she accompanies him to an activity center for children aged between six months to six years, recommended by a middle-class friend of hers. This activity center is part of a global chain that has branched out to upper-class areas of Athens. It offers free play opportunities not in plastic but in wooden toys, which create compositions, slides, tunnels, and are specially designed to serve a specific age-related pedagogical goal. Although the game is organized, guided and supervised by educators, parental involvement is also required –in many cases it was the nannies of upper-class children who were playing with them as Christina mentions. This center also offers organized activities, thus Iasonas participates in a music course. The teacher (a musician specializing in teaching babies and pre-school children) plays the guitar and the flute, sings fairy tales, presents musical instruments and lets the children explore them, exposes them to many kinds of music focusing each week on a different one, classical, rock, jazz, ethnic. At the age of four, Iasonas starts swimming lessons in a public pool (three times a week) and chess in a chess club (twice a week). In the first grade of primary school (he attends the public school of the middle-class suburb where they live), he starts guitar lessons every Saturday at the Parents' and Guardians' Association. Twice a week he has painting classes at an art center for children, in which the teacher is a painter (participating in painting exhibitions) and a graduate of the university's art department (Athens School of Fine Arts). Christina admits that Iasonas's schedule is busy and tiring. However, she

maintains that it is not something she imposes on him, but something he really wants to do. "He has so much energy, he likes doing a lot of things, and he really enjoys these activities. Therefore, I'm happy too".

Regarding educated petit-bourgeois and middle-class families today, two observations can be made. The first one is related to the explicit recognition of the importance of *early familiarization* with the world of activities, with early no longer meaning school or preschool children but babies and toddlers. The second one is related to the emergence of a new motto alongside the phrase "I'm really looking into it", which is now used by many parents. The expression "I am happy when my child is having a good time" captures a new perception, according to which parents derive joy from the "quality time" spent with their children, and eventually from the kid's joy. In this context, their constant and intensive involvement is not perceived at the end of the day as a sacrifice, a parental obligation, in some cases exhaustive, but as an enjoyable engagement in their children's lives and even more so as a pleasure in itself. As Christina says, "I'm eager to do things with the kid… he's doing something and you're having fun. When you see your child happy, you are happy".

The flourishing and establishment of the field of extracurricular activities during these difficult decades (economic crises, lock downs) can be attributed to two factors. In recent decades, there has been a "pool" of people, namely parents who are convinced of the value (multiple benefits) and necessity (both current and future) of involving their children in more and more extracurricular activities and from an even-younger age. As a mother belonging to the educated petite bourgeoisie stated whilst talking about her nine-year-old daughter's excessive activities (English classes, sing, piano and dance lessons), "I know it's an exaggeration, but everyone does it in nowadays". Some of these children may in the future receive certificates or degrees of greater or lesser value (depending on the family's total capital and their own effort), permitting them to work in the field of activities, for shorter or longer periods, exclusively or complementary to another job. Subsequently, they contribute to the reproduction and possibly further expansion of this field. The above assumption is not entirely hypothetical, in so far as it is based on the existing current reality which leads us to the second explanatory factor.

The second "pool" of people, contributing to the flourishment and establishment of this field, are people who work either as employees and/or as self-employed (private lessons, courses in different centers) and/or as employers. They may have university degrees, and/or certifications from public institutes and/or private centers, in music, sports, dance, martial arts, computers, robotics, foreign languages. In the decade of the economic crisis, the period of quarantine and during the years of the new economic hardships, these people manage to sustain the field of activities as the strive to maintain their specialized working position and safeguard an income. Bourdieu (1986a: 357), analyzing the new professions, argues that these are the "natural refugee" for two categories of employees. In the first category we can find young people who do not have the necessary official qualifications that would allow them to claim the work positions their social origin promised them. In our case, these are people (middle-class origin) who may not hold a university degree but have acquired qualifications due to extensive studies from accredited, prestigious (private or public) schools in Greece or abroad, as well as their successful course in the field e.g. ballet teachers, music teachers; athletes with medals and national and international distinctions working as chief coaches. In the second category there are graduated people who did not manage to obtain from their academic titles, "all they felt entitled to expect by reference to an earlier state of the relationship between qualification and jobs". In our case, these are university graduates (educated petite bourgeoisie) who can't find a job equivalent to their formal qualifications, because of degree "inflation". They are, for example, gymnasts, mathematicians, physicists, musicians, who could not be appointed to schools (public or private), so they may work as coaches in clubs, teams, camps, as teachers in tutorials, or/and in private or public activity centers, doing robotics, stem, music courses. Based on the findings of the empirical research, I would add a third category which includes young people (working class origin) who in the new fluid and deregulated labor market are trying to maintain their position in the social field exorcising the fear of downward mobility, i.e. proletarianization or joining the urban underclass. This group comprises of young people who do not hold a university degree, but a diploma from short-term studies in low-prestige private schools in Greece, such as martial arts instructors, Latin dance teachers.

## Conclusions

In Greece since the 19th century, the concept of *morfosiolatreia* is related to the effort of Greek families to ensure their children's participation in formal education as well as the acquisition of academic qualifications. Subsequently, they would gain access to white-collar jobs either in the developing public sector of the newly established Greek state, in the private sector in Greece or in the flourishing communities of the Greek diaspora. For the less privileged families, their children's participation in formal education, especially in secondary and tertiary, meant great financial sacrifices. Children of the privileged classes are enrolled in private schools, in universities in Greece or abroad as well as in extracurricular activities, such as lessons in foreign languages, dance, music and sports. By attending these activities, middle and upper classes construct, symbolize and reproduce their class status and position in the social field.

In the 20th century –and especially in the post-war decades– the completion of secondary education and gradually of higher education, is becoming the main expectation for more and more Greek families perceiving it as the main means of securing a "good" job, avoiding agricultural work, labor migration and proletarianization. Consequently, since the 1960s, private tutoring schools have been operating in urban centers to increase the likelihood of admission to university. Ever since the 1970s, private tutoring schools have been expanding in the suburbs of Athens, with weaker students aiming to pass the class, and stronger students to improve their grades and eventually enter university. Many working and petit-bourgeois families began enrolling their children in foreign language private tutoring schools since learning a foreign language is perceived as an added necessary "asset" for their child's working future. At the same time, middle-class families enroll their children in private schools, they offer them private lessons in more than one foreign language, and accompany them to artistic events, museums and theatrical plays. From infancy, these children attend expensive and prestigious extracurricular activities, such as the piano, ballet, fencing and tennis, in prominent and expensive private centers.

In the following decades (1990-2010), families of petit bourgeois origin enroll their children in a second foreign language, as well as in extracurricular activities offered in private centers –dance schools, conservatories and

martial arts schools– that start to operate in the suburbs, in municipalities, cultural and sports clubs and the Parents' and Guardians' Associations. Petit bourgeois families richer in cultural capital accompany their preschool children to "quality" or/and "alternative" theater performances, movies, museums and artistic events. They also enroll them in extracurricular activities which in the previous decades were perceived as the exclusive privilege of upper classes –i.e, ballet, tennis, fencing, piano. They now regard activities not only as "assets" but also as "stimuli", "experiences" and "challenges" that "broaden children's horizons". When needed (long hours of work) or wanted (desire for a controlled, strict or creative school environment), they enroll their children in private or public (experimental, model, music and art) schools. Working-class (smaller total capital) families in Athens, contrary to what is noted in international literature, are not limited to "natural growth". They accompany their toddlers to public and private playgrounds and their school-aged children to commercial films and plays. They don't enroll their children neither to private schools (due to small economic capital) nor to public alternative schools (due to small cultural and social capital). However, they give them the opportunity to participate in extracurricular activities, although in fewer, more conventional, outdated and gendered ones, at affordable private centers or in public centers, from an older age and for fewer years. What they have in mind is to protect them from delinquent behavior and to secure immediate employment opportunities, thus focusing explicitly on the utilitarian aspect of the activities. Middle-class families place greater emphasis on the involvement of their toddlers and children in renowned and expensive artistic and creative workshops, theatrical performances, visits to museums and art galleries not only in Athens but also abroad. They enroll them in expensive and prestigious private kindergartens, schools as well as in classy activities in expensive and renowned private centers and clubs.

Despite the economic crisis, followed by the pandemic and a new period of economic problems, children born in 2010 onwards are not deprived of activities. On the contrary. More and more children participate in even more activities, and from an ever-younger age. The pattern formed during the two previous decades of "economic prosperity", is sustained based on the existence of two "pools" of people. That is to mean, on employers and employees advocating for their livelihoods and on parents recognizing the importance of extracurricular activities for their children –hence expanding

and reshaping *morfosiolatreia*. Differences in social class, both in terms of volume and composition of capital, are reflected in how many and in which activities the children participate: movies or theaters, free play or creative play, ballet and jazz or latin and oriental dance, taekwondo or aikido, boxing or fencing, football and basketball or tennis; in which places and centers: commercial or "quality" films and plays, private playgrounds or creative centers, museums and art galleries, public or private centers and which private centers –prestigious and expensive, or suburban and affordable ones; at what age they start: babies, toddlers, school age children; for how many years and with what systematicity and frequency; with what conceptualizations and objectives: meet their present needs for socialization, playtime with peers, just for fun or as to steer clear from delinquency and fulfil future utilitarian needs. These elements, along with attending public (and which) or private (and which) schools are markers of social class, status and prestige.

And three main conclusions that emerge. Firstly, this process spanning decades, indicates intergenerational access to and accumulation of goods, activities, academic titles, qualifications and thus "better" jobs, seems leading to an intergenerational upward mobility. However, this is misleading to the extent that as all social classes move in the same direction, their distance in the social field is maintained. Therefore, it is rather a reproduction through accumulation and access, through movement and change, and in Bourdieu's words "a displacement of the structure of the distribution". Secondly, the gradual expansion of the field of extracurricular activities coincides with the period when the number of students in higher education was constantly increasing, leading to "degree" "inflation" that results in difficulty seeking employment equivalent to their academic qualifications. The acquisition of additional qualifications, and thus a new expanded form of *morfosiolatreia*, feeds future work expectations, and shapes opportunities and in practice the position in the labor market. In some cases, these additional qualifications reinforce and complement academic titles (such as a university degree or a master's degree), permitting young people richer in total capital not only to avoid unemployment but to claim better positions in the hierarchy of white-collar jobs. In other cases, these qualifications serve as the main and only resource, permitting young people with smaller total capital to avoid unemployment and proletarianization even through access to lower positions in the hierarchy of

white-collar jobs. In both cases, it is rather about "hidden unemployment", to recall Poulantzas. Thirdly, the emergence, formation and reproduction of these new work positions as well as their appeal are intrinsically linked to the existing labor market. That is to mean, temporary, part-time, more than one daily jobs, unregulated and flexible working hours. Thus, intensive, multiple (in the sense of parallel attendance), yet at the same time, voluntary and enjoyable participation in various extracurricular activities (a form of "multi-tasking" in Han's words) from infancy seems to prepare a labor force aligned and suited to the needs of this new labor market. Namely, employees who are constantly active, willing, flexible, predisposed (in the sense of habitus) to exploit themselves.

## Notes

1. As far as class differences are concerned, Nikos Panagiotopoulos characterizes AEI as the "big gate" of higher education. Children from more privileged backgrounds are admitted, acquiring qualifications that, despite the internal differences and hierarchies, lead to better employment opportunities. TEI represents the "small gate" of higher education –there are also internal differences and hierarchies–, as it is mainly children from underprivileged classes that attend them with their degrees leading to technical jobs (Panagiotopoulos, 2016). In 2018 the left-wing government of SYRIZA-ANEL abolished TEI by merging some of them with university institutions and upgrading others to university status institutions. A political decision that challenged and undermined the logic of higher education's "dual network", which (re)produces class hierarchies and inequalities.
2. This decrease is consolidated with the new university law (2022) planned and voted for by the right-wing government of New Democracy, a law which among other issues includes the introduction of the restrictive measure of Minimum Admission Basis (EBE) for entry to higher education. This law also foresees the exclusion of students from the university, should they not have completed their degree within the required period, as well as for a reduction in the number of university departments by either abolishing or merging them.
3. My essay entitled "Class inequalities and children's participation in extracurricular activities in Athens in the first decades of the 21st century" was published in 2022 (Year Book Greek Society).
4. As Antonis Liakos (1988) has argued, since the last decades of the 19th century –when youth was discovered as a separate age category– young people's free

time had to be controlled, as it was perceived as a "haven of freedom" and an uncontrollable source of criminality and/ or rebellion.

5. Those days there were still entrance exams from junior high school to senior high school, which was later abolished in 1981 by PASOK, a center-left government.
6. In 1981, when PASOK came to power, it promoted the creation of cultural centers throughout Greece.
7. On the reasons for choosing private, model and experimental schools in the context of "parental choice", see Fotopoulos and Therianos 2011.

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# The significance of Metaxas' regime for entrepreneurs' attitudes towards working people: The case of barbers

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## Abstract

The following essay discusses the impact of the dictatorial Metaxas regime on working conditions in Greek barber shops. More specifically, the paper, based on the barbers' pressure on Metaxas' government for the extension of the opening hours of their shops on Sundays, focuses on the debate over the particular circumstances under which the concept of class emerged in Greek industrial relations. According to a well established assumption within this debate the fact that the majority of Greek people have been employed in small family enterprises, rendered almost irrelevant the issue of class conflict in industrial relations. Moreover, the norms regulating workers' rights were formulated during Metaxas' regime. The paper focuses on the working conditions in small Greek enterprises in the interwar period and how these conditions converged with Metaxas' patriarchal discourse. It should be remembered that the extension of opening hours on Sundays has been the rule for many small enterprises such as bakeries and patisseries until today, reflecting the remnants of the ideology that ruled labour relations of the inter-war era. The paper deciphers the position of women workers in small family enterprises and how their human rights became the main issue of a struggle organized by feminist groups against Greek traditional patriarchal values and ideas. Consequently, the main argument in the paper is, that gender inequality in the division of labour between women and

men in small family shops had made deeper class inequality between bosses and workers in the same shops.

**Keywords:** *industrial relations, women's movement, human rights, Metaxas' dictatorship.*

## Introduction

### *Barbershops under Metaxas' regime*

The essay is based on the study of the newspapers *Future* (Mellon) and *Small Manufacturer* (Viotechnis) in the interwar era[1]. The two newspapers which had been published from the beginning of thirties up to mid-sixties expressed the values and attitudes of entrepreneurs on various issues concerning everyday life: labour relations, trade union issues, political ideas and family values. *Viotechnis* during the Metaxas regime expressed openly its support for Metaxas and his Minister of Labour Aristeidis Dimitratos[2]. During these years the journal often presented the dictator as the "National Governor" whose magnificent oeuvre served fully the craftsmen's interests[3]. Big personal photos of the Dictator and references to the happy event of the imposition of his junta could be found in the paper on the anniversaries of the dictatorial regime. Within this framework of warm support for Metaxas the barber Dimitris Fessopoulos, who was the ex-president of the barbers' trade union on the city of Pireaus, found the opportunity to put pressure on the government to extend work hours in barber shops. He argued that the extension of working hours was not only agreeable to barbers' interests as businessmen but was also in agreement with the dictator's ideals towards the nation's well-being[4]. In fact, it may be argued that the unscrupulous support that *Viotechnis* offered to Metaxas and his government, may be seen as a symptom of the particular patriarchal culture shared by the barbers[5]. Moreover, the study of Fessopoulos' letters gives us the opportunity to decipher labour relations in Greece, not only in interwar era but also in the years after the 2nd World War. The defeat of the Left in the Civil war of the years 1944-1949 gave the Right the power to extend the enforcement of the labour legislation that Metaxas had imposed. Within that legislation the emphasis was given to employers' interests at the expense of workers' rights. Labour organizations could be lawful if they did not react against

employers' wishes whilst any attempt for the dynamic vindication of workers' rights was persecuted as the oeuvre of communist agitators and was automatically banned. Under these circumstances what was presented as an organized trade union movement in the country was a simulacrum. Having said that, one should not infer that working class agitation was not existent in Greek society, but rather it took a specific path of development wherein the struggle for the recognition of workers' rights was the integral part of a greater political struggle.

## *Labour relations in Barbers' shops*

What is remarkable in Fessopoulos' letters is his nonchalance regarding his staff's needs for rest and physical recovery. It is as if the working people in barbers' shops not only had no rights but they were also entirely voiceless and entirely identified with their bosses. Studying *Viotechnis* one may conclude that in barber' shops the staff included the boss and one or two persons more, usually of young age, almost children. A. Bakalaki (1986) offered us information for gender and class division amongst barbers. The most famous and well-paid barbers were men, the *maitres*, who had established their salons in the center of Athens. Barbers experienced great growth in their business when the first salons i.e., hairdresser's shops for women, had opened during the twenties. Bakalaki stressed that whilst men monopolized the most privileged positions in barbers' professional hierarchy, women were trapped in the periphery of the cities, either as owners of small shops in Athens' suburbia or as assistants in big salons[6].

Bakalaki's findings were supported by the situation in barbers' shops depicted in the pages of *Viotechnis*. The barbers themselves presented the class and gender differentiation in their shops as something pregiven and natural. It is worth mentioning that the patriarchal relations between the bosses and the staff were promoted and consolidated by the Metaxas regime. In fact, the Metaxas government's patriarchal ideology was expressed in its attitude on issues related to labour and gender. Metaxas was proclaimed as the father of the nation, of the small entrepreneurs and their trade unions. The image of the woman on the other hand emphasized women's low spiritual capacity. In the pages of *Viotechnis*, the male craftsman was ascribed great intelligence and artistic talent[7]. The moral chastity of a girl had to be guaranteed when she was employed as an apprentice. The schools for

tailors, for instance organized the advertising of their businesses on that basis[8]. Working women were thus suspected not only of low morals but also of lacking the artistic talent required by particular jobs[9]. In addition, although women participated in public events such as parties and social gatherings, they were not presented by their names in the photos commemorating the events[10]. The women in *Viotechnis*' pages were presented solely as mothers who were unconditionally devoted to their children. The ideal of the self–sacrificing mother was also embraced by Metaxas himself, proving that under his regime women might have a socially accepted role only by fulfilling maternal duties. According to N. Tournaviti - Kaltsogia (1990), in social formations such as Greece, motherhood became the path through which women managed to gain a greater respect and the right to participate in the public sphere. It was only as mothers that women could gain social recognition. Therefore, motherhood was the path through which the women's participation in the public sphere became gradually socially acceptable. For certain categories of craftsmen their union was symbolically presented as a loving mother who sacrifices herself for her children (Koumandaraki, 2019). The symbol of the self-sacrificing mother had a strong appeal in Greek traditional culture, and as mentioned above, it was highly appreciated by Metaxas himself. In October 1936, in a speech he gave to university students Metaxas said:

Great is your destination, women. Certainly, one day you become mothers. The mother is the pillar of the house. The health and the good fortune of the future citizens rely on her… And what could the women do who were deprived of the holy gift of motherhood? They will love as if they were mothers too. For you would see that in any occupation you may have you will commit yourselves to it and you will love it as if you were mothers. And you will love your parents as if you were little mothers and you will love your brothers and sisters as if you were almost their mothers and you will love your husband as if you were his mother and the work to which you will commit yourself you will love it in a maternal way. Wherever you go, whatever you become, whatever age you will be, you will feel always like a mother. This is the damnation of the woman, but also her eternal greatness. (Metaxas, 1969: 72).

Metaxas interpreted women's labour as "mothering" all members of the family, the workplace, and society at large without posing the question as to whether women should take some sort of reward for all their maternal care.

## *Class conflict, Gender relations and Trade Unionism in Small Shops*

In above quote, labour and gender relations are conceived in a way that did not allow women and employees to enforce their political autonomy. It was not only that their rights as employees and citizens were ignored, but their autonomous participation in the public sphere was also considered unacceptable. This fact has significant consequences in the way historians and social scientists theorized gender relations and class conflict in modern Greece. Here it is useful to revisit A. Woodiwiss's study on the significance of representation for social theory (Woodiwiss, 2001). Woodiwiss criticized what he termed "naïve empiricism" as a method in sociology. Based on the work of Martin Jay (1993) and Hal Foster (1998), Woodiwiss argued that the *visible* is socially constructed and the things we may see are the things which we are allowed to see. The application of this thought in the study of the Greek trade union movement is significant given that, as Koukoules (1985) has pointed out, for a long period Greek Labour organizations operated as simulacra of trade unions docile to employers and the state. There have been numerous studies on the over-politicization of Greek trade unions whilst at the same time these unions failed to organize working people around class conflict. Yet as Woodiwiss pointed out, "what is socially visible is not necessary what is sociologically important" (Woodiwiss, 2001: ix). It may be wise to assume that things are not as they appear to be, and the danger lies when that kind of skepticism is absent, because it is then that "social theory becomes simply an aspect of promotional culture rather than its potential antidote" (ibid.). The debates about the visible owe a lot to the French philosopher Jean Baudrillard who, as a leading figure amongst post-modern philosophers, has diagnosed the power of what Woodiwiss called "naïve empiricism" in post - modern societies. Baudrillard had shown that only what is visible gets credit as politically important. This was a theme that he developed in his study of the role of Mass Media in the Gulf War where he concluded that the war never actually occurred, thus criticizing the coverage of the event by the media (Eliott, 2021: 355- 364). What is therefore considered as truth is in fact what becomes visible by the narrative of promotional culture. Baudrillard's theory may find application in the historical studies on the labour movement. More specifically the issue of the relevance of the concept of class in Greek social formation becomes a question of what is

said about class conflict in official texts, such as those found in the archives of trade unions, and consequently depicted in historical studies. Regarding the GSEVEE archives for instance, we know that a great part of the Confederation's archives had been destroyed during the tragic events which took place in Athens in December 1944. Therefore, we may not be able to conclude as to the precise number of women trade unionists, and thus have to rely on references in *Viotechnis* and *Mellon* or to limited references found in the general history of GSEVEE in the 20th century written by Katsoudas (2019). It may be argued that what has been characterized as class conflict is identified with trade union struggle and refers only to moments of that confrontation taking place between trade unions and employers. In a similar way feminist agitation becomes visible whenever it concerns public events i.e., meetings and demonstrations. However, we know very little about feminists' every day struggle and the extent to which ideas which were favourable towards gender equality challenged the familialist values with which Greek conservative culture had been imbued. This lack of knowledge which could be linked to the culture of silence that dominated women's everyday life leaves certain questions about their political participation unanswered: How did women, from the point of eager obedience to patriarchal values that Metaxas' regime favoured, manage to participate in anti-governmental communist groups and later on to the Resistance movement? What was the role of small enterprise apprentices in the labour agitation that took place during the German occupation? The way that the research on Greek social formation has developed in the eighties and nineties was as if women and working people had a very limited impact on Greek contentious politics. The main reason for this was that the social structure in the country was based on a great number of small enterprises where class conflict and gender antagonism had been marginalized by a strong familial bond of inter-class and inter-gender solidarity. It is important here to refer to the debate amongst political scientists, sociologists and historians such as Seferiades (1995, 1996), Pizanias (1996) and Petraki (1996) about the relevance of the concept of class in labour relations. Pizanias argued that in Greece class conflict was without relevance as analytical tool. Seferiades (1996) criticized this point vigorously referring specifically to A. Liakos' study on tobacco workers who constituted the Avant-guard of the Greek Labour movement in the inter-war era. Although Petraki (1996) offered a critique of Pizanias' argument as

well, her overall work underlined the particular patriarchal character of Greek employers as compared to their European counterparts. At the same time, Liakos (2016) and Papastefanaki (2009) tried to present evidence for the presence of a massive proletariat in Greece referring either to tobacco workers (Liakos) or female workers in the textile industry (Papastefanaki).

Pizanias' insistence on the connection between the petty bourgeois character of Greek society and the irrelevance of class in the Greek social formation may relate to the ideal of all mighty bourgeois man that Tester and Pateman focused on their critique of the concept of civil society. The erosion of the autonomous personality of workers within the small Greek family business echoes Hegel's master-slave dialectic. From this perspective, therefore, Greece may not be a particular case study which deviates from the European canon of class conflict. Where Greece's difference from other European countries lies, however, is the non-recognition of workers' rights at the shop floor which remained intact from the interwar period up to *metapolitefsi*, i.e., the period that started after the fall of the military junta and the return to democratic rule in 1974. It was precisely during the first period of *metapolitefsi*, in the mid-seventies, that a labour movement which was organized at the factories gave Greek workers the strength to fight for their rights (Koumandaraki, 1996). The particular labour movement which became known as "enterprise union movement" had been the continuation of the struggle of working people that took place in the early sixties. The fall of the military dictatorship gave workers the opportunity to become organized at the shop floor. Moreover, the enterprise union movement created the vital space necessary for the autonomous trade unions to gain legal recognition. The labour legislation the socialist government of PASOK passed in 1982 offered Greek workers for the first time the potential to be emancipated from state tutelage in the setting up of their unions. In the following years trade unionists often became the object of severe criticism by those who considered enterprise unions as agents of populist politics which marred the country's prospects for economic growth (Pappas, 2015; Sakellaropoulos, 1992: 14-16, 151). Therefore, the political enemies of populism in the end warmly applauded the end of *metapolitefsi* for it was identified with the final defeat of trade unions. In fact, the end of *metapolitefsi* may be seen as having taken place during the economic crisis of 2010- 2019 which altered dramatically the industrial relations in the country. Flexibility paved

the way for the disarticulation of industrial relations since the enforcement of workers' rights was excluded from the legislator's scope. This unhappy situation brings us again in front of what in previous years has been characterized as a particularity of Greek conservative culture and was explicitly reproduced in labour relations under the Metaxas regime. Under these circumstances the "familialism" which, according to Woodiwiss, characterized Asian social formations, may become a cultural trait that will be prevalent in contemporary Greek labour relations.

### *Trade Union Movement and Women in Small Businesses*

In the case of women employees this kind of familial solidarity was based on the informal character of women's and girls' contribution to the well-being and prosperity of small familial enterprise. It is important to note here that there were no statistical data measuring accurately the participation of women in the national labour force during the interwar era, since women's work in family business was not considered to be a proper job, but on the contrary, it was seen as a continuation of their duties as spouses. In the case of barbers, they used to hire young girls, almost children, to help them with the work. These children were apprentices rather than proper employees. Therefore, they would either be paid very little money or no money at all under the pretext that they were learning skills they could use in the future during regular employment[11]. These children could be the daughters or the nieces of the barber. The working conditions shared by barbers' assistants may be seen as quite common to women workers in that period. As P. Pizanias (1993) has shown, women working in the industry were quite young, almost children, and were paid either low wages or in "skills." This kind of female work outside the domestic sphere would be socially acceptable because it was justified as unmarried girls working to earn dowry money and acquire skills that could be useful to their husband when they would get married. That was the reason why employers did not provide apprentices with a satisfying salary. L. Papastefanaki (2009) however has shown, that not only young girls but also married women were employed in the textile industry in Piraeus after giving birth to their children. What Pizanias tried to emphasize was that the young age of female workers served as pretext for their employers to either pay them with very little money or no money at all, a situation similar with that of women working in barbers' shops.

Fessopoulos' attempts to impose the extension of working hours on Sundays may be seen as an indicator. Rest and recovery and even compensation were not an issue for barbers' apprentices.

This familial bond applied in women's participation in entrepreneurs' trade unions too. Whilst the women who were officially given leading posts in trade unions were rather few, their presence can be traced in trade unions' informal meetings and gatherings. There has been a certain degree of silence about women both as employees and trade union activists which is consistent with the traditional culture of silence and complete female withdrawal from the public sphere[12]. As the feminist movement in the years before Metaxas' regime had fought for the recognition of women's right to vote, the culture of silencing women had not been left unchallenged by the radical feminists. Radical feminists had fought persistently during those years for the legalization of women's political right and demanded that women's employment outside the domestic sphere be protected by law.

### *Woman's Work in the Inter-War Era and the Reports Written by Anna Markopoulou*

In 1928 the radical feminist journal *Woman's Struggle* (*Ho Agonas tis Gynaikas*) castigated the appalling conditions that predominated in Greek industry with women workers having to work under poor conditions of air and sanitation (*Woman's Struggle*, 1928, pp. 3-6)[13]. More specifically, they published two reports conducted by the Labour Inspector Anna Markopoulou about the working conditions in Greek factories with particular emphasis on women workers. Markopoulou had sent her reports to the Minister of National Economy expecting that he would take measures for the improvement of working conditions. According to the reports women constituted the majority of workers in industry and most of them were refugees from Asia Minor. There had been many children amongst them, who either were orphans or were working to support their brothers and sisters of younger age. The average work hours reached twelve and women were paid much less than men for a considerable amount of the time they had been working. As opposed to the men, the vast majority of women had very low levels of education with most of them being illiterate. In many factories, especially those with fewer workers the conditions of hygiene and safety were far below Markopoulou' standards. Markopoulou was particularly impressed

by the fact that workers did not have proper lunch breaks and had to work for almost 12 hours without a break for rest. Many factories had been established quite far away from workers' houses. Consequently, workers had to walk quite a long distance every day in order to reach their work place since public transport in industrial areas and in working class suburbs was not provided. Markopoulou' reports offered valuable information about the working conditions in Greek factories in the interwar era because they highlighted the contribution of women and children in the constitution of the Greek working class. Her arguments about the appalling conditions that prevailed in many factories were in fact almost identical with those expressed by the communist leader P. Pouliopoulos[14] and the reports sent by the inspector N. Saliveros to the Ministry of National Economy in August 1912.

It is worth mentioning that there were no official records about female employment during the twenties and thirties. Additionally, the work women had to offer as wives and daughters in small family firms was not considered to be a proper job and was rather seen as part of their family duties. As E. Avdela and L. Papastefanaki (2015) have also pointed out "vast numbers of women working in small family enterprises of any sort, such as shops and crafts, have been hidden till today and are impossible to estimate" (Avdela, 1988: 195). It was considered inappropriate to record any kind of women's work done inside what was thought to be the domestic sphere, a fact which agreed with the general demand for silence over women's situation in Greek small family firms.

### *The Conflict Over Women's Role and the Radical Feminists*

There was a conflict between the supporters of traditional culture arguing that women should be silent about working in family businesses and feminist groups fighting for women's right to work outside the domestic field and to participate in politics on equal terms with men. It is important to know that *Mellon* applauded warmly the so called "patriarchal ideas and principles" which prevailed in prosperous cities such as the city of Nafplion despite popular demands for "modernization" and "emancipation" that according to the newspaper' s journalists were responsible for the ongoing corruption and low morality trends that characterized Greek society[15]. The *Mellon* journalists' position against modernization and emancipation reflected, in my view, small craftsmen's hostility against the mechanization of their work.

In the case of barbers this process took the form of electric scissors, which challenged barbers' craft, and in the case of tailors, the parcellation of the work process. In both cases the gender dimension was crucial for old barbers and tailors felt that their privileged position within their profession had been challenged by women who had become the means of modernization of the labour process in both sectors. Their willingness to support Metaxas' regime is thus understandable since the dictator had promised them that the power of patriarchal relations would remain unchallenged in the work place so their particular skills would continue to reward them.

The struggle for women's emancipation which may be identified with the country's political modernization had started in the mid-twenties and was parallel with feminist struggles for the recognition of national suffrage for women[16]. Whilst the right to vote in municipal elections was recognized to all women in 1929, during the thirties women were confronted with particular governmental measures imposing serious limitations on their work outside the domestic field. These measures tried to limit women's participation in employment in the public sector. Women could only be appointed at the bottom level of state bureaucracy and their prospects for a career in the public sector were in reality nonexistent[17]. However, in March 1936 the first woman trade unionist was elected. She was El. Konstantopoulou who was elected president on the union of patisserie makers, a sector well known to be organized by left-wing activists[18]. The imposition of Metaxas' dictatorship certainly cut short all expectations for women's greater participation in politics. The conservative patriarchal culture thus apparently prevailed. During the years of German Occupation and the Civil War, women's participation in Resistance and the guerilla military groups brought the recognition of the right to vote for all women in the areas being liberated by the National Liberation Front in 1944. According to T. Vervenioti (2013), it was in the years of Occupation that women had for the first time the opportunity to participate in politics on equal terms with men: they could become National Resistance members and join the guerilla army in the mountains. A great number of women fought with the Democratic army in the Civil war and the consequent defeat of that army was experienced by them as a bitter and profound personal trauma since their plans for greater personal political autonomy had to be abandoned. It is worth mentioning here that for small entrepreneurs the struggle for the emancipation of women that took place

during the early forties was seen as a threat to the Greek family. On December 1, 1943 *Mellon* commented:

There is an attitude amongst the intellectual and cultural circles of our country that the majority of the people do not have the right to criticize their work because they have not reached the level of intellectual capacity that would allow them such right. This concerns specifically the playwrights who are eager to attack vigorously anyone who dares to oppose the way these gentlemen present the people's life in the theatre. People have the right, however, to criticize these rotten ideas which these gentlemen decorate in an artistic way aiming to poison, supposedly in the name of progress and civilization, the pure and beautiful Greek values and traditional customs, precisely those which distinguish Greeks from other people. The freedom of women has become their favorite theme, and in the name of that freedom they are keen to present on the theatrical scene harlots and biscuit thieves[19] supposedly inspired by superior ideals. They give passionate speeches full of lies and they try το lure the female masses and destroy the family.

The impact of feminism on Greek women's lives has been the subject of debate amongst historians. A. Psarra (1988) has argued that in Greece there had been various separate groups of feminists who had different ideologies and approaches towards the question of gender equality. The most prominent of them were the radicals who were accused by other feminist groups that they identified with the Liberal party of El. Venizelos. They had fought not only for the right of women to vote in the municipal elections in 1929 but also for the right of women to work outside the domestic sphere. Because of their upper-class social profile they had been accused by socialist feminists that they were coopted by the Liberal party led by El. Venizelos. Apart from them there were the socialists who were attached to socialist groups, and the communists who were linked to the Greek Communist Party. The issue of gender equality in terms of equal working conditions for both men and women was a main issue in the radical feminists' struggle (Svolou, 1928). At the same time, the communists along with the Communist party supported the demand for a socialist revolution as the necessary precondition for the recognition of gender equality (Psarra, 1988: 75). According to Psarra and Vervenioti (2010) during the inter-war era the Greek feminists had been a group of well-educated bourgeois women sharing a lifestyle that differentiated them from the women of the working class and those living in

rural areas. More importantly, the feminists did not view national suffrage for all Greek women as an issue of great priority and instead supported nationalist ideas put forward by the Greek political establishment. In this context the radical feminists' struggle for the recognition of women's right to vote in municipal elections was viewed by the other feminist groups as an attempt to favour the political rights of a privileged group of bourgeois women (Psarra, 1988: 75). However, the radical feminists' efforts for the implementation of the women's right to vote, which had been enacted into law in 1929, has been recorded in certain historical studies (Samiou, 2013; Kanner, 2015). Moreover, even if the suffrage was given to women in 1952 due to the Greek government's compliance with American standards of gender equality, it improved significantly the living conditions of Greek women in the long run, despite all the difficulties that emerged during the first years of its enforcement.

In the 1950s women's participation in the entrepreneurs' trade union movement become at last visible. The information about women trade unionists, however, remained vague. There is a mention to a particular cadre by the name of Aglaia Papaoikonomou for whom the only reference in GSEVEE archives was that she originated from the city of Volos. This lack of information should not be left unmentioned. There is a similar lack of information in the case of the trade union of barbers and hairdressers of the city of Salonica which in 1955 elected a woman, identified simply as Mrs. Daisy, without any other information. In fact, women trade unionists became visible in GSEVEE unions' catalogues only in the late sixties[20]. More specifically, the references to women as public figures grew in parallel with the modernization of political culture. A significant event in that process was the recognition of national suffrage for women in 1952. It was only after that event that women were publicly represented on equal terms with men. Henceforth the advertisements published in *Mellon* and *Viotechnis* suggest a growing respect for women as men's business partners. On November 28, 1961, however, barbers in the city of Korinthos organized a strike where both bosses and employees participated, demonstrating that the culture in which the interests of the personnel had been identified with the interests of their bosses was still powerful[21]. The reason for the strike was the barbers' demand that the taxation on electric scissors should increase because that new technology had disastrous effects on their revenues as professionals.

The solidarity between workers and bosses in this strike may be seen as an indicator as to why certain scholars of labour relations considered the application of the concept of class conflict inappropriate in the case of Greece. However, the familial air and interclass solidarity bond might cover a relationship of dependency and inequality at the expense of the so-called barber's "assistants" or "apprentices"[22]. The factor of gender differentiation between male barbers, holding the prestigious position of directors of salons, and women hairdressers working as their assistants gave this relation of unequal power both class and gender dimensions.

### *The Discourse of Human Rights and its Applications*

This paper is informed by the ongoing debate amongst scholars of human rights. Human rights are determined by A. Woodiwiss (2012) as "a legally enforceable set of expectations as to how others, most obviously the state, should behave towards rights bearers. These expectations may take the form of limitations on, and/or requirements of, the behaviour of others. Rights bearers have to be entities legally considered to possess 'personality' – that is, legally deemed to be autonomous moral agents, and therefore capable of taking decisions and accepting responsibilities, as in the case of adult persons, trade unions, corporations or states" (Woodiwiss, 2012: xi). Woodiwiss (2009) argued that different social contexts may produce different meanings for human rights. His example is the "familialism" that characterizes industrial relations in Asia and more specifically in Japan. Familialism refers to a conceptualization of workers' rights vis-à-vis their employers' power that is differentiated from Western conceptions of workers' rights. A. Pollis (1988) theorized the enforcement of human rights in Greece in an almost identical way. According to Pollis, individual rights were not highly appreciated in the culture that was dominant in Greece during the years of Metaxas' dictatorial regime. The rights of the extended family weighed more than individual liberty. Within the organic unity of the family, the rights of women, and particularly unmarried women, were systematically ignored. In that way, Greek culture was considered to be different from its Western European counterpart. Nevertheless, Pollis' account of Greek culture referred to a period when the democratic institutions of the country were suspended. Not only economic and social rights but also political rights were repressed by the Metaxas regime which was ideologically close to the Italian fascist

regime. Moreover, there is the possibility to translate legislation for human rights in order to protect the poor and needy in societies outside Western Europe in a compliance with a spirit of an authentic cosmopolitan ideology. However, Woodiwiss's account of human rights remained faithful to the thesis that these rights are organically connected with the ideal of political autonomy of the individual which was inaugurated by the French Revolution of 1789, and therefore are organically connected with democracy and the emergence of the nation-state. As G. Agamben pointed out, the legalization of human rights which presupposes national sovereignty is founded in the politics of exclusion of those who are not identified with the nation-state (Tumay & Mutlu, 2019: 253-270). More specifically, the political autonomy of the individual that the French Revolution embraced was based on the exclusion of those who Agamben described as "bare life". With that concept he referred specifically to refugees upon whom the politics of exclusion imposed by the sovereign European states stripped from all human rights entitlement (Ibid.). Under these circumstances human rights discourse may be seen as part of an imperialist ideology or what Agamben called politics of exemption. Agamben's theorization, however, is close to Woodiwiss view of human rights, which considers democratic rule a bourgeois regime that characterized Western Europe and the USA exclusively. This view attributes the uneven way in which democratic polity prevailed to a particular political culture that favored an authoritarian path to capitalist growth. Back in the nineties K. Tester (1992) in his book titled "Civil society" made mention of Carole Pateman's critique of the Hegelian concept of civil society (Tester, 1992: 144-145). Pateman argued that civil society failed to include women and members of the working class and therefore had been formulated as a closed club where only white bourgeois men were able to participate. Under these circumstances what would "human rights" mean, especially in the contested terrain of industrial relations? Hegel's analysis of the relationship between master and slave may inform sociological analysis about women and workers' participation in politics (Giouras, 2017: 36-37; Koumandaraki, 2021: 167-169). Here a reference to the concept of class conflict is relevant, for it seems to me that sociological and historical analysis of labour movements nowadays has missed the point that Agamben tried to theorize in his analysis of the politics of exemption. In other words, whilst in Europe workers have become visible and are no longer excluded from civil society (the

situation of women was similar), in regimes such as Metaxas' dictatorship, workers' rights were repressed. It was at those moments however, that the debate about human rights could become all too relevant and useful. The study of the situation of workers' rights during the interwar era in Greece which was the period when the principles of the Greek labour law had been formulated may, I think, offer food for thought about the circumstances under which these principles were founded.

## Conclusion

As a conclusion one may argue that whilst patriarchal and familialist ideas prevailed in industrial relations in Greece one should not fail to acknowledge that Greek working people often expressed their dismay about the prevalence of these ideas in Greek politics. It was precisely the feminist struggle for the women's right to vote and to work outside the home that challenged the conservative culture viewing the family as an organic unity where women's rights could be neglected. The inferior position of women at the workplace in small enterprises such as barbers' shops, indicates that we will not be able to decipher class relations in Greece without previously investigating the position of women at the workplace. The lack of open archives may be the reason why class relations have been investigated in the past without being directly connected to gender inequality. Therefore, the theories on the irrelevance of the concept of class in the case of the Greek social formation should be re-examined based on the fact that working people's rights and especially women's were systematically ignored in small businesses. Moreover, what has been presented as gendered relations of power entailed a class tension between bosses and employees despite the claims about the dominance of familial solidarity in small businesses. Yet this "familial" relationship did not prevail without resistance. Women who played a crucial role as apprentices and assistants under the authority of men became a central issue of the radical feminists' movement which demanded the legitimation of women's political rights and the recognition of their right to work outside the domestic field. Moreover, what was seen as a Greek particularity in industrial relations, that is, the employees' limited resistance to their employers' power was not in fact an element that differentiated Greek traditional culture from its Western European counterpart.

More importantly it should not be seen as an almost "natural" characteristic of Greek industrial relations that would remain unchangeable in the long run. Here one should re-examine the impact of feminist ideas on Greek women and re-consider the influence of feminism in forming the left-wing political agenda both during the interwar and post-WWII decades. For it seems to me that whilst the feminist movement was seen by historians as a movement identified with a few, highly educated bourgeois women, the importance of patriarchal ideas in Greek culture was overemphasized to such an extent that the concept of social change itself became questionable.

## Notes

1. My research on *Viotechnis* and *Mellon* was based in the archives of the Hellenic Confederation of Professionals Craftsmen and Merchants (GSEVEE).
2. In September 1937 *Viotechnis* informed his readers that Mr Dimitratos, who was the "Guardian of small enterprises' interests and precious assistant of the National Governor, took the initiative to unify the class of small shopkeepers, to organize craftsmen and to solve within a month all their problems". The article ended by saying that "New Routs of Progress are now designed for the craftsmen of our country. The latter have been liberated from all the handicaps that enslaved her in the past and under the guidance of the National Government will proceed to the tracks of prosperity" (*Viotechnis*, 10th of September 1937: 1).
3. On 1st of August 1938 Viotechnis celebrated the anniversary of Metaxas' regime by citing in the front page a picture of the dictator with the comment: "Greek people participating wholeheartedly to the celebrations of 4th of August, express their great gratitude towards the great Creator of the state of the 4th of August, and promise to work with all their potentials and to be united in the struggle for the construction of the 3rd Greek Civilization" (Viotechnis, 1st of August 1938:1).
4. More specifically, on 16th of June 1938 the Barber Dimitris Fessopoulos published in Viotechnis a letter asking Demetratos who was the Minister of Labour to take action for the extension of work days on Sundays. Fessopoulos argued that this measure would save barbers' shops from shutting down since they would be able to serve their clients in their day off. Besides this measure had already been applied to similar shops to the barbers' such as bakeries and patisseries. In a second letter written by Fessopoulos and published in Viotechnis on 16th of August of the same year, the author replied to his colleagues who had urged to criticize him by arguing that although humanistic values had dominated in

barbers' profession and had imposed the day off work on Sundays, now the barbers had to do their best to save their shops. In addition, Fessopoulos made a particular reference to the electric scissors which might challenge barber's craft. The fact that Viotechnis offered the opportunity to Fessopoulos to develop his argument may be seen as an indicator that the extension of work on Sundays was an important issue amongst barbers.

5. Koniordos (2001) specifically has focused on the division of labour between men and women in small shops wherein all the craftsmen were in principle said to be men, since women always hold an inferior position in the hierarchy of labour there (Koniordos, 2001: 7).
6. See Bakalaki, A. (1986).
7. Fessopoulos in a letter published in Viotechnis on 3rd of March 1938 wrote that "the hairdresser's craft is at a high social level since it requires artistic talent and style". The artistic skills that crafts like that of the barber and the tailor required, presupposed a great amount of time dedicated to the particular crafts. According to Evangelos Mazis president of Tailors' trade unions women lacked by nature the artistic talent required by the tailor's craft. Mazis particularly directed his criticism against tailors' schools which had increased in numbers at that time and had offered young girls the opportunity to be taught the tailor's craft (Viotechnis, 16th of October 1940: 1-3). According to him style and artistic talent was a natural gift shared exclusively by men and could not be aquired through education and job experience. Therefore, according to him a woman could not be able to be a successful tailor.
8. The tailors' school master Aggeliki Kafantari advertised her school claiming that "the strict family values which are the rule in our boarding school and the education we offer are equivalent to those which govern special schools in Paris. Parents and governors you are the most welcome to visit our school", (*Viotechnis*, 1st of September 1939: 3).
9. The quality and the level of women's mental capacity seems to be an issue of a great discussion at that era. An indicator of that fact was the advertisement of electric lamps LUX showing the head of a young women being lightened by a lamp LUX. It seems therefore that there was the belief that technology could contribute to the increase of the level of women's mental capacity.
10. In fact, in a photo of a particular official social gathering presented by Viotechnis on 1939, the only woman that was named was the wife of the Minister of Labour Aristeidis Dimitratos, a fact which, I think, indicates that Dimitratos as a person and his family consequently, enjoyed great respect amongst craftsmen and small entrepreneurs' confederation.

11. During fifties Mellon and Viotechnis often published articles about craftsmen's dismay against the level of their contribution to the workers' insurance. In 1961 the small entrepreneurs put pressure to the government to decrease their contribution in their disciples' insurance benefits. (Viotechnis, 17th of February 1961: 1).
12. I think it is symptomatic of that particular culture of silence a particular phrase that the highly appreciated scholar of Law and professor in the Law School of University of Athens Nikolaos Saripolos has written: "The woman for whom there has been talk about in public, is a miserable one!" (Vasileiadou, 2018: 113).
13. My research on Woman's Struggle issues, was based on the archives of the Centre for Gender Studies at Panteion University.
14. Pandelis Pouliopoulos, who had been General Secretary of the Greek Communist Party in the years of 1924 -1926 then became the leader of the Trotskyist group "Spartacus" and was executed by the Italian army as a member of the Greek resistance and a communist agitator during Greece's German Occupation. He had described extensively in his books the appalling conditions of work in Greek factories in interwar era, with specific reference to workers of Asia Minor refugee origin. He has written: "In big textile factories, tapestries, chemicals… in Athens, Faliro, Pireaus, Salonica, Volos… thousands of children of refugee origin have been stacked up and squeezed dry for more than 10 hours and 10 drachmas or less pay for the day (Pouliopoulos, 1992: 60). Pouliopoulos' bleak description may not be considered as judgmental and therefore caused by his political convictions. The report written of the Inspector on Employment N. Saliveros on August 1912 had shared with him an almost identical with him view of those working conditions during the previous years. (Leon, 1978: 12-13). It is important here that we have three separate narrations about the working conditions in Greek factories, which although have 10 years of distance between them described the situation in the factories almost identically.
15. I particularly refer to the article of Mellon "Nafplion: the first historical capital of Greece with morals of old aristocracy and a vigorous economic life", cited in *Mellon,* 13th of May 1935, p.1.

16 See Koumandaraki, A. (2019).

17. This was particularly the case of women employees in the Public Institution of National Statistics who according to the radical feminists became the victims of an overt merciless persecution aiming to their retirement. According the Woman's Struggle (Issue 15/4/1930) a feminist committee wherein highly profiled feminist activists such as M. Svolou participated, had submitted an official complaint to the Minister of National Economy concerning the dismissal of

44 women previously working in the Public Institution of National Statistics (Koumandaraki, 2019).

18. See Paloukis, K. (2020).
19. Biscuit thieves who were called in Greek "paximadokleftres" or "paximades" was a term referring to those women who wandered in the coffee shops and become thus suspected of stealing biscuits from the tables where the clients had been drinking their coffee. *Paximadokleftres* was a term that was frequently used during thirties and forties for women who walked in the streets of the cities without being in the company of their father or husband as they should have been according to the patriarchal ideals which prevailed in the country at that time.
20. See Koumandaraki, A. (2019).
21. Information for the strike was given by *Mellon* of 1st of January 1961, p. 31.
22. On 12th of January 1962 the trade union of the owners of patisserie shops, following Fessopoulos' initiative during the thirties, sent *Viotechnis* a letter defending the opening of their shops on Sundays which according to them would be feasible thanks to the extreme effort made by themselves and their family (Viotechnis, 12th of January 1962, p.1).

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**Class and Status**
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# Bourgeoisie in the Modern World: Social Polarization or Social Balance?

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## Abstract

Bourgeoisie is a rather disappeared concept, from the last decade of 20th century, and without real participation in the measurable social groups' distribution, in 21st century. What's going on? Is there something like that? Is there any capitalism without capitalists or stock holders? Nobody suggests such an idea, but we can watch an absolute silence for the bourgeoisie as a social class or stratum. Some recent theoretical approaches produce analyses either for a hybrid upper class either for new elites or for broaden unities which "prevail" in society. Nevertheless, all the clues show an interesting situation, with extremely few people been here as entrepreneurs, as employers with enough personnel for the accumulation of capital and probably as rich people. The polarization is obvious in the contemporary society, worldwide, according to the criteria of the classical theories. At the same period, the recent theories shift their focus on a new social class (with a known "old" nomination), namely the "middle class". This article is going, to examine the notions, the theoretical approaches and the measurable realities, with three targets: a) The definition of bourgeoisie, b) the evolution of bourgeoisie during 21st century, and c) the intensity of social polarization in modern society.

**Keywords:** *bourgeoisie, social classes or strata, social polarization*

## Introduction: The indices of a charming absence

It is relatively easy to identify capitalists, as liberal and radical theories tend to converge, on the qualitative terms of social positions, while differences of theory are, at worst case, the result of alternative terminology. It is more difficult to define the "bourgeois" (and the bourgeoisie) because the original concept, which still creates indirect discourse and obligate to basically ideological references, confuses their social situation with the "co-existence" of several social groups in cities, from the medieval era to the integrated capitalist phase (Weber, 2009: 315). The "bourgeoisie" is thus a difficult concept, while the capitalist class is a more self-evident social category. Even more, it is a part of the intense theoretical challenges (like an underground noise) the direct association of the "bourgeoisie" with the capitalist class.

Something strange happens, also, in the era of the creation of relatively wider managerial strata, in which certain categories enjoy prestige, high and some of them very high remuneration (in the form of a salary). These strata, according to some conceptions, could have been part of the bourgeoisie or the upper class (Burnham, 1941). After this estimation, a strange and seemingly incoherent theoretical rollercoaster began.

At first, the reality of some or few well-paid salaried people clouded the picture for wage labor as a whole. When a period of time passed and it became clear that the managers were relatively few (in relation to the groups of employees in general) and their proportions in employment were limited (Wright-Mills, 1969: 64), an even larger discussion began. The well-known theories of social mobility made and make a real struggle to show that capitalist society enables members of the lower classes and especially of the middle classes to redeem, in the fields of material interests and prestige, the positive expresses of relative or absolute professional success (Sorokin, 1959: 23-32, 99, 103-106), namely joining a position near to the bourgeoisie, without actually being capitalists, such as top managers or the broader middle management groups (supervisors, consultants, high salaried clerks, etc.). One had only to have the right qualifications, the appropriate effort for productivity, and the same person could rise up the social ladder (Davis & Moore, 1945), very close to a bourgeois or to something like the bourgeois and a member of the bourgeoisie.

The period in which the conditions of production have changed and the Fordism-Taylorism model was transformed, then the restructuring

of the sizes of the real managerial groups became clear and this fact was accompanied by the shrinking of their social power (Lytras, 2016: 69-74, 143-150). In the following phases, with the crystallization of the process, the "multidimensional character of capital" (Bourdieu, 1985) was invented and mostly adopted (with a hasty "reading" of an essentially neo-Weberian understanding of the types of power).

New and subjectively considered compositions (Savage et al., 2013), for the effects of the economic (meaning the income, the savings, and the valuation of the owned house), the "social" and the "cultural capital", create new "elites" (in an arbitrary composition with the old ones), laterally reconstruct the upper classes, in societies in which the classes are illegible and almost "useless" "theoretical sets" (meaning by the last reference, that in theory, they are of very low utility or the classes are estimated to be outside reality). A series of scientific careers have been built, or are attempted to be built, essentially on the concealment and not on the emergence of the bourgeoisie and, within it, the purest concept, which regards the capitalists. Why is this happening?

A short answer (also serves us as a working hypothesis) is that capitalists today are extraordinarily powerful, but also, unrealistically, few in relation to the number of people inhabiting the planet (Lytras, 2020: 49-50). Their very minimal representation in population and employment (with the possibility that the "normal people" will never meet them) suggests that it is an intellectual difficulty to acknowledge their authentic existence (so much so, that many almost feel like there is an oblique acknowledgment of revival of nobility).

How did these few powerful people acquire their immeasurable wealth? A short answer is that "most" of these few obtained the basis of their wealth from inheritance and other economic results based on affinity. There is a fraction of this wealthy and small minority which has taken advantage of some combination of personal skills, luck, speculative investments by third parties in their own business ventures, and the process of business restructuring (i.e., mergers, strategic alliances, or internal restructurings with capital increase etc.).[1]

What are capitalists in terms of employment? The answer is easy and simple: This infinitesimal minority consists, in the vast majority of its members, of employers, in all sectors of production (Smith, 1887: 50-51). There

are clearly certain categories, even more limited, which earn money without being, immediately, members of the employers' groups. It is, however, a rather rare phenomenon.

A part of the capitalists comes from (or formally communicates with) the upper management echelons of large or very large enterprises. These groups gained an access to the capital or to the assets of the businesses (Dumenil & Levy, 2011). They connect with capitalists' properties because they base their income primarily on the returns of that capital rather than on their nominal status or the range of remuneration from the managerial work itself (namely, their salary).

In cases where the typically displayed managerial salaries appear speculative, two main alternative events occur: The first is the possibility that the owners of the property are presented as managers. The second possibility represents the fact that the huge salaries are concentrated combinations of real managerial wages and share payments of the returns (the yields or the direct profits) of capital (in some financial years), precisely because the top managers contributed to its extraordinary profitability. In both cases it is the possession or the relation with the performance of capital that determines their position, but is not the formal communication with their apparent dependent labor and wage.

How are capitalist profits created? The estimation is too easy and can, without much effort for the clear thinking, if we step on both the fundamental liberal economic thought and Marxism. Human labor creates the returns of capital, namely the profits of capitalists, of any special form and any sector of production (Smith, 1887: 48-49, 50-51). More precisely, wage laborers create all the capitalists' profits, completely, absolutely, and unequivocally. In the fundamental liberal thought, wage workers, with the result of their labor, replace and therefore return to the stock holders, the total value of the means of subsistence, of the means of production, of the raw materials and of every material or immaterial dimension of investment, while together they create the total profits. In Marxist perception (Marx, 1969: 20-21), one part of human labor is paid labor, while another part of human labor is unpaid labor, and from this unpaid labor comes the totality of the capitalists' profit (Marx). In Marxist analysis there is indeed a relative restraint on the appropriation of surplus value (the value of unpaid labor) by capitalists. They appropriate only the industrial or the commercial profit,

while interest and ground-rent (that is, the two other parts of the composition included in surplus value) are considered to be potentially paid to the banker (or "usurer") and to the landlord.

In a "neutral" formulation of both the abovementioned approaches, all the wealth appropriated, used and owned by the few rich capitalists comes from the value of the labor of all people, who work as wage earners. It is interesting that, for the fundamental theoretical understandings (liberal and radical), all this wealth is acquired by exclusively legal means, and it is not, in any case, the result of illegal, delinquent or deviant actions. The latter does not declares that these actions do not exist. It declares, however, that the production, appropriation, and possession of great wealth (by the processes shortly described) by capitalists is, basically, carried out in a lawful manner and by legitimate means. The process thus expresses a perfectly legal mechanism, which simultaneously and relentlessly creates wealth for a minority and poverty for a vast majority of people. The poverty is the unavoidable result of industrious labor for a portion of population and is not the result of unemployment of the workers (or the result of the underemployment of human labor, generally).

## Bourgeoisie: *what does it mean in theory?*

### *A. Smith for Bourgeoisie*

Table 1. *Bourgeoisie According to A. Smith's Political Economy*

| Theory or Analyst | Bourgeoisie | Criteria |
|---|---|---|
| A. Smith | *Stock Holders [with Incomes from Profits]* | Fundamental Incomes or a Synthesis of Incomes |

According to A. Smith's analysis (Smith, 1887: 50-51), we can distinguish two potential groups to be recognized as alternative categories of the upper class, namely the landlords with income derived from ground-rents and the capitalists with income derived from profits. The landlords are those groups of the very few who have rights over the land. Their rights derive from the period of the disintegration of feudalism (and the subsequent period of transformations) and their returns are increased, particularly, by the process of enclosures.[2]

The capitalists (the stock holders) are the second class, identified and highlighted by A. Smith. They are entrepreneurs, acting as employers. Their income comes from the profits of capital. They are, at the time of writing, the leading agents of capitalist production, and their action in the market economy portends the rapid and innovative expansion of personal and social wealth.

They play also the role of traders, but their commercial status derives from their producer status. They do not follow the older model of the middleman (whether he gave orders or he was a customer or generally a trader) between the producer and the consumer. They are traders because they are producers and, because of this communication (they independently trade their products of their production) with transactions, they contribute to the systematic feedback of the markets with new commodities (for which they remobilize the production, hire workers and mobilize other agents of market), with more transactions and these entail the continuous increase of national wealth (Ibid: 438).

The profits are the incomes of capitalists, but they do not, exactly, create them. Capitalists are, firstly and foremost, owners of accumulated capital. Capital utilization requires the transformation of the capitalist into an employer. Capitalists hire "hardworking" workers as wage earners. Initially (in advance), they pay workers their wages, for the period of their commitment. Together they pre-pay the cost of the means of production (tools and later more systematically machines), the cost of raw materials and other necessary things for production (land, buildings, patents, etc.). They expect that the value of the products, which they will sell in the market, will be greater than the total advance of their expenses (for wages, tools, raw materials, investments in land and or buildings, etc.). The positive difference, between expenses and income of the employer action of the capitalists, creates their profits (Ibid: 48-49).[3]

Capitalists are, for A. Smith, the businessmen-employers, who operate as producers-traders of material and immaterial goods, and draw their profits, exclusively, from the value created by wage-workers (over their wages and other prepaid production costs). They are the ones who have the initiative in the production of wealth because, without this initiative and the necessary human labor, they could not utilize their capital and achieve its profitable increase. A. Smith recognizes the great economic and social inequalities,

under the described circumstances. He writes: "Wherever there is great property, there is great inequality. For one very rich man, there must be at least five hundred poor, and the affluence of the few supposes the indigence of the many" (Smith, 1922: 203).[4]

## *Bourgeoisie according classical Marxism*

Table 2. *Bourgeoisie According to Classical Marxism*

| Theory or Analyst | Bourgeoisie | Criteria |
|---|---|---|
| Classical Marxism | *Capitalists*<br>*Owners of the means of profits*<br>*[with Incomes from Surplus-Value (Profits)]*<br>*Ruling Class* | Exploitation<br>[Collective Production of Surplus-Value (from wage-earners) and<br>Individual Appropriation (from the Capitalists) |

In the phase of integrated capitalism (namely at the last period of the industrial revolution), for classical Marxism, entrepreneurs are mainly the capitalists (owners of the means of production) who hold large capitals, use and exploit large masses of wage-laborers as a collective force under a continuously broadening division of labor and the larger mechanization of production (Marx, 2000). This is the core of the corpus of entrepreneurship, with the complimentary categories of bankers, brokers and merchants, who have tight relations with the industrial capital.

The incomes of capitalists come straightly from profits, which are been produced as the surplus-labor of wage earners. This approach comes from a critical revision of the A. Smith's initial analysis. On this issue, K. Marx focuses on the opposite class interests, within the capitalist system.

K. Marx emphasizes on the creation of surplus-labor by wage-workers, so of the unpaid work, which is reflected in a new mental construction, namely to the surplus-value. He notes that "the *value or price of the labouring power* takes the semblance of the *price or value of labour itself*, although, strictly speaking, value and price of labour are senseless terms" and "although one part only of the workman's daily labour is *paid*, while the other part is *unpaid*, and while that unpaid or surplus labour constitutes exactly the fund out of which *surplus value* or *profit* is formed, it seems as if the aggregate labour was paid labour" (Marx, 1969: 20-21). The surplus-value is the direct indication of exploitation.

So, the surplus-value is an integral part of the value and, therefore, the exchange price of commodities, from which the capitalist profit is becoming visible. Nevertheless, he suggests that the capitalists do not appropriate the entire surplus-value, but only a part of it. Surplus-value represents the sum of the ground-rent, the interest and the industrial or commercial profit. The industrial profit is determined, when the sum of the ground rent and the interest is removed from surplus-value (ibid: 21-22). Without any doubt in Marxism, the (collective) production and the (individual) appropriation of surplus value declares firmly the inverse relationship between profit and wage (Marx, 2000: 286).

The capitalists are the members of the upper and dominant class of the capitalist system (Marx & Engels, 2000: 246-247, 250). As a dominant class they govern the capitalist state, which looks like a dictatorship of a minority. Classical Marxism supposes that the state functions somehow as the political party of the capitalist class, as a whole (ibid: 247). The capitalists are therefore owners of capital (or stock holders), owners of the means (on a large scale) of production, entrepreneurs-employers, exploiters (Marx, 2000: 293-294), and members of a dominant class.

## *Bourgeoisie according M. Weber and W. Sombart*

Table 3. *Bourgeoisie for M. Weber and W. Sombart*

| Theory or Analyst | Bourgeoisie | Criteria |
|---|---|---|
| M. Weber | *Entrepreneurs [Owners of Enterprises for-Profit* (industrialists, merchants, landowners-businessmen, ship-owners bankers, brokers, professionals with high qualifications and rank)*] or Top Managers* | Positive or Negative Privilege of doing business |
| W. Sombart | *New Type of Bourgeois - Entrepreneurs [Owners - Employers of Large Enterprises]* | Agents of Capitalist Spirit |

M. Weber declares that with the notion of bourgeoisie "finally, in the class term, we understand those strata, which are drawn together in contrast with the bureaucracy or the proletariat and any other outside their circle as 'persons of property and education', entrepreneurs, recipients of funded incomes, and in general all the persons of academic culture, a certain class standard of living, and a certain social prestige" (Weber, 2009: 315).[5] Then in *Economy and Society* M. Weber makes a notable description which is referred to the structure of classes. This description meets either the positive or the negative exercise of the privilege of doing business. In the upper class and privileged groups are the industrialists, the merchants, the landowners-businessmen, the ship-owners, the bankers, the brokers, the professionals with high qualifications arising from education and the employees based on monopoly of a particular skill. The lower and underprivileged class includes skilled, semi-skilled and unskilled workers. The interim class of this classification is sorted to farmers, artisans, some independent professionals and some employees (Weber, 1978, Vol. I: 303-305).

The entrepreneurs of M. Weber are the owners of every large profitable enterprise. His emphasis on securities' market gives to the observers the real sense of the concrete status. The large enterprise as an impersonal institution flourishes in the environment of free labor market, in which the workers are pushed by the whip of hunger and are competed to each other, to be hired for a wage. Therefore the entrepreneurs are mainly the individuals or the groups of owners of such a kind of enterprise, who are employers of a large mass of workers (Weber, 2009: 275-278). There are of course the merchants, the brokers, the landowners, as groups of the rest upper class. The high qualified wage workers are rather the representatives of top management in large enterprises. The farmers, the artisans, and the independent professionals are the representatives of small employers or own-account workers are present in his analysis.

W. Sombart suggests that capitalism is the economy of the acquisition and profitability (Sombart, 1998: 20). The organization of capitalism is considered that has been constructed as a product of a random evolutionary procedure during the pre-capitalist period of societies (ibid: 19). W. Sombart attaches great importance to the subjective and particular the spiritual factors for the formation of capitalist system. The entrepreneur and the capitalist spirit gave birth to capitalism (ibid: 348-350). The author, of course,

accepts that the progress of capitalism shapes the capitalist spirit itself, too (ibid: 350). W. Sombart surely creates an analysis which has analogies with approaches of M. Weber's. There are definitely two critical differences. W. Sombart estimates for the issue of the formation of capitalist spirit and thinks that the general spirit of religiosity had grown by Catholicism and recognizes the very positive contribution of Jews to the capitalist reality (Sombart, 2001). In contrary, M. Weber (Weber, 2009: 360) suggests that Jews haven't had any real involvement in the formation of rational capitalism.

The new type of bourgeois (Sombart, 1998: 167-172) is the modern economic human and represents characteristics of the modulated capitalism. The capitalist is speedy and resourceful, therefore a entrepreneur, who seeks with passion to increase his wealth. He admires quantitative assessment through measurable methods. The major goals of the bourgeois are to care much for his inventions, originality, smaller innovations and the changes in fashion. The motivation to put obstacles to his competitors is linked to the logic of personal hegemony and the faith that technological innovation could subjugate the natural forces (ibid: 180-183).There is a passionate desire for the expansion of sales, the access to new markets and to the new masses of consumers. He likes much and promotes the pretentious marketing techniques such as advertising. The new type of bourgeois builds up, continuously new tactics of exclusion and destruction of its competitors. The ruthless speculation prevails absolutely in economic life (ibid: 186-189). The main bourgeois' qualities of industrious energy, as the trend to saving, the honesty and solvency differ from the previous and obvious virtues and they become integral parts of the functioning of business and finance, especially for large enterprises. The attitude of entrepreneurs, except for the small and medium, is rather dissociated, in daily life, from the standards and the liabilities of the business organization (ibid: 190-193).

According to W. Sombart' approach the entrepreneurs of his time are the owners of large enterprises, which are very well organized with the instrument of a strong and relatively autonomous bureaucracy (ibid: 363-364). Nevertheless, there are the small or medium entrepreneurs as residues of stronger past figures, but not as representatives of the dominant figure within the modern "bourgeoisie".

## *Bourgeoisie and elite according Th. Veblen and V. Pareto*

**Table 4.** *Bourgeoisie and elite according Th. Veblen and V. Pareto*

| Theory or Analyst | Bourgeoisie/elite | Criteria |
|---|---|---|
| Th. Veblen | *Leisure Class-Dominant Class*<br>During Capitalism:<br>*Industrialist-Capitalist* | Private Property and<br>Exemption from Productive Employment |
| V. Pareto | [Political Power]<br>*Elites*<br>1) "Foxes" (democrats)<br><br>2) "Lions" (conservatives-autocrats)<br><br>---------- | Residues<br><br>1) (Residue of the) Instinct of Combinations<br>2) (Residue of the) Persistence of Aggregation<br>---------- |
| | *Economic Elites*<br>1) Speculators-Entrepreneurs<br><br>2) "Rentiers"-Possessors of Property | 1) (Residue of the) Instinct of Combinations<br>2) (Residue of the) Persistence of Aggregation |

The leisure class, according Th. Veblen (1982) is the dominant class of every society. The main characteristic is its exemption from productive employment, and this exemption is the certification and economic expression of their higher rank (Veblen, 1982: 27). This exemption does not mean the absolute laziness, but is accompanied by activities, which do not have a direct productive content. Analogous activities are governance, war, participating in religious rites, and sports (ibid: 28), with conspicuous consumption, conservatism (as it protects its social interests), propensity for gambling (with all possible games), and the devout observances (ibid: 197-205, 281-288). Property in its turn creates the framework for the development of competition, for the acquisition of greater wealth, which concerns the possession and use of goods. The struggle and competition for property is attributed to the envious discrimination that accompanies the acquisition of wealth, but not from the requirement to meet needs. Property is like a trophy. Trophy holders stand out from the rest of the community regardless of the actual value of the trophy. The consolidation of individual property contributes to a qualitative change and the accumulation of wealth or property becomes an indicator of power and success. The possession of wealth turns into a praiseworthy event and brings honor and recognition to its possessor. Success is

assured by the conspicuous consumption and the envious comparison with others. Attestation is evidenced by the demonstration of wealth (ibid: 50-56).

According Th. Veblen, the industrialist-capitalist fully reproduces the characteristics of the leisure class of the societies of the past. The reproduction of the archetype of barbarism and predatoriness can also be seen in this type of ruling class. A very similar characteristic to the old leisure class, for the new type's culture is the reproduction of competition, which is only intended to emphasize special abilities and social differences, with those who do not show corresponding achievements. The industrialist-capitalist, recognized by Th. Veblen, as a crafty (than a clever) man and the basis of his power is more money power and less the occupation in the industry itself. He adds for the (contemporary in the age of writing) industrialist-capitalist, that the professions of the leisure class in modern industry keep alive some of the predatory inclinations (ibid: 214, 222-224).

The renewal of the industrial-capitalist version of the leisure classes is ensured by people who have similar predispositions and are driven to similar manifestations of social behavior. The leisure class fills its ranks (at the end of the 19th century) with those who have succeeded financially and are distinguished by certain abilities to express the predatory characteristics. The process of joining the leisure class takes place as long as newcomers succeed in monetary pursuits. Money pursuits, roughly, function as fields of predatory testing in order to join the upper class the most suitable people, for its works and characteristics (ibid: 225).

The upper class according to V. Pareto includes two groups, the governmental elite and the non-governmental elite. The elite, a minority of society, is destined to exercise power, exclusively. The rotation of elites in governance, namely their circulation, is characteristic of power systems (Pareto, 2003: 1445-1447). The alternation is essentially determined by the characteristics of the two elites. The two elites are identified by V. Pareto, based on residual analysis. The first elite (it corresponds to the foxes of N. Machiavelli) is characterized by the residue of the instinct of combinations. They are flexible, nimble (and rather cunning), and they create new opportunities to the people. They push for the economic expansion and progress, but often their actions tend towards deception. The negative aspects of their action include corruption and for this reason ultimately explain their inability to govern, which leads to the loss of power. The second elite (it

corresponds to N. Machiavelli's lions) is the group, which is characterized by the residue of persistence of aggregates. It is defined by conservatism, the tendency to preserve tradition and customs, honesty, but also authoritarianism, with the using of violent means to enforce its choices. The absolute way of exercising power, the lack of flexibility and the use of violent means delegitimizes the rule of the second elite and brings the first elite back to power (ibid: 1449-1450, 1561-1567, 1602-1606, 1608-1611).

The two economic elites are the speculators or those who could be more broadly characterized as entrepreneurs and the "rentiers" who are possessors of property and income earners. Speculators-entrepreneurs are distinguished from the rest by the residues of combinations (they are somehow the foxes of the economic activities). "Rentiers" are the possessors of property (land, real estate, bank savings etc.) and income earners. They are those who aim to preserve what they have acquired and to make stable investments. They are characterized by the residue of the persistence of aggregates (they are therefore the lions of the economy). Both categories play a special role in the dynamics of economic equilibrium. Speculators are prone to risk, making innovations, using cunning and sometimes dishonest means, which, however, contribute to the expansion of wealth and to a certain distribution to people who take advantage of these opportunities. "Rentiers", relying on fixed investments in real estate, land or savings, have conservative and inflexible attitude in their economic action. However, their continued dominance in economic activity would lead to the unilateral concentration of wealth. The fact that the two categories dominate alternately provides the possibility for the balance between expansion and stability (ibid: 1588-1590).

The Pareto's approach probably determinate both the abovementioned categories as the synonymous to the economic upper class, as they are a transformed and contradictory set (or as a unity with contradictions) of the modern capitalist class and the "residues" (or the fossils) of the old aristocracy (if they are actually a distinguished group).

### *Bourgeoisie as elite, according C. Wright Mills*

The "power elite" (the term of the C. Wright Mills' title of the book), in my opinion, is a euphemistic designation, with mental loans from V. Pareto's approach on the upper class (Mills, 1956). It is a euphemistic designation, because it does not retain any of the components of that V. Pareto's elite. The

"power elite" does not have any biological, instinctual, non-logical, feudal or aristocratic origin. In the power elite of C. Wright Mills, "the circulation" of the elites (governmental and non-governmental) of V. Pareto's analysis is not observed. There is an evolution and individual reconstitution of the groups that make up the power elite. The intelligent description, despite the filtered discourse detours and intellectual complications, leaves no doubt that the three main actors of the power elite are not equally powerful.

Table 5 .*The power elite*

| Theory or Analyst | Bourgeoisie as an elite | Criteria |
|---|---|---|
| C. Wright Mills | *Power Elite*<br>1) The very Rich Entrepreneurs, together with the Managers of large enterprises<br>2) The Politicians<br>3) The Higher Military Officers | -They are a social unity<br>-They take and impose on society the crucial centralized decisions (the major economic decisions, the decisions on national and international issues and the decisions on war or peace)<br>-They have a common social background and common interests |

The actors are the very rich, together with the managers of large enterprises, the politicians and their staffs and finally the top US military officials (Mills, 1956: 7). If we give the proper importance to what is specifically said by C. Wright Mills, the managers do not have, in essence, different interests from the owners and they basically have the same social origin from the business groups and the very rich (ibid: 120-129). The same is the case with US political staff (until 1956), who very widely originate from or communicate, immediately, with the very rich and their businesses (ibid: 231-235). It is not believable, after the above observations, that the military personnel (ibid: 198-224) and their highly necessary participation in crucial decisions could make them autonomous from the agents of economic power (who aim at state contracts and financial benefits from international involvements) and political power (while it is clearly indicated that they are not alone, but, relatively, autonomous).

In C. Wright Mills' opinion, elite dominates in the contemporary American society. The groups of power elite have the means of power. They take and impose on society the crucial centralized decisions, on all major issues (the major economic decisions, the decisions on national and inter-

national issues and the decisions on war or peace). For C. Wright Mills the three categories are really and all together a single unity. That means the persons are conscious members of the power elite. They possess a similar psychology, which, at the same time, expresses a sense of superiority and a detachment from the masses. They know and recognize each other, as they follow similar (not necessarily identical) courses of personal development and advancement in professional, economic and political life (interconnection of families, participation in the church, inclusion in schools and universities, etc.). They follow a similar or even common way of social life (formation of social networks, associations and events of a similar nature). They communicate and consciously co-decide, whenever necessary. They have a full sense of the need for cooperation, coordination and mutual support. Otherwise, they cannot realize either their individual interests or their common goals (ibid: 269-297).

The participants in the power elite have the ability to manage the mass media, which in the American case are private, and to impose, at their will or according to their choices, their views to the masses, namely to the middle class, and to the lower classes. The latter, as they are unable to assess the validity and the essence of the messages, basically, consume information uncritically and passively accept the choices of the power elite (ibid: 71-93, 298-324). They reproduce and consume mass culture, but also preserve the conservatism. Conservatism is supposed to preserve social values, as well as a sense of community unity (ibid: 325-342). At the same time, the hypocritical conservatism coexists with inherent corruption in the organization of the social system (ibid: 343-361), which is unavoidable (with intertwining interests, opaque lobbying, bribery of public officials and "white collar" crimes).

### *Bourgeoisie as a class amalgamation, according Dumenil and Levy*

G. Dumenil and D. Levy (2011) write and publish their book, after the crisis of 2007-2008. They record the events, during the intervening thirty years or so, in world capitalism. They look in particular at developments in large and very large firms and try to systematize shifts in their returns. In this way they realize, that a greater part, compared to the past, of the financial returns and profits come from the transactions on the international stock markets. In similar actions, the new type of top executives of companies, who in particular have skills in managing financial transactions, are activat-

ed. On this basis, the authors consider, a significant change is taking place in the correlations of social forces and therefore in the class structure, the correlations of classes and the character of class divisions.

Table 6. *Bourgeoisie as a Hybrid Class*

| Theory or Analyst | Bourgeoisie | Criteria |
|---|---|---|
| G. Dumenil and D. Levy | *Hybrid Class*<br>-Amalgamation of<br>Capitalists and Top Managers | -Amalgamation<br>of Ownership<br>and Managerial Control of Capital<br><br>-Synthesis<br>of Profits, Salaries, and<br>Securities' Yields |

Their analysis finds a critical variation in the composition and functioning of management teams. Middle management teams are downgraded, in terms of their role and financially. Top managers are empowered as they manage the corporate assets, especially those in the form of securities (Dumenil and Levy, 2011: 84-85). Top managers are paid very high sums, which are combinations of high salaries and returns on shares from the funds under management of large or very large for-profit companies. The financial situation of the capitalist class and top managers is improving (ibid: 46-52), until the recent financial crisis (2007-2008).

G. Dumenil and D. Levy foresee the amalgamation of top managers and the capitalist class, in a new hybrid class. Salaried managers earn their income from both wages and capital gains, which have been distributed (to these managers) and are now partly owned by them. The members of the capitalist families, in addition to and apart from their wide returns, which includes the exploitation of their substantial portfolio yields, also take incomes from their participation in the highest (typically, salaried) managerial hierarchies (ibid: 85-87).

According to the assessment of the present analysis, the new hybrid upper class signifies the incorporation of top managerial positions into the capitalist class. This finding could mean both the acquisition of significant capital by the top managers and therefore their upward social mobility in the capitalist class or the (re)activation of members of the capitalist class in a day-to-day business operation, beyond the ongoing participation (from

the past) in the ownership and the general strategic planning. An analogous interpretation rationalizes both the renewal of the capitalist class and the return of the already established capitalist groups, to the very practical management of business function. Even if in the past they appeared, symbolically, as a "leisure class", today they are an integral part of the day-to-day leadership of very large enterprises.

## *The disappearing of bourgeoisie, according Savage et al.*

Table 7. *The absence of Bourgeoisie*

| Theory or Analyst | An "Elite" without Bourgeoisie | Criteria |
|---|---|---|
| Savage et al. | An "Elite" as an Upper Class without a Class of Capitalists (But with overrepresentation of the chief executive officers, IT and telecommunications directors, functional managers and directors, barristers and judges, financial managers, dental practitioners, and advertising and public relations directors) | -Official definition of occupations (ONS, NS-SEC)<br>- P. Bourdieu's approach for economic, "cultural", and "social" capital<br>-G. Standing's analysis for "precariat" |

The M. Savage's (together with his research team), research (of 2011) has published in 2013. Underlying this empirical research, conducted online by questionnaire, is a synthesis of previous analyzes and intellectual constructs (Goldthorpe, 1982; Erikson and Goldthorpe, 2010; Bourdieu, 1986; Standing, 2011). The research team recognizes seven classes (Savage et al., 2013: 230): 1) The elite, 2) the established middle class, 3) the technical middle class, 4) the new affluent workers, 5) the traditional working class, 6) the emergent service workers, 7) the precariat (according G. Standing). There is, in shadow, an eighth class, namely the synthesis of unemployed people and the people never worked (this research doesn't focus on the certain group).

The model of occupational (NS-SEC) categories of the Office for National Statistics of the UK (ONS) gives the basic idea, to the research group, for the classification and the number of social groups, in the aforementioned effort. It's just that M. Savage (and his research team) has renamed the categories in what I think is a completely untested and theoretically floating manner. Especially the "elite" includes the (code of ONS: L1) Employers in large enterprises (code of ONS: L1),[6] the Higher managerial and administrative

occupations (code: L2), and the Higher professional occupations (code: L3). This inclusion is rather deceptive, because the relative article (the publication of the research) delivers to us the information that part of the so called "elite" includes (as overrepresented categories) the chief executive officers, IT and telecommunications directors, functional managers and directors, barristers and judges, financial managers, dental practitioners, and advertising and public relations directors. This information is impressive. This analysis has an inappropriate content for the bourgeoisie itself or for any kind of "elite" (from the past, the present and the future society).

I am not going to add any comment on the focus of the research and especially on the criteria, which derive from the analysis of P. Bourdieu (1986).[7] From the written criticisms on this published article, I glean the C. Mills' approach: "My conclusion is that for the reasons I outline here, and for others that space limitations prevent me from mentioning, the GBCS is a fiasco. It is so theoretically and methodologically flawed that it can contribute little of value to our understanding of the structure of systematic social inequality in the UK" (Mills, 2014: 443). I don't adopt exactly the C. Mills' opinion, but I keep a deep and intense skepticism for the aforementioned research.

### *Theoretical estimation for bourgeoisie*

In bourgeoisie participate the rich employers (and their decedents/relatives) of large enterprises, who play collectively (either formally or informally) the role of the upper and the ruling class. With an exceptional manner, A. Smith, classical Marxism, M. Weber, Th. Veblen, W. Sombart, V. Pareto, and C. Wright Mills, definitely, confirm that the members of bourgeoisie, namely the capitalists or the stock holders are holders of capital (as well as means of production) and employers. The differentiations for all these approaches regard to the multiple terminologies of the same social group or the different methods of analysis. The T. Bottomore's analysis confirms the basic characteristics of bourgeoisie as a rich and ruling class (Bottomore, 1993: 28, 119). Under some preconditions the same conceptualization regards the approach of G. Dumenil and D. Levy, too. In the analysis of M. Savage et al. the social situation looks ambiguous. In that approach there isn't any clear social group for bourgeoisie. The multitude of ambiguous classes is the prelude of the liquidated social structure (if there is any structure).

Similar absence is found in the table of classes in the official analysis on the distribution of incomes for USA (2010) and the analyses for other areas of the globe (Kharas, 2010). We suppose that the abovementioned absence is the result of a very distant from, or of a poor estimation for the pure theoretical debate. Possibly, there are other undeclared theoretical strategies or untold ideological reasons.

## The contemporary bourgeoisie: *How does it look in the reality?*

### *The basic nature of bourgeoisie: Employers-Entrepreneurs*

In brief, bourgeoisie, mainly, is included in employment's[8] category of (entrepreneurs- employers).[9] It is of course a small fraction of the aforementioned category, because the vast majority of the groups of employers are entrepreneurs of very small enterprises (with 1-9 employees) or of small enterprises (with 10-19 employees).

The real trend for the employers (in small and big sized enterprises) is the continuous reduction of their percentages. The analogies in selected advantaged countries are low (2% to 6%), during the two previous decades of the 21st century (Table 8).

**Table 8.** *Employers in Selected Countries, During the 21st Century. Analogy of Total Employment (%)*

| Country/Year | 2006 | 2010 | 2014 | 2018 |
|---|---|---|---|---|
| Australia | 7.19 | 6.83 | 6.29 | 5.82 |
| France | 4.47 | 4.46 | 4.25 | 4.23 |
| Germany | 4.88 | 4.86 | 4.63 | 4.25 |
| Japan | | 2.23 (2012) | 2.13 | 1.92 |
| Russia | 1.22 | 1.27 | 1.33 | 1.35 (2017) |
| UK | 2.92 | 2.64 | 2.54 | 2.06 |

**Source:** ILO (2019).

The basic corpus of bourgeoisie, according to classical and some contemporary theories, namely the employers (at least a part of them), are members of an absolute small social group and are going to be fewer. That's why the

bourgeoisie have been disappeared (from the table of the measurable classes) by some of the very recent theories (probably the overwhelmed by this reality). The employers look like as a group of aristocracy, namely of an "elite". If this situation is real, then we have to go on with a reconceptualization of capitalism itself.

## *The "real field" of bourgeoisie: The enterprises with personnel*

The data, the numbers, and the percentages of employers and the enterprises (with personnel) are not compatible and therefore are not the objects of a direct comparison. Nevertheless, we can make estimation on both the indications. The vast majority of enterprises and therefore a major fraction of the total number and percentage of employers (according the percentages of the Table 8) in employment are employers of very small sized enterprises (with 1-9 employees). Therefore the vast majority are economically rather weak enterprises. In the certain category are included the 88.4% in France (2017), the 61.72% in Germany (2017), the 91.87% in Greece (2017), the 78.4% in UK (2017), the 66.99% in USA (2015) and the 74.62% in Japan (2016) of the total number of enterprises with personnel. The small enterprises (with 10-19 employees) are the 5.45% in France (2017), the 17.81% in Germany (2017), the 4.29% in Greece (2017), the 9.41% in UK (2017), the 13.41% in USA (2015), and the 10.4% in Japan (2016) of the total number of enterprises with personnel (Table 9).

**Table 9.** *Enterprises with Personnel (%), According OECD (2017 or the latest year)*

| Country/ Number of Employees | 1-9 | 10-19 | 20 and over | [250 and over] |
|---|---|---|---|---|
| France | 88.40 | 5.45 | 6.15 | [0.70] |
| Germany | 61.72 | 17.81 | 20.47 | [2.36] |
| Greece | 91.87 | 4.29 | 3.84 | [0.23] |
| Japan (2016) | 74.62 | 10.40 | 14.98 | [0.93] |
| UK | 78.40 | 9.41 | 12.19 | [0.91] |
| USA (2015) | 66.99 | 13.41 | 19.60 | [1.66] |

**Source:** OECD (2020).

The sphere of very small enterprises (with 1-9 employees), definitely, is not the basic economic and social space of bourgeoisie. Probably or mainly, this group represents the social space of the "petty bourgeoisie",[10] but surely

it isn't the space of bourgeoisie itself. An analogous estimation could be done for the group of the slightly bigger enterprises, namely the "small enterprises (with 10-19 employees)". A small fraction of them (we can suppose that they are the "bigger" of the "small enterprises": i.e. those with 16-19 employees) touches the lower strata (within enterprises) of bourgeoisie, but is not the real core of bourgeoisie itself.

### *The "realm" of bourgeoisie: The larger and the real big enterprises*

We could find the real core and the numeral majority of bourgeoisie within the categories of enterprises with 20 or more employees. They are of course much stronger in comparison with the abovementioned categories, but represent extremely small percentage of the total number of enterprises (attention: this percentage represents an even extremely-smaller analogy of employers within employment in total). How many are they? In a sum they are the 6.15% in France (2017), the 20.47% in Germany (2017), the 3.84% in Greece (2017), the 12.19% in UK (2017), the 19.6% in USA (2015), and the 14.98% in Japan (2016) of the total but essentially small corpus of enterprises (Table 9).

Nevertheless, the real economic and broader power of entrepreneurship there is only in an even smaller fraction (of the aforementioned group) of enterprises with personnel, namely those with 250 or more employees. In this entrepreneurial sphere, there is the smaller (the extremely minimal) fraction of enterprises. They are the 0.7% in France (2017), the 2.36% in Germany (2017), the 0.23% in Greece (2017), the 0.91% in UK (2017), the 1.66% in USA (2015), and the 0.93% in Japan (2016) of the total but essentially small corpus of enterprises (Table 9). They represent definitely a percentage near "nothing" of the near "too small" (for France, Germany, Greece, and even USA) analogy or near "nothing" of the near "nothing" (for UK and Japan) analogy of employers in total employment (according ILO).

The "too small" (or near to "nothing") analogy of the representatives of (the top strata of) bourgeoisie have exposed and are exposing extremely large and provocative amounts of wealth. They manage immense capitals, incomes and probably profits every year. The indicative comparison with the GDP and the public expenses of some selected states, during the second decade of 21st century, shows the real inequality in the economic and social

world and especially (and more impressive) for the advanced countries (See, Table 10).

Under the recent circumstances, some of the most lucrative enterprises (mostly, banks and financial enterprises) have or manage immense in value assets (even a number of trillions US $), every year, but they seem to receive relatively low (of course, in billions US $) revenues and probably profits. Some of the most known enterprises of commerce, industry, and modern technology, receive much larger revenues and profits (in comparison to the aforementioned banks and financial enterprises), but they seem to possess lower amounts (in billions US $) by their owned assets. These enterprises are economically stronger, than many countries of the modern world, during the 21st century.

It is interesting, that these larger enterprises have or manage immense wealth, but they employ rather modest number of employees (i.e. wage-earners). Therefore, their contribution to employment is lower or much lower than their revenues or assets under their management. If we make the indicative (but "softer") comparison of the number of their employees with the public employment of nation-states, then the public employment is incomparable larger, even when the annual revenues of certain enterprises and the annual public expenses (in the public budgets) of significant modern nation-states are compatible (as amounts).[11] The sureness and the relative slogans for the strong impact of the large enterprises' development to the increase of employment have not any real confirmation. We can confirm the much better contribution of the very small, the small and the medium sized enterprises as a whole entrepreneurial space, but these smaller enterprises live continuously the extremely great economic pressure and the day-to-day threat for the "exodus" (drawing out) from the market. The economic threat comes definitely from the above mentioned gigantic enterprises. Of course, there isn't any equality either among unequal people either among unequal economic institutions or among unequal enterprises. In these "places" there isn't any comparison.

It is obvious, that several of the above mentioned gigantic and extremely wealthy (private) enterprises are controlled (or are owned), for many decades, by the same families.[12] In those enterprises, the arguments for the economic and social mobility are canceled. The privileges of heritage and affinity prevail. Of course there are possibilities of some opportunities

and few newcomers in the entrepreneurial procedures, but there isn't any sureness that these aren't only exceptions.

**Table 10.** *Selected Enterprises (an indicative presentation) and Economic Power (for Selected Countries)*

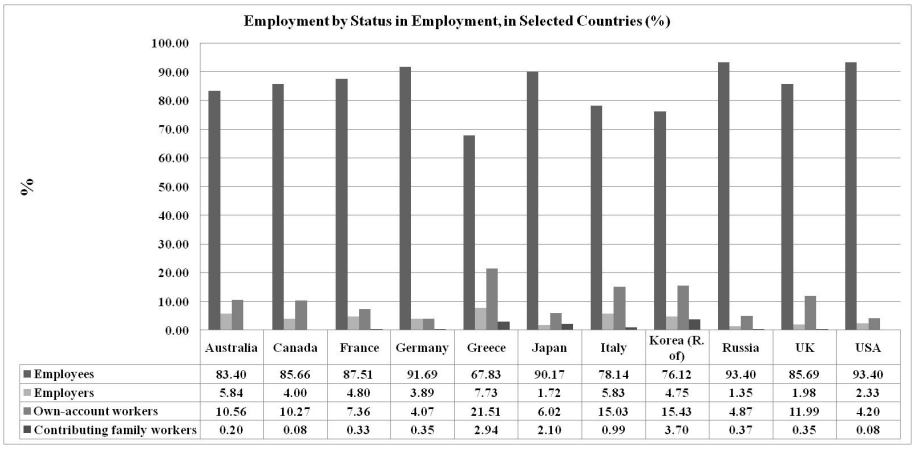
| *Enterprises* | Revenue | Assets [Total] or Assets Under Management | *Country* | GDP | Public Expenditures |
|---|---|---|---|---|---|
| BlackRock, Inc.[13] | 14,539 bill. US$ (2019) | [Assets] 159,573 bill. US$ (2019) [Value of Management] *7,43* trill. US$ (2019) | China (P.R.) | *11,391.619* trill. US$ (2015) | 2,708 trill. US$ (2016) |
| JPMorgan Chase & Co.[14] | 115,627 bill. US$ (2019) | *2,687* trill. US$ (2019) | UK | *2,649.890* trill. US$ (2016) | 1,097 trill. US$ (2016) |
| Citigroup[15] | 75,1 bill. US$ (2019) | *1,978.8* trill. US$ (2019) | Italy | *1,825.820* trill. US$ (2015) | 889,8 bill. US$ (2016) |
| Berkshire Hathaway Inc. [16] | 247,837 bill. US$ (2018) | *707,794* bill. US$ (2018) | Switzerland | *659,850* bill. US$ (2015) | 213,4 bill. US$ (2016) |
| Walmart Inc.[17] | *523,964* bill. US$ (2020) | 236,494 bill. US$ (2020) | Sweden | *511,397* bill. US$ (2015) | 250,2 bill. US$ (2016) |
| Toyota Motor Corporation[18] | 275,4 bill. US$ (2020) | *492,7* bill. US$ (2020) | Poland | *477,058* bill. US$ (2015) | 86,56 bill. US$ (2016) |
| Royal Dutch[19] Shell PLC | 344,9 bill.US$ (2019) | *404,3* bill.US$ (2019) | Belgium | 455.336 bill. US$ (2015) | 245 bill. US$ (2016) |
| Exxon Mobil [20] Corporation | 279,3 bill.US$ (2018) | *346,2* bill. US$ (2018) | Austria | *377.157* bill.US$ (2015) | 192,6 bill. US$ (2016) |
| Amazon.com, Inc. [21] | *280,522* bill.US$ (2019) | 225,248 bill. US$ (2019) | Singapore | *296,835* bill. US$ (2015) | 44,83 bill. US$ (2016) |
| Microsoft Corporation [22] | *143* bill.US$ (2020) | 301,311 bill.US$ (2020) | New Zealand | *173,256* bill.US$ (2015) | 67,01 bill. US$ (2016) |

**Sources:** ILO (2018, 2019); IMF (2017); Central Intelligence Agency (USA); references for the enterprises (in the endnotes).

The top capitalists of modern capitalism look provocatively like the old aristocrats. In my opinion the real prevailing capitalists are found in a difficult contradiction with the principles and the declared values of capitalism itself. Practically, the great masses of people are excluded from the legal right of free choice in market, namely of the entrepreneurship itself, and the human right of welfare.

## Social Polarization

### Graph 1




| | Australia | Canada | France | Germany | Greece | Japan | Italy | Korea (R. of) | Russia | UK | USA |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Employees | 83.40 | 85.66 | 87.51 | 91.69 | 67.83 | 90.17 | 78.14 | 76.12 | 93.40 | 85.69 | 93.40 |
| Employers | 5.84 | 4.00 | 4.80 | 3.89 | 7.73 | 1.72 | 5.83 | 4.75 | 1.35 | 1.98 | 2.33 |
| Own-account workers | 10.56 | 10.27 | 7.36 | 4.07 | 21.51 | 6.02 | 15.03 | 15.43 | 4.87 | 11.99 | 4.20 |
| Contributing family workers | 0.20 | 0.08 | 0.33 | 0.35 | 2.94 | 2.10 | 0.99 | 3.70 | 0.37 | 0.35 | 0.08 |

**Source:** ILO (2022).

Social polarization is an undeniable fact. The above Graph 1 certificates that the disappearing of the bourgeoisie (or of the capitalist class) in modern class analyses is fully understandable. It is an exceptional minority. Somewhere were too few and became fewer. In other countries the employers are very near (as a percentage) to "nothing" as analogy within the (statuses of) employment. We have to think that the vast majority of employment includes mainly the employees,[23] namely the wage earners. With the exception of the public employment, the employers (-entrepreneurs) give work to the majority of wage earners.[24] In this vast majority are included both the great mass of working class (either manual or mental workers) and the much smaller group of the members of the new middle strata (or class), who are a minority of (middle managers and supervisors) employees. As parts of

the minorities, within employment, participate the own-account workers[25] (less than 16% in the most cases, with an exception)[26] and the contributing family workers[27] (less than 3%, with an exception).

The aftermath of the above indications makes easier the gleaning of the following findings and estimations: 1) The core of the upper and ruling class, namely the bourgeoisie is and is going to be extremely small group (Lytras, 2022), but represents unbelievable personal (or small groups') wealth (Lytras, 2020: 49-51). 2) The employment's and social space of traditional middle class (or petty bourgeoisie) shows the pessimistic orbit of a minority (ibid: 56-58). 3) The agents of wage labor, namely the employees, are the vast majority of employment and society (ibid: 122-124). The members (wage-earners) of the new middle strata (middle managers, supervisors etc.) are a minority of the wage laborers (Lytras, 2019). Social polarization, with the special focus on employment's data, is obvious and wide (Lytras 2020, 17-21). We could predict a trend for a wider social polarization in the near future. Definitely, the social polarization is confirmed, by all the available data, in this article. Social balance is probably an aim, but is not finding here and now.

## Conclusion

Bourgeoisie (or capitalist class) is a social class of capitalist society, more precisely the upper and therefore the ruling class of the contemporary advanced societies, in 21st century. It is confirmed in classical and contemporary theory, beyond the differentiations of the nominations (or the terminologies), of the methods of approach, and of the technical tools of researches. The reality is clear and transparent in the data of international organizations (ILO, OECD etc.). Bourgeoisie is a small minority of the advanced societies, but is extremely wealthy, in the 21st century. They are the representatives of a small group or fraction of the owners (or partners) of the larger enterprises with personnel. They control the economic world and seem to have bigger power than the most modern advanced nation-states. The economic, social and political equilibrium is dubious and surely not well balanced. The members of bourgeoisie were too few (during the 20th century) and they are fewer nowadays. There are surveys and/or researches (U.S. Department of Commerce, 2010; Kharas, 2010; Standing, 2011; Savage

et al., 2013) with concealments of the reality (either for bourgeoisie either for the other classes or for the formation of class structure). In several fields, they have a very "flexible" theoretical approach, some ambiguous (or/and arbitrary) conceptualizations, a doubtful analytical basis (via the synthesis of incompatible features and elements), several problematic results (i.e. overrepresentation several professional categories in single "classes", two middle classes or a gigantic middle class, three lower classes or an ambiguous working class etc.) and negativity for the image of the obvious class structure, in modern society. Therefore, there are elaborations, without the proper focus on the analysis of employment by status (employees, employers, own-account workers, contributing family members etc.) in employment, which ignore the reality of the extremely small minority of employers (within this group there is the small fraction, namely the bourgeoisie itself) and of the vast majority of employees (the wage-earners). So, they have neither a clear reception of the theoretical debate, nor the proper management of the available empirical data. An unspoken ideological reason is a possible explanation. A new approach of analysis and a more accurate evaluation of the facts are necessary.

## Notes

1. There are several factors, which definite the origins and the ownership of capital. Affinity and inheritance are crucial factors for the initial accumulation of capital (see, "List of wealthiest families", Wikipedia, https://en.wikipedia.org/wiki/List_of_wealthiest_families; Wolfe, 2000). We could observe in these data (see in the next pages of this article for several others), that either the members of the same family participate in the small group of the extremely rich people either in several of the larger private enterprises the members of the same family are the owners or the members of the same family control for decades (or more) the gigantic enterprises of our era.
2. The landlords represent the class of rulers, who come from the past but still play an important role at the time of writing of the *Wealth of Nations*. It must not be forgotten that the ...*Wealth of Nations*… was written and published in a transitional age (1776), when capitalist enterprises tended to change and as the Industrial Revolution took its first immature steps (the steam engine had not yet been applied). But they are not alone, in 1776, and things will change noticeably from the end of the eighteenth century.

3. "As soon as stock has accumulated in the hands of particular persons, some of them naturally employ it, by setting industrious people, whom they will supply with materials and subsistence, in order to make a profit, by the sale of their work, or by what their labour adds to the value of the materials"…. "The value which workmen add to the materials, therefore, resolves itself in this case into two parts, of which the one pays their wages and the other the profits of their employers upon the whole stock of materials and wages, which he advanced" (Smith, 1887: 48-49).
4. Then he demands the protection of the rich people: "The affluence of the rich excites the indignation of the poor, who are often both driven by want, and prompted by envy, to invade his possessions. It is only under the shelter of the civil magistrate that the owner of that valuable property, which is acquired by the labour of many years, or perhaps of many successive generations, can sleep a single night in security. He is at all times surrounded by unknown enemies, whom, though he never provoked, he can never appease, and from whose injustice he can be protected only by the powerful arm of the civil magistrate continually held up to chastise it. The acquisition of valuable and extensive property, therefore, necessarily requires the establishment of civil government. Where there is no property, or at least none that exceeds the value of two or three days labour, civil government is not so necessary. Civil government supposes a certain subordination. But as the necessity of civil government gradually grows up with the acquisition of valuable property, so the principal causes which naturally introduce subordination gradually grow up with the growth of that valuable property" (Smith, 1922: 203).
5. The M. Weber's widen reference is the following: "As thus defined the class citizen" ('*bürgertum*', which means: the *bourgeoisie*) "is not unitary; there are greater citizens and lesser citizens. Entrepreneurs and hand workers belong to the class. Second," (*bourgeoisie*) "signifies the membership in the state, with its connotation as holder of certain political rights". "Finally …" (*bourgeoisie*), "in the class term, we understand those strata, which are drawn together in contrast with the bureaucracy or the proletariat and any other outside their circle as 'persons of property and education', entrepreneurs, recipients of funded incomes, and in general all the persons of academic culture, a certain class standard of living, and a certain social prestige" (Weber, ibid: 315).
6. In the classification of ONS (2020), the Employers of small establishments (code: L8) and the Own-account workers (code: L9) are included in (code: L7) Intermediate occupations. They follow the previous group of Lower professional and higher technical occupations (code: L4), which includes the Lower mana-

gerial and administrative occupations (code: L5), and the Higher supervisory occupations (code: L6).

7. I have several objections on the different kinds of "capital," according P. Bourdieu. The basic regards the nature of the "social capital" and the "cultural capital". My opinion is that their content regards the relative resources, but these aren't capital or stock of any kind, during the capitalist era. If the abovementioned resources take place in any kind of money transactions, then their value is, definitely, an exchange value (an expression of capital, namely the only capital). We don't need any new term for the replacement of the established terms. The invention of new nominal expressions doesn't eliminate the facts and the economic or social realities.
8. The classification recognizes the follow statuses and their official mark numbers: 1. Employees; 2. Employers; 3. Own-account workers; 4. Members of producers' cooperatives; 5. Contributing family workers; 6. Workers not classifiable by status. See, ILO (1993).
9. "Employers are those workers who, working on their own account or with one or a few partners, hold the type of job defined as a 'self-employment job', and, in this capacity, on a continuous basis (including the reference period) have engaged one or more persons to work for them in their business as 'employee(s)'. The meaning of 'engage on a continuous basis' is to be determined by national circumstances, in a way which is consistent with the definition of 'employees with stable contracts'. The partners may or may not be members of the same family or household." See, ILO, ibid.
10. We could assume, indirectly, that in A. Smith's analysis (Smith, 1887: 50-51) the middle class regards the farmers and the craftsmen (as the agents of a synthesis of incomes, namely the wages and the profits). The same theoretical basis uses critically K. Marx (Marx, 1863: https://www.marxists.org/ archive/marx/works/1863/theories-surplus-value/add1.htm#s12d; Marx, 1981: 455-458) and the result of his elaboration concludes both farmers and craftsmen in the petty bourgeoisie ("class" or "strata"). It is not exactly clear if in that social group are members both of the own-account workers and, equally, of the small employers. The same ambiguity is understandable in the R. Luxemburg's analysis [Luxemburg, 1988: 80-82; Luxemburg, 1999: Part One, Chapter 2 (https://www.marxists.org/ archive/luxemburg/1900/reform-revolution/ch02.htm)]. According to V.I. Lenin's (Lenin, 1964[4]: 344-355, 356-360) elaboration, the social buffer for both the petty bourgeoisie and the real bourgeoisie itself is described by the diffusion of the directive ability (or power) from the labor, the ability to reproduce the individual capital without the execution of the direct labor by the entrepreneur

(and/or of the contributing family members), and all the above preconditions are realities, when an employer uses enough wage-earners (i.e., 15-30 persons). Nevertheless, the debate is open among Marxists of our era. The most known indication there is in E.O. Wright's analysis. E.O. Wright reinvented once again the petty bourgeoisie (Wright, 1985: 48-51, 150-151) as exclusively own-account workers (i.e. without any wage-earner, with some doubts for the clear approach). The small employers (with 1-9 wage- earners, with some more doubts for the clear approach) are members of one of the "contradictory class locations" (he recognizes three). They are not members of petty bourgeoisie, but they are not full-fledged capitalists, too. I have concrete objections to this analysis for serious theoretical and empirical reasons (Lytras, 2020: 44-45). I choose to say, that the employers with 1-9 wage-earners and especially the employers with 1-6 wage-earners (I estimate that they are the majority or vast majority of employers in any country) have probably the characteristics of petty bourgeoisie (they really work side by side with their wage-earners, use typically or actually contributing family members, and slightly reproduce their small capitals). Of course, their function makes no special distance from exploitation, as a capitalistic procedure.

11. We are going to give some impressive paradigms of employment, in well-known enterprises: The Walmart Inc. (Revenue, 2020: 523,964 billion US$) has had 2,3 million employees (2022), globally; the Amazon.com, Inc. (Revenue, 2019: 280,522 bill. US$) has had 1,3 mill. employees (2022); the Target ("Target Corporation", Wikipedia, https://en.wikipedia.org/wiki/Target_Corporation) Corporation (Revenue, 2019: 75,356 bill. US$) has had 409.000 employees (2020); the Berkshire Hathaway Inc. (Revenue, 2018: 247,837 bill. US$) has had 372.000 employees (2021); the Toyota Motor Corporation (Revenue, 2020: 247,837 bill. US$) has had 372.000 employees (2021); the Siemens AG (Revenue, 2021: 247,837 bill. €) has had 303.000 employees (2021); the JPMorgan Chase & Co. (Revenue, 2019: 115,627 bill. US$) has had 288.474 employees (2022); the Royal Dutch Shell PLC (Revenue, 2019: 344,9 bill. US$) has had 86.000 employees (2022). See the information of enterprises, in Table 3.3.l and the relative references. Some indications of advanced nation-states are the following: Australia (Public Expenditures, 2016: 446,4 billion US$) has had 11,973 million people (2016) as total employment and the 18.97% (approximately, 2,271 mill. people) is the percentage of public employment (2016); Sweden (Public Expenditures, 2016: 250,2 bill. US$) has had 4,772 mill. people (2014) as total employment and the 29.13% (approximately, 1,390 mill. people) is the percentage of public employment (2014); the Netherlands (Public Expenditures, 2016: 337,6 bill. US$) have had 8,615 mill. people (2017) as total employment and the 12.19%

(approximately, 1,050 mill. people) of them is the percentage of public employment (2017); Denmark (Public Expenditures, 2016: 164,5 bill. US$) has had 2,772 mill. people (2017) as total employment and the 31.05% (approximately, 860.706 people) is the percentage of public employment (2017); Norway (Public Expenditures, 2016: 188,8 bill. US$) has had 2,658 mill. people (2017) as total employment and the 30.30% (approximately, 805.374 people) is the percentage of public employment (2017). USA (2015) have had, by far, the wider public employment (16.50% or approximately 24,5 million people) in number. The nation-state is the most significant single employer (during the 21st century) of modern capitalism. See, 1) for public expenditures: Central Intelligence Agency (USA), *The World Factbook*; 2) for the general level of employment and the public employment: ILO (2018, 2019); 3) for analytical data for public expenditures, see Lytras (ed.) 2017: pp. 180-201.

12. It is an indicative information, that Ford family possesses only the 2% of the total shares (of Ford Motor Company), but controls the 40% of the relative votes ("Ford Motor Company", Wikipedia, https://en.wikipedia.org/wiki/Ford_Motor_Company). Another crucial information is that (the members of) Siemens family is the major owner of Siemens A.G., but possesses only the 6,9% of the total number of shares ("Siemens", Wikipedia, https://en.wikipedia.org/wiki/Siemens). Families like the aforementioned are included in the lists of the wealthiest families, worldwide ("List of wealthiest families", Wikipedia, https://en.wikipedia.org/wiki/List_of_wealthiest_ families).
13. "BlackRock", Wikipedia, https://en.wikipedia.org/wiki/BlackRock.
14. JPMorgan Chase & Co, Wikipedia, https://en.wikipedia.org/wiki/JPMorgan_Chase, https://en.wikipedia.org/wiki/JPMorgan_Chase#Financial_data.
15. Citigroup, *Quarterly Financial Data Supplement 2021*, https://www.citigroup.com/rcs/citigpa/ akpublic/storage/public/qer421s.pdf?ieNocache=412.
16. "Berkshire Hathaway", Wikipedia, https://en.wikipedia.org/wiki/Berkshire_Hathaway.
17. "Walmart", Wikipedia, https://en.wikipedia.org/wiki/Walmart#2011%E2%80%932019.
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20. Exxon Mobil, *2019 Financial Statements and Supplemental Information*, https://corporate. exxonmobil.com/-/media/Global/Files/investor-relations/annual-meeting-materials/financial-statements/2019-financial-statements.pdf.

21. "Amazon (company)", Wikipedia, https://en.wikipedia.org/wiki/Amazon_(company).
22. "Microsoft", Wikipedia, https://en.wikipedia.org/wiki/Microsoft.
23. "Employees are all those workers who hold the type of job defined as 'paid employment jobs'. Employees *with stable contracts* are those 'employees' who have had, and continue to have, an explicit (written or oral) or implicit contract of employment, or a succession of such contracts, with the same employer on a continuous basis. 'On a continuous basis' implies a period of employment which is longer than a specified minimum determined according to national circumstances. If interruptions are allowed in this minimum period, their maximum duration should also be determined according to national circumstances. Regular employees are those 'employees with stable contracts' for whom the employing organization is responsible for payment of relevant taxes and social security contributions and/or where the contractual relationship is subject to national labour legislation" (ILO, 1993, ibid).
24. A rational question is related with class status of the aforementioned wage earners. A certain approach on this subject regards another essay or article, in the near future.
25. "Own-account workers are those workers who, working on their own account or with one or more partners, hold the type of job defined as 'a self-employment job', and have not engaged on a continuous basis any 'employees' to work for them during the reference period. It should be noted that during the reference period the members of this group may have engaged 'employees', provided that this is on a non-continuous basis. The partners may or may not be members of the same family or household" (ILO, 1993, ibid).
26. The own-account workers are the basic group of the old middle class (petty bourgeoisie or old middle strata).
27. "Contributing family workers are those workers who hold a 'self-employment' job in a market-oriented establishment operated by a related person living in the same household, who cannot be regarded as a partner, because their degree of commitment to the operation of the establishment, in terms of working time or other factors to be determined by national circumstances, is not at a level comparable to that of the head of the establishment. Where it is customary for young persons, in particular, to work without pay in an economic enterprise operated by a related person who does not live in the same household, the requirement of 'living in the same household' may be eliminated" (ILO, 1993, ibid).

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# Exploring the impact of the economic crisis on the social and environmental values of young adults (2007-2023)

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## Abstract

Both individual and social values may diversify, even though they hardly change and this happens only through long-term processes, as long as the changing circumstances require people to adapt to new situations. Greece is one of the Southern European countries that was severely impacted by the debt crisis. The dramatic deterioration of economic indicators weakened the sense of security in people, violently exacerbated the living conditions, and drastically limited the capabilities for self-realization, but also for professional development especially for young people. To what extent, however, did these circumstances affect the values of the Greek society? This article presents part of the findings of a survey that aimed to examine -among other issues-value structures of young adults in the years 2007-2015, 2019 and 2023. In general, certain pro-social and environmental values are found to be reinforced along with the weakening of the importance of economic independence, but also a tendency towards competitiveness.

**Keywords:** *economic crisis, social values, environmental values*

## Introduction

The messages coming from Europe since the banking crisis that started in the US in 2007, culminating in the bankruptcy of the Lehman Brothers

investment bank in August of 2008, were deeply pessimistic. Markets and experts had already begun to realize that a deep crisis in the banking system within a globalised environment would not be easy to contain geographically. Indeed, very soon the countries of the EU and the Eurozone began drawing up measures to protect their economies and the European banks. However, the crisis was not averted. After the blow suffered by the banking system of Iceland, many countries that had difficulty borrowing on the international markets and faced the risk of the collapse of their banking system, were deeply exposed to the risks of a global financial crisis. Especially the countries in Southern Europe which already showed a high debt-to-GDP ratio whose economies were faced with important structural weaknesses, soon found themselves in the eye of the storm. The crisis eventually broke out violently with incalculable and unforeseeable consequences both for the economies and for the societies, which they continue to face until today. The extremely austere fiscal policy imposed on some of the Eurozone countries by international institutions (IMF, EU) included deep salary and pension cuts along with structural changes in their economies, an increase in taxation as well as extreme expenditure reduction in crucial sectors, such as social protection, education, and health.

## The social impact of the economic crisis on Greece

In Greece, the debt crisis very soon turned into a social crisis. Many analysts used the term "humanitarian crisis" to describe the state of the country especially during the early years of the implementation of these drastic measures (UN NEWS, 2015; Independent, 2017). Important indicators deteriorated radically, sinking the economy of the country into a deep recession, widening inequality, exacerbating the existing social problems and causing a worsening of social vulnerability (Melidis and Tzagkarakis, 2020; Petmesidou and Guillén, 2014). According to IWF's data, the Greek economy experienced in 2008 a recession of 0.4%. A year later, the percentage increased to 4.4%, in 2010 to 5.4%, and in 2011 the recession reached 8.9% (IWF online data). This development was followed by thousands of job losses across nearly all sectors of the economy. Unemployment rose rapidly. Specifically in 2008, the unemployment rate was 7.8%. In 2013, the rate was 27.5% and it remained above 21% until 2017, when it started scaling down, albeit slowly, up until

today (17.3% in 2019). In their majority (75%), people are unemployed for long periods of time and, as is usually the case, younger people are severely impacted. This is also reflected in the relevant indicators. Specifically, the unemployment rate for the age group 15-39 was slightly above 37% in 2009, in 2014 it reached 70% and it fluctuates between 60% and 70% ever since then (Tsakloglou, 2017; Matsaganis, 2013). Significant salary and pension cuts along with the general decrease in GDP (according to the OECD's data, the GDP was reduced by approximately 23% for the years 2007-2015) resulted in the drop of the average income in Greece by 27.5% from the beginning of the crisis until 2015 and an increase in the relative and anchored poverty rate (anchored poverty rate over 40%. Tsakloglou, 2017; Vavoura and Vavouras, 2022; OECD online data).

All of the above was accompanied by major social problems, an increased risk of social exclusion and poverty. The increase of substance abuse and the rise of the suicide rate are indicative of the deep impact of the economic crisis on the Greek society, while according to the conclusions of an Action Aid study, the crisis may also be connected to an increasing trend in domestic abuse (Glyniadaki, Kyriazi and Mourtzaki, 2018). In fact, as practice demonstrated, this crisis would ultimately be unprecedented not only in its intensity but also in its duration. Therefore, in a situation where the need for social protection and security increased, the social state and the ability to provide protection to people diminished. The network of institutions that have to do with physical and mental health was significantly weakened both because many of them were removed and because their productivity decreased due to the reductions in the available resources and staff (Economou, 2018; Souliotis et al., 2018; Xenos et al., 2017). Even though it is difficult to ascribe the general state of health of the population to specific factors with certainty, certain indicators show a worsening tendency during the economic crisis as a result of the reforms that aimed to reduce expenditures in healthcare generally, as well as due to the drop in income (Stylianidis and Souliotis, 2019; Laliotis et al., 2016; Petmesidou et al., 2014). Lyberaki et al. (2022) discovered in their study that in Greece an Italy the most vulnerable people (e.g. older individuals) experienced during the pandemic more pronounced health deterioration and greater prevalence of sadness compared to other countries. In his relevant study, Economou (2018) points out as an indicator the reduction in life expectancy by 2.3 years for men and by 2 years for

women between 2010 and 2016. The infant mortality rate in Greece was constantly below the EU-28 average. This trend was reversed and in 2016 infant mortality was 0.6% above the EU average.

Recent study findings reflect a significant increase in suicidatlity in the countries that were more severely impacted by the economic recession and the austerity measures, such as Greece and Italy (Economou et al., 2018 and 2013; Rachiotis et al., 2015; De Vogli et al., 2013). For example, as regards Southern European countries that were severely impacted by the recession, an early estimation of its long-term consequences on Italy ascribes approximately 200 deaths per year to the rise in unemployment which relate to suicidality and to substance abuse (Costa et al., 2012; cited in Economou et al., 2018: 28). As for Greece, relevant surveys clearly connect the increase in suicides and deaths by substance abuse with the general socio-economic circumstances emerged during the economic crisis in the country, especially with insecurity, recession, unemployment and poverty (Economou et al., 2018; Antonakakis and Collins, 2014).

The deeper the economic crisis and the longer it lasts, the deeper the expected potential changes are in relation to how people view their life, their relationships with other people, what prospects they think they have for professional rehabilitation and the capabilities for self-realization. Throughout this crisis, people in Greece realised that they would need to increasingly depend on their own power. The fear for the future is deeply prevalent throughout this period among young people; this is also proven through the major wave of immigration to other countries, mostly within Europe. According to data collected throughout this period, in this last decade a high percentage of highly educated people migrates from Greece, a phenomenon known as brain drain (Karasidis, 2016). Van Moll discovered in his survey (2014) an intention for migration aspirations among young people in Greece amounting to 44,6%.

Taking into account the above data, we can argue that this dramatic, for the people, period gives us the opportunity to study the -potential- restructuring of the value system in the Greek society or the individual changes in relation to certain values. Even though values are very difficult to change and do so under very special circumstances (Stern, 2000), the question is whether the situation that the Greek society experiences, the violent social change that takes place in this long-term crisis, gradually causes changes

in the importance of values and creates new tendencies regarding the value structures, especially those of young people.

## Values, social change and the environment

Values are a powerful factor which defines social norms, attitudes and behaviors within each and every society. As Kluckholn (1951) points out, values represent what is desirable in a society, which influences the choice of models, means and actions within the society. Values are 'desirable goals, varying in importance, that serve as guiding principles in people's lives' (Schwartz, 1992: 21). In this light, values express what is considered important and given within a society, but also play an important role in any process of social change.

Values are very stable over time; they are passed down from one generation to another, and are deeply rooted in the conscience of people. However, as value structures are formed based on the general context, deep changes within said context affect them and may, to some extent, change them. Intercultural studies confirm the phenomenon of value change in different periods and societies. Perhaps the most well-known study about the role of the cultural and economic changes on value structures is Inglehart's. More particularly, he connected value change with the process of modernization, with the important changes taking place as industrial societies experience sufficient economic growth. According to him, this triggered a process where value priorities shift away from materialism to postmaterialist values, from concerns about security toward emphasis on quality of life, personal choice and self-expression. The more economic prosperity reduces 'existential constraints on human choice and liberates people from the pressures of material scarcity', the more this process leads to the liberation of people 'from cultural constraints, which are necessarily relatively restrictive under conditions of scarcity' (Inglehart and Oyserman, 2004: 3; Inglehart, 1987 and 1997).

Such an example of postmaterialistic values are also the values related to the protection of the environment and to man's relation with nature. The dissipation of environmental concerns and of ecocentric values to the industrially developed societies has gradually led to important changes in people's behavior, to the reinforcement of environmentalist movements as well as to important developments on the level of politics and institutional

framework for the management of environmental issues. The survey discovered both the relation of postmaterialistic values with pro-environmental behavior and the relation of materialistic values with anti-environmental behavior (Hurst et al., 2013; Schwarz, 1994, 2010; Carlo and Randal, 2002).

Findings from surveys carried out by Schwartz in different societies confirm that changes in certain values types, such as egalitarianism, autonomy as well as values that concern the relations between people, but also with the natural environment, are connected with economic and social development. As socio-economic circumstances change, so do the interpersonal relationships, while a new relationship is formed between man and the natural environment whose trait is 'harmony' (Schwartz, 2006). What happens, however, when the socio-economic circumstances deteriorate, as was the case during the fiscal crisis, along with the environmental circumstances that are formed under the influence of climate change? Undoubtedly, social change requires people to adapt to new circumstances, develop new ways to cope with their problems, form a different view about their social and natural environment and their relation to it (Gelfand et al., 2011). Conversely, in cases of deep social change, it is of particular interest to study if the new social, economic, and environmental context has an impact on persisting beliefs and value systems and creates new behavioral tendencies (Inglehart, 1987; Inglehart and Welzel, 2005; Franzen and Meyer, 2010; Kendal and Raymond, 2018; Triandis et al., 1985).

The survey about values and their role is based, to a significant degree, on Schwartz's analyses (1992, 1994). Most intercultural studies discover that societies show a mix of characteristics regarding core values, including collectivism and individualism. Thus, individualism and collectivism coexist in the value system and influence the individual and collective behavior to a different degree each time (Triandis, 1993; Voronof and Singer, 2002; De Groot and Steg, 2007). According to Hui and Triandis' scale for measuring individualism and collectivism (1984, 1985), collectivism means that someone is interested in others, calculates the consequences of their decisions for others and shares the same material sources. The main difference between collectivistic and individualistic cultures is the emphasis given by people on collective goals or on the desires and needs of each individual separately (Greenfiled, 2000). Individualistic cultures give emphasis on the independence of the individual and promote the achievement of individual rather

than collective goals. The freedom to express personal emotions and desires is also important. Collectivistic cultures are distinguished for interdependent relationships and for placing importance on norms (Markus and Kitayama, 1991; Matsumoto et al., 2000).

The relevant literature distinguishes between allocentrism on the level of the individual, when he subordinates his personal aims to the common aims of the group, and idiocentrism when he places his personal aims before those of the group (Triandis et al., 1985). Triandis et al. (1985) point out that allocentrism is observed when there is social support for the group, whereas idiocentrism is displayed where there is solitude and an emphasis on personal success.

Over the last decades, interest in the field of environmental research has increasingly focused on the issue of values and how these affect environmental attitudes and behavior (Tamayo and Schwartz, 1993; Schulz and Zelezny, 1998; Nordlund and Garvil, 2002; Spini, 2003; Poortinga, Steg and Vlek, 2004; Oreg and Katz-Gero, 2006; Bardi and Goodwin, 2011; Hurst et al., 2013; Van der Werff et al., 2013). Attitudes are formed based on values and are considered to be less stable (Stern and Dietz, 1994). Thus, although research on environmental behavior was particularly focused on environmental attitudes for a long time, it gradually shifted its interest towards values and how different categories relate to environmentally significant behavior (Stern, 2000; Steg and Nordlund, 2012; Hofstede and Milosevic, 2018). Since then, the powerful role of certain values has been confirmed, especially of collectivistic, individualistic and environmental values with views, attitudes, and behavior of people in relation to the natural environment (Steg et al., 2014; Steg et al., 2005).

## Value structures in the Greek society

As intercultural studies have shown, in general we can distinguish between collectivistic and individualistic societies. However, collectivism and individualism cannot be defined very strictly. Many societies that are characterised as collectivistic show among them important differences in their various traits, but also as to the degree of collectivism.

The Greek society, too, has mixed characteristics, but with a stronger tendency towards collectivism (Triandis, 1989). The rapid changes in the

years after the Second World War abruptly led to transition. Traditional structures were retained to some extent, whilst at the same time personal aspirations towards socio-economic success were intensively pursued and values shifted towards individualism. Georgas (1989) points out that social changes caused in Greece by cultural and technological factors, urbanisation, and changes in the family system from extended to nuclear, were accompanied, among other things, by changes in values, especially by a shift from traditional collectivistic to individualistic. According to Hofstede's model (1983, 2010), the Greek society is on a middle ground with a stronger tendency towards collectivism which is expressed through a greater emphasis on collective goals. At the same time, the role of the in-group is important. The study carried out by Triandis and Vassiliou (1972) researched the differences between Greeks and Americans in relation to the importance of the in-group. Findings showed a stronger tendency for Greeks to base their decisions on the opinions of the individuals from the in-group. Matsumoto et al. (2008) researched expressivity towards in-groups and out-groups in different societies. The first case is characteristic of collectivistic cultures which, as per their analysis, also include the Greek society.

Lampridis and Papastylianou discovered in a recent study (2014) that young people in Greece hold a positive attitude towards prosocial behavior, however participants 'were found to be almost equally oriented towards individualism and collectivism' (p. 11). In another intercultural study, Papastylianou and Papadimitriou (2014) researched the relation of collectivism, individualism and environmental values to environmental attitudes and environmental behavior in university students from Greece, Switzerland, and Cyprus. One of the main conclusions concerned the special correlation between collectivistic and environmental values and the environmental behavior, especially in the Greek sample; on the contrary, the correlation between environmental attitudes and environmental behavior was significantly stronger for the university students from Switzerland, which is also corroborated by other studies in other countries (e.g. the Netherlands. Steg et al., 2011). Nevertheless, one of the general conclusions of this study is that environmental values appear to be comparatively fairly new for the Greek society and have not been established yet in the value system of the participants from Greece, despite the fact that values seem to have a very strong influence on the behavior of the Greek people (Papastylianou and

Papadimitriou, 2014). Therefore, one can assume that environmental values may be more easily influenced in periods of socio-economic crises.

The power of the collectivistic characteristics of the Greek culture is also evident from the fact that they are preserved to a significant degree, even within different cultural environments, when e.g. Greeks are immigrants in other societies. Rosenthal et al. (1989) researched the profile of Greek immigrants that had moved to Australia for more than 13 years. As regards their values, they discovered that older people generally maintained the collectivistic values of their culture. Overall, they found a maintenance by Greek immigrants of traditional Greek values, with some shift towards Anglo-Australian behavioural norms. Other studies with Greek immigrants show similar findings. Koutrelakos (2004) compared Greek Americans to Greeks and to third-generation white Americans and investigated if Greek Americans change from a collectivistic orientation to a more individualistic orientation in their intimate relationships. Findings indicated that Greek Americans formed a more individualistic orientation in terms of self-disclosure. However, at the same time they maintained a collectivistic orientation regarding self-sacrifice in intimate relationships.

Undoubtedly, values are characterised by stability and may change through long-term processes, as long as people need to adapt to a constantly changing framework (Manfredo et al., 2017; Gouveia et al., 2015; Milfont et al., 2016; Vecchione et al., 2016). In that context, of particular interest for the study presented in this article is, among other aspects, the question to what extent these new environmental values are resilient and how the collectivist and individualist values are influenced in cases where economic security ceases to exist and the desire for self-expression is again outweighed by insecurity, fear for the future, and the various consequences of the widening social inequality.

## Overview of the present study

This study investigates the potential impact of the long-term economic crisis on certain values in a sample of university students from Greece. Given the special circumstances of the Greek society for about fifteen years now and the violent social changes caused by the debt crisis and the deep recession, searching for indications of a shift regarding certain values is of particular

interest. It is also worth mentioning that the study also covers the period of the pandemic which resulted in an unprecedented and high-intensity stressor for the entire society. There is no doubt that the crisis that started more than 15 years ago caused existential fear, insecurity, stress and uncertainty about the future. At the same time it was necessary for Greek society to develop solidarity, mutual aid, cooperation and even altruism in order to cope with the adversities of everyday life. The aim of this study is to invetigate the impact of the debt crisis on several social value categories including environmental values. As long as the protection of the environment and the harmonic relationship between man and nature are developed, according to Inglehart, as postmaterialistic values in a safe environment of well-being, they may step back in the hierarchy of values, when other priorities and needs suddenly gain particularly significant importance.

## Method and materials

This study covers a 16-year period, in particular the years 2007-2015, and the years 2019 and 2023. In each of these years, a sample of university students filled out questionnaires during the first months of their enrollment in the university. The total sample comprises N=1.244 students and their distribution per year amounts between 106 and 122. The distribution according to gender was 81,3% female and 18,7% male which also corresponds to the makeup of the specific university department.

The questionnaire included 17 single values which have been also used in a scale of Papastylianous' and Papadimitrious' comparative study (2014) which also included a sample from Greece as well as in studies about the values of young people in Greece (Papastylianou and Papadimitriou, 2009; Lampridis and Papastylianou, 2014). In particular, the single values used were: *honesty, solidarity, competitiveness within ethically acceptable bounds, competitiveness outside of ethically acceptable bounds, altruism, care for others, social independence, emotional independence, economic independence, respect for others, collectivism, individualism, friendship, humanitarianism, assertion, protection of the environment, living in harmony with nature.*

Respondents were asked to rate each single value for importance as 'guiding principles in their lives' on a 5-point Likert scale from 1 (not important)

to 5 (of supreme importance). When necessary, certain values were explained in order to ensure that all participants understand them in the same way.

## Results

Before performing the analysis, we checked if data could be analysed using a one-way ANOVA. The check confirmed its fitness for the analysis of the research data: The independent variable consists of eleven independent groups (years) and there is no relationship between them. Furthermore, there was no significant outliers detected and dependent variable was approximately normally distributed for each category of the independent variable. Homogeneity of variances was tested with Levene's test.

A one-way analysis of variance (ANOVA) was conducted on samples' ratings of the values (Tab. 1). The analysis was significant for *competitiveness within ethically acceptable bounds* [$F(10, 1101) = 2{,}014$, $p = .020$], *altruism* [$F(10, 1094) = 1{,}859$, $p = .047$], *economic independence* [$F(10, 1102) = 1{,}837$, $p = .050$], *respect for others* [$F(10, 1106) = 2{,}128$, $p = .020$], *collectivism* [$F(10, 1106) = 7{,}611$, $p < .001$] and for *protection of the environment* [$F(10, 1106) = 1{,}997$, $p = .031$.

Specifically:

- *Competitiveness within ethically acceptable bounds*: The students enrolled in 2009 ($M = 2.91$, $SD = .919$) and the students enrolled in 2010 ($M = 2.91$, $SD = .902$) scored lower than the students of 2015 ($M = 3.37$, $SD = .899$).
- *Altruism*: The students enrolled in 2009 (M= 2.93, SD= 1.196) scored lower than the students of 2019 (M= 3.31, SD = 1.018) and the students of 2023 (M= 3.48, SD = .903).
- *Economic independence*: The students enrolled in 2008 scored higher ($M = 3.20$, $SD = 1.235$) than the students of 2013 ($M = 2.47$, $SD = 1.359$).
- *Respect for others*: The students enrolled in 2010 scored lower ($M = 4.22$, $SD = .773$) than the students of 2019 ($M = 4.53$, $SD = .662$).
- *Collectivism*: The students enrolled in 2007 ($M = 3.28$, $SD = .990$) scored lower than those of 2019 ($M = 3.90$, $SD = .735$); the students of 2008 ($M = 3.25$, $SD = .921$) scored lower than those of 2015 ($M = 3.68$, $SD = .815$) and of 2019 ($M = 3.90$, $SD = .735$); the students enrolled in 2009 ($M = 3.29$, $SD = 1.070$) scored lower than those in 2019 ($M = 3.90$, $SD = .735$); the students of 2010 ($M = 3.10$, $SD = .987$) scored lower than

those of: 2014 (*M* = 3.62, *SD* =.798), 2015 (*M* = 3.68, *SD* = .815) and 2019 (*M* = 3.89, *SD* = .725); the students enrolled in 2010 (*M* = 3.10, *SD* = .987) scored lower than those of: 2015 (*M* = 3.68, *SD* = .815); 2019 (*M* = 3.90, *SD* = .735) and 2023 (M= 3.62, SD = .930); the students enrolled in 2011 (M= 3,19, SD = .913) scored lower than those enrolled in 2015 (*M* = 3.68, *SD* = .815) and those of 2019 (*M* = 3.90, *SD* = .735); finally, the students of 2012 (*M* = 3.43, *SD* = .966) scored lower than those of 2019 (*M* = 3.90, *SD* = .735).

- *Protection of the environment*: The students enrolled in 2009 (*M* = 3.63, *SD* = 1.158) scored lower than those of 2019 (*M* = 3.68, *SD* = .884) and those of 2023 (*M* = 3.77, *SD* = .955)

Table 1: *ANOVA*

| | | Sum of Squares | df | Mean Square | F | Sig |
|---|---|---|---|---|---|---|
| Competitiveness within ethically acceptable bounds | Between Groups | 20,142 | 10 | 2,014 | 2,133 | ,020 |
| | Within Groups | 1039,757 | 1101 | ,944 | | |
| | Total | 1059,899 | 1111 | | | |
| Altruism | Between Groups | 21,062 | 10 | 2,106 | 1,859 | ,047 |
| | Within Groups | 1239,648 | 1094 | 1,133 | | |
| | Total | 1260,710 | 1104 | | | |
| Economic independence | Between Groups | 32,805 | 10 | 3,281 | 1,837 | ,050 |
| | Within Groups | 1967,515 | 1102 | 1,785 | | |
| | Total | 2000,320 | 1112 | | | |
| Respect for others | Between Groups | 9,974 | 10 | ,997 | 2,128 | ,020 |
| | Within Groups | 518,262 | 1106 | ,469 | | |
| | Total | 528,236 | 1116 | | | |
| Collectivism | Between Groups | 63,754 | 10 | 6,375 | 7,611 | ,000 |
| | Within Groups | 926,393 | 1106 | ,838 | | |
| | Total | 990,147 | 1116 | | | |
| Protection of the environment | Between Groups | 18,903 | 10 | 1,890 | 1,997 | ,031 |
| | Within Groups | 1047,015 | 1106 | ,947 | | |
| | Total | 1065,918 | 1116 | | | |

## Discussion

It is extremely difficult, if at all possible, to completely understand the processes of social change and recognise all the factors causing it. It is equally difficult to interpret with absolute certainty the changes in values and connect them with absolute certainty to the new circumstances formed in a society. Moreover, changes in values need to be studied over time in order to understand how fast the value systems can be restructured on the level of the society and of the individual as well as whether these are short-term or long-term changes.

2008 was the starting point for a series of painful measures that not only disrupted the economy of the country severely, but also caused an immense shock to its citizens, changing their everyday lives and reducing their quality of life. In addition, fear and agony over the future were mixed with emotions of anger towards people and policies. It is also typical that the protest movement that emerged during the most dramatic phase of that period was called the "Indignant Citizens Movement". These circumstances were also deeply felt by young people which seems to be reflected, to a certain degree, in this study.

The students of the sample show a shift with regards to the importance they attach to certain values. An important change is expressed as a further shift towards pro-social values (*altruism, respect for others,* and *collectivism).* This change becomes apparent following the beginning of the crisis and seems to continue up until 2023, thus actually covering the whole period under study. Within a very stressful and insecure framework formed by the implemented policy of drastic cuts and the deep recession of the Greek economy, with continual drops in income and a dramatic decline in employment, young people obviously feel that they can rely on more pro-social values. The more stifling the economic environment becomes, the more their desire to turn to these values seems to strengthen; values which are also more typical of the Greek society. Bourikos and Sotiropoulos (2014), in their study for the period 2010-2013 report that Greece has one of the highest percentages of the population that considers volunteering as important with a particular increase in the percentage in the field of health care (in the period 2010-2011). They also found that there is a trend towards increasing citizen participation in informal voluntary participation at a neighborhood and local community level. The tendency for more collectivity and solidarity in Greece in times of crisis seems also to be confirmed by specific findings of

an international survey carried out in 2020 by the National Center for Social Research in collaboration with World Value Surveys and Prorata entitled "Values in crisis". The research concerned the effects of the Covid-19 pandemic on the values of individuals. It was found that in Greece 38% of the respondents state that in their relationships with other people during the days of the pandemic they encounter from somewhat to greater solidarity with only 8% answering that they find less solidarity around them. In the context of the same research, Akaliyski et al. (2023) found a different trend in Japanese society. Their analyses reveal that the pandemic and the psychological distress experienced are negatively associated with emancipative and secular values, entailing a reversal to traditionalism, intolerance, and religiosity (Akaliyski et al, 2023). To the extent that a tendency from traditional collectivistic to individualistic values is observed during the previous decades in Greece, according to Georgas (1989), at this point we could argue that our survey reveals, in a sense, a form of going back to one's roots, a shift again towards traditional core values.

At the same time, given that these difficult circumstances dramatically reduced the available resources, jobs etc., they drive people more towards competitiveness within ethically acceptable limits, without reinforcing individualism (in particular, the average value for individualism shows a declining tendency throughout this period which, however, is statistically insignificant). In contrast, the value of economic independence seems to weaken during the first years after the violent emergence of the debt crisis. This decrease may express a disappointment on part of young people who considered their future prospects to be fairly ominous and, hence, through their rating, express their pessimism or maybe even fatalism. This is confirmed by other studies carried out in different societies. Lampert et al report in their own research that crises, such as that of the Covid-19 pandemic, cause an emotional shock. In younger people especially are to be found rising levels of pessimism, fear and hostility while positive emotions and hedonism have gone down (Lampert et al., 2021).

As regards the value of the environmental protection, a strengthening tendency is indicated. As we have mentioned in a previous section, empirical findings highlight the connection between pro-social values, such as collectivism, altruism and solidarity, with the importance that individuals attribute to environmental protection. The fact that in our research was found a strength-

ening of specific pro-social values and especially of collectivity, could be a possible explanation for the strengthening of the environmental values of the young people who participated in this research. The further analysis of data also collected during this research will show to what extent the strengthening of environmental values is accompanied by the development of a more positive environmental behavior regardless of the extremely difficult circumstances, the cost-of-living increase, the unprecedented unemployment rate and poverty that expanded to a very large part of the Greek society.

## Limitations and Future Directions

A limitation of the study is that the sample is made up of young people, students of a specific university department where the majority is women. It would be of particular interest to research the changes in certain social values within the constantly changing socio-economic framework, on a wider scale (e.g. Greek society). Thus, even though this study contributes to mapping certain tendencies, we obviously could not, nor did we intend to, generalise these conclusions for the Greek society as a whole. Moreover, as Greek society is not homogeneous, it would be important to research any potential differences based on income data but also on the place of residence of the students, i.e. whether they come from urban or rural areas where values were more traditional and collectivist. Especially as regards environmental issues, it is important to research whether, under these circumstances, the environmental attitudes as well as the environmental behavior change over time along with their correlations with the changes in value structures.

## Conclusion

As we already know, special circumstances may cause the restructuring of a value system. Based on the findings of this research, the economic crisis that drastically impacted and still continues to deeply influence the life of people in Greece, caused the importance of certain values to increase, while at the same time others lost part of their importance in the conscience of the young people in our sample. Obviously, we cannot know whether these are temporary tendencies which will be reversed, as long as the socio-economic circumstances in Greece improve, or if these are rather long-term changes.

We can interpret these shifts based on the main characteristics and the values of this specific society and by taking into account the impact of the circumstances formed in particular since 2008. In any case, the changes discovered have more of a form that reinforces certain core values rather than one that shapes different tendencies and restructures the main characteristics of the value structure of the Greek society.

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**Research Notes**

# Multiple Crises and Human Capital: Development aspects in the Sahel region

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## Abstract

The Sahel region is admittedly one of the regions associated with the highest incidence of multiple and simultaneous crises in sub-Saharan Africa and globally. The typology and the combination of multiple crises taking place vary among the Sahel countries but also among different periods of time. Sanitary or nutritional crises, economic downturns or extreme weather conditions, exert a direct or indirect impact on human development and the quality of human capital along the Sahel region, often leading to persisting security crises, such as civil conflicts or terrorist attacks. At the same time, investments in human capital, when existent, can potentially keep local populations engaged in creative and productive activities, instead of joining paramilitary groups or terrorist organizations, in order to urgently cope with acute poverty due to the above multiple crises. The aim of the present study is to highlight the different aspects and factors of instability

in the Sahel region, by evaluating a range of crisis-related factors of different nature that potentially hinder any improvements in human capital.

**Keywords:** *human capital, crises, Sahel*

## Introduction

The word "Sahel" in Arabic stands for "shore", covering the geographical area between the tropical zone of Africa and the Sahara Desert. The Sahel region geographically consists of two groups of African countries, namely those located along the "neck" of the African continent, including Senegal, Gambia and Guinea in the western part and the populous states of Nigeria and Cameroon, while the second group involves the G5 Sahel countries, namely those located largely along the southern part of the Sahara Desert (Burkina Faso, Chad, Mali, Mauritania, Niger). Multiple crises plague the Sahel states overtime, stemming from global or regional economic crises, weather extremes that harm agricultural output and lead to acute food security crises, or even sanitary crises that may exert a permanent negative impact on maternal and infant health, on human development and finally threat the populations' creativity and employability.

Human development presupposes a healthy and long life, facilitating access to both social institutions, such as healthcare and education, and economic resources. In this context, human development can lead to reducing the "opportunity cost" of participating in education and the labor market, compared to engaging in armed action. Investing in human development can prevent security crises or even the violent displacement of local populations from their homelands. The present study aims exactly to highlight the different aspects of human capital development in the Sahel region, through an effort to trace out any potential mechanisms of increasing economic resilience in the region. To this end, it becomes of primary importance to assess the factors that may hinder human development in Sahel, mainly related to the multiple crises' interplay that plague the region overtime.

We therefore support the importance of a proactive approach, in the sense of diagnosing opportunities to strengthen the resilience of local human resources in the area under study, to the multiple crises occurring over time. Improving living conditions and resilience of local populations would be

critical in limiting involuntary migration and refugee flows, given a) the risks to which people along refugee corridors are often exposed, b) the excessive economic sacrifice of refugees towards their traffickers, but also c) the negative impact of peoples' confinement in refugee camps on the psychology and creativity of refugees, regardless of gender and age. Given this complex of factors determining the populations' life in Sahel countries, we support the idea that investments in human capital should be placed at the heart of a holistic response to the multiple and interacting crises in Sahel.

The remainder of the paper is organized as follows. Firstly, Section 2 aims to delve into the set of multiple crises, the combined effect of which harm the development of human resources in multiple ways. Section 3 provides a brief overview of the beneficial effect of investing on human capital. Section 4 discusses the ongoing stakes during the combined outbreak of multiple crises and Section 5 provides some empirical findings on the effect of crises on human development and the interplay between some crisis-related factors. Finally, Section 6 discusses eventual policy implications and concludes the paper.

## Multiple crises in the Sahel region

Dependency theory has already for more half a century described the relationship between developed and underdeveloped countries (Prebisch, 1949; Dos Santos, 1970; Amin, 1974), such as several Sub-Saharan countries, and its subsequent impact at the economic, social and political field. This conceptual framework sets at the core of the analysis the need for the underdeveloped states of the South to break the dependency ties with the developed countries of the North, in order for the first to tackle with the multiple crises they face, due to either exogenous or endogenous factors, or even a combination thereof.

In this context, it is necessary to consider the main axes of problems: certain aspects of population health status, the influence of climate change up to main critical resources and human being conditions, along with the impact of local conflicts in human life and economic activities. For this reason, several indicators are taken into consideration. It should be mentioned that this choice is shaped by the availability of time series data for the countries under study, while at the same time, the proposed indicators are systemat-

ically employed along the relevant literature. Some of them are taken into account for estimating the global multidimensional poverty index (MPI), or even others are included for evaluating the achievement - or not - of the 17 Sustainable Development Goals (SDGs).

Among the main causes of underdevelopment in the African continent, and in particular in sub-Saharan Africa, the impact of weather conditions cannot be denied. Weather shocks that significantly affect the average well-being of rural households, are typically manifested by frequent droughts (e.g. Ethiopia) and by extreme rainfall, which leads to the loss of livestock and agricultural production, as well as the spread of some commonly found fatal diseases (Wu et al., 2016; Khan et al., 2019). In this context, the access to water resources plays a determinant role both in terms of quality of life and with reference to economic activity. The baseline water stress represents the share of water demand (domestic and industrial irrigation and livestock consumptive and non-consumptive uses) to available renewable water supplies (surface and groundwater supplies), among others (Harhay, 2011; Du Plessis, 2019). Higher values imply higher competition among users, as is the case for Niger, Mauritania, and Senegal (see Table 1), but water could be also considered as a potential cause of conflict of interests between neighboring countries.

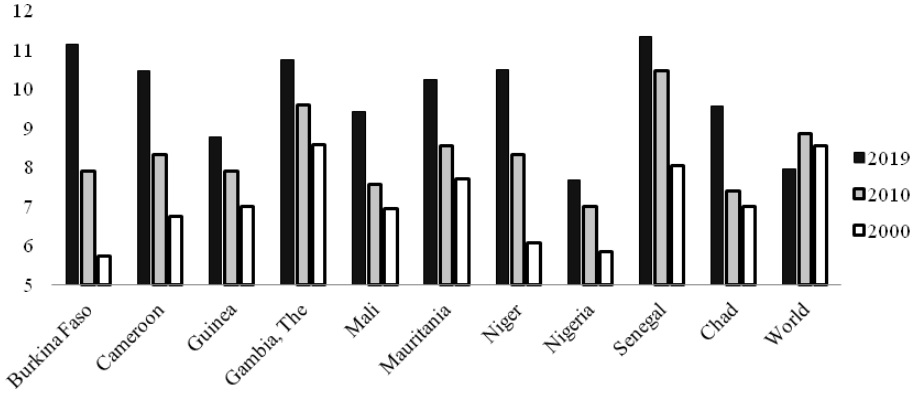
Table 1. *Baseline water stress index (Aqueduct 4.0)*

| Low (0.0-0.2) | Low-medium (0.2-0.4) | Medium (0.4-0.6) | Medium-high (0.6-0.8) | High (0.8-1.0) |
|---|---|---|---|---|
| Cameroon, Chad | Burkina Faso | | Mauritania | Niger |
| Gambia, Guinea | | | Senegal | |
| Mali, Nigeria | | | | |

**Source:** World Resources Institute (2024) https://www.wri.org/

To the same extent, the high degree of racial and linguistic segmentation of local tribes and populations, even inside the countries' national borders, along with the "violent" imposition of these national borders during the independence process (Griffiths, 1986; Ikome, 2012), are also partly responsible for any war and civil conflicts that may occur in sub-Saharan Africa. The incidence of death by injury increases over time for all Sahel countries, while during the last two decades, in global level, this probability has decreased. About one in ten people in the Sahel region dies due to injury (Chart 1).

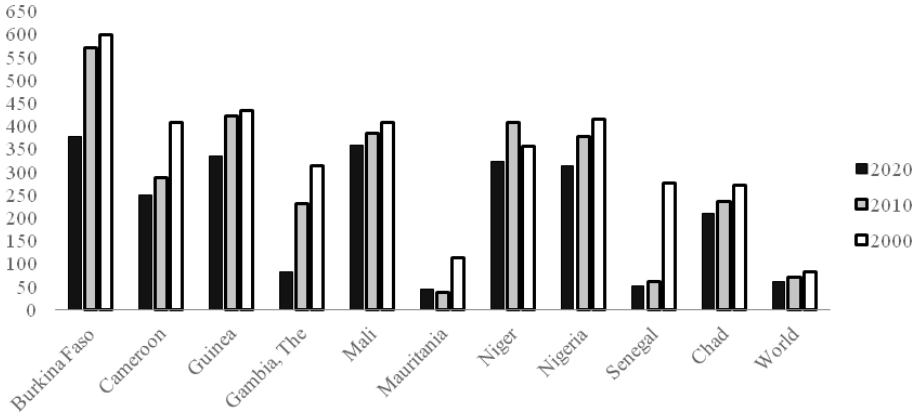
**Chart 1.** *Cause of death, by injury (% of total)*




**Source:** World Development Indicators (SH.DTH.INJR.ZS)

Access to healthcare and vaccines is also considered crucial, in order to cope with high maternal and infant mortality rates in several countries of Sub-Saharan Africa. The higher incidence of diseases such as tuberculosis, malaria or other communicable diseases (Chart 2), worsen the human living conditions and, apart from the direct impact on mortality, affect the longevity and the creativity of local populations.

**Chart 2.** *Incidence of malaria (per 1.000 population at risk)*




**Source:** World Development Indicators (SH.MLR.INCD.P3)

In this combination of underdevelopment factors, it remains difficult to isolate the decisive role of centuries-old colonialism and the neo-colonial

system, as the latter being manifested from the independence of African states onwards. Political interventions, the transnational companies' economic activities, monoculture in agricultural production are some of the most typical ways of neo-colonial interventionism in sub-Saharan African states. Neo-colonial interventionism practices can be often blamed for frequent internal conflicts, the rise of terrorism and the action of paramilitary organizations (for example, Dermitaş, 2023; Obikwelu et al., 2023).

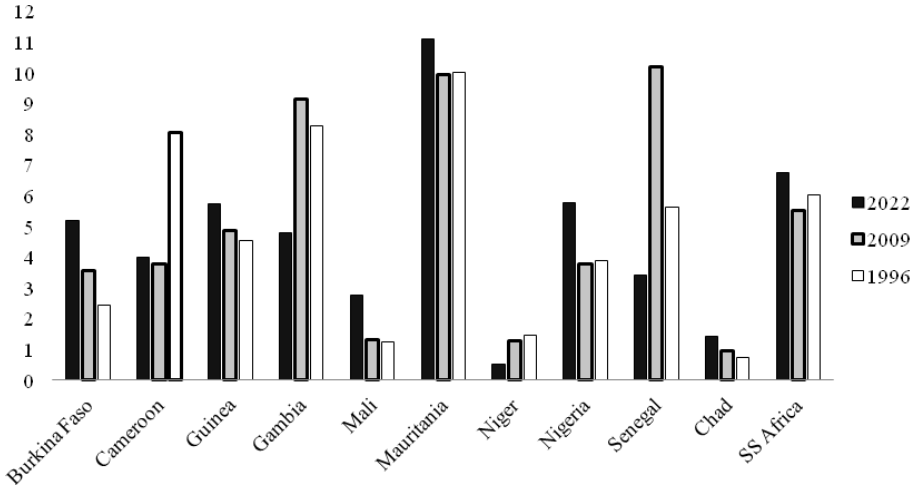
## Investments in human capital

Food crises often occur as a result of climate conditions (droughts, extreme weather shocks), economic crises or war conflicts (security crises), or just a combination of the above. The index representing the share of the population living on less than 2.15 dollars per day (formerly 1 dollar and more recently 1.9 dollars per day) is the main indicator of absolute poverty (World Development Indicators), employed to assess the incidence of acute poverty, mainly in the less developed countries. International organizations such as the Food and Agriculture Organization (FAO) of the United Nations estimate a threshold of caloric sufficiency from food intake in the majority of countries worldwide. To this indisputable usefulness of the above indicators (World Bank, 1986; United Nations, 2015; FAO, 2023), there also exist some points of criticism in terms of both quantitative and qualitative assessment of nutritional efficiency.

These indicators illustrate, in quantitative terms, the availability (or not) of the minimum resources, necessary for human survival. To this point, Chouliaras (2005) refers to the extent of a rather "silent" state of hunger, as defined by the absence of several vitamins and trace elements in the dietary routine of persons, arguing that if the lack of quality nutrition is taken into account, the problem of malnutrition becomes even more critical. As to the question of whether this quantification of food availability is accurate in countries such as those in the Sahel region, the task of estimating this caloric threshold proves to be a difficult undertaking, to the extent that part of the individuals' or households' transactions for purchasing food are not included in the context of the official economic transactions. And this is true especially in the case of the less developed countries, where household production and "shadow" economy constitute a non-negligible part of the

aggregate economic activities. But this exchanging capability by the part of local populations, according to Amartya Sen (1981), often justifies the paradox of lacking access to food, despite its availability. The interaction between these multiple types of crises can be seen through a wide range of related examples. Security crises and the outbreak of armed conflicts, within or between different countries, are often responsible for infrastructure damage to agricultural equipment and infrastructure, losses in both plant production and livestock, which in turn causing food crises (De Waal, 1997).

**Chart 3**. *Unemployment, total (% of total labour force) (modelled ILO estimate)*

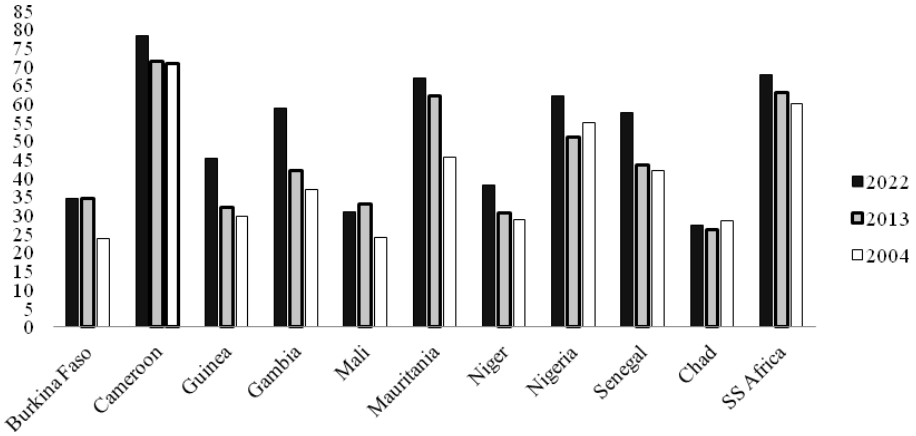



**Source:** World Development Indicators (SL.UEM.TOTL.ZS)

Evaluating literacy rates provides a general idea of the local population's access to basic education (Chart 4), and further emphasizing the educational performance of younger adults (Chart 5). Especially for the adult literacy rate, it can potentially capture the long-term persistence of the incidence of high illiteracy. Compared to the aggregate literacy rate for sub-Saharan Africa, few of the Sahel countries show a similar performance. Especially for 2022 estimates, Cameroon seems displays as the only country with higher literacy rate than sub-Saharan area as a whole, even though Mauritania also seems to approach the average (67% versus the average of 67.7%). Mauritania is also an exception to the rest of the G5 Sahel countries, given that the literacy rates in Burkina Faso, Mali, Niger and Chad appear consistently lower than

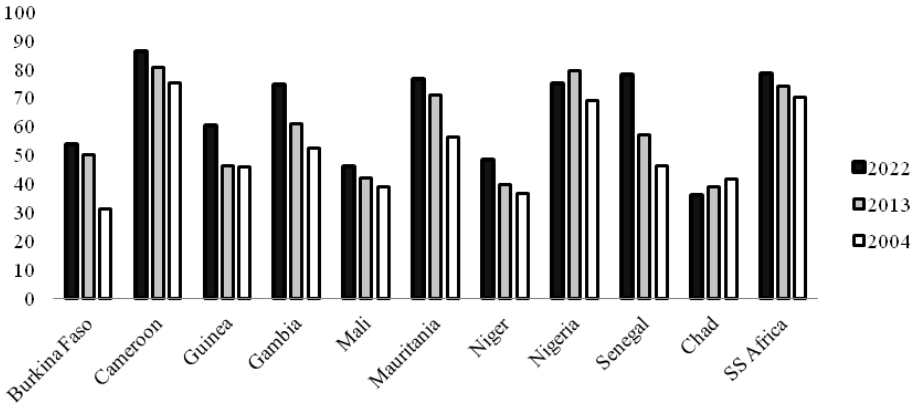
that of all other Sahel countries[1]. Similar are the findings when the younger adults' literacy rates (15-24 years old) are examined separately.

Chart 4. *Literacy rate, adult total (% of people ages 15 and above)*




Source: World Development Indicators (SE.ADT.LITR.ZS)

Chart 5. *Literacy rate, youth total (% of people ages 15-24)*

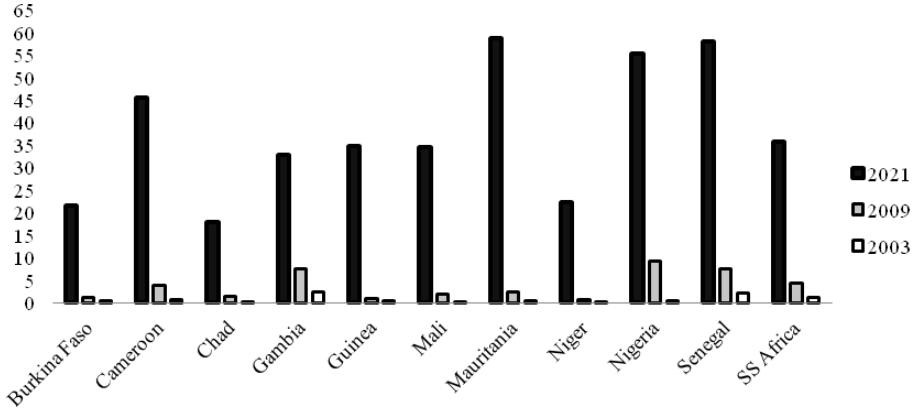



Source: World Development Indicators (SE.ADT.1524.LT.ZS)

Towards the individuals' participation in education and training, apart from the students' enrolment in the education system also plays a significant role by improving the terms of access to information. Access to information exerts an additional enhancing effect on the students' development

of cognitive skills, but also on the economic activity of individuals (as, for example, the ease of searching for a job, access to more distant markets for selling agricultural products). Expanding internet access in the Sahel region has indeed a very short historical background, still being quite limited even at the beginning of the last decade. Since then, there has been a noticeable improvement overall for sub-Saharan African states (at least one out of three has access in 2021), which becomes even more profound mainly among countries that do not belong to the G5 Sahel (except for Mauritania). Between 2009 and 2021, the increase in Internet use is wide for the populous states of Nigeria and Senegal (from 9 to 55% and from 8 to 58%, respectively), with rather similar performances for Cameroon, while the most significant improvement is recorded in Mauritania, with just 2% having access in 2009 and almost 58% in 2021 (Chart 6). As regards the rest of the G5 Sahel countries, the access to Internet scores varies significantly: In the best case (Mauritania), only two-third of the population has access to the Internet.

**Chart 6.** *Individuals using the Internet (% of population)*



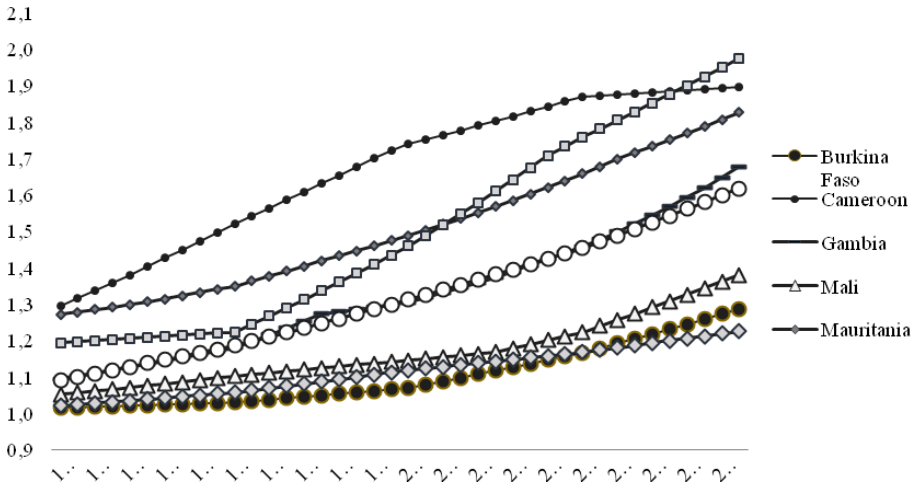

**Source:** World Development Indicators (IT.NET.USER.ZS)

It should also be noted that this specific index does capture neither a daily or even weekly access to Internet, nor a stable connection to it. At the metadata level, Internet use refers to at least one time that a person used the Internet in the last three months – and from anywhere in the world. Thus it is understood that a daily or even weekly – regular, in any case – use of the Internet may refer to even smaller shares of the population, and therefore the assessment of access to information should be approached at least with

caution. However, it cannot be over looked that the above is an indicator of access to information, an indicator which evaluates the degree of information asymmetries, for which data are available even for the 1990s.

The measurement of the quality of human capital has occupied the international literature and the empirical studies from time to time, some of which are devoted to introduce composite indicators, such as the Human Development Index (HDI) and the Human Capital Index (Chart 7). As regards the latter, the human capital index per worker is also related to the average duration of enrolment in the education system, being based on years of schooling and returns to education[2]. Relevant data are available from the Penn World Table (Feenstra et al., 2013).This very common human capital index is based on measuring the years of schooling and the returns to education, with the higher values corresponding to higher human capital levels, which in our study mainly refer to the Sahel countries except some of the countries ofthe G5 group. The upward trend in the case of the corresponding index for Nigeria, especially from 1990 onwards, reflects the significant progress made with regard to the social infrastructure improvements in the country during the 1970s (Ogun, 2010; Olufemi et al., 2013). Unfortunately, there are no statistical data for Chad and Guinea, which leads to the search for alternative indicators over longer periods of time, such as the Human Development Index, which will be discussed below.

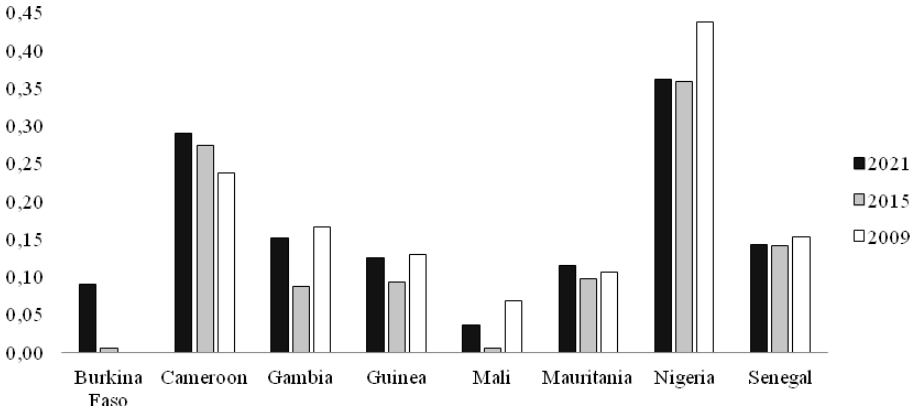
**Chart 7.** *Human Capital Index*




**Source:** Penn World Table 10.1

One of the composite indicators assessing the quality of human capital is the recently introduced Frontier Technological Readiness Index (FTRI, Chart 8), an index made up of five components, one of which represents the level of skills development. More specifically, the FTRI assesses i) ICT deployment (e.g. ICT infrastructure), ii) skills development (acquired in education or in workplace), iii) the level of R&D activities (e.g. publications and patents), iv) the degree of industrial activities (e.g. high-tech manufacturing), and v) access to finance (mostly for the private sector). As previously mentioned, the skills development component (Chart 8) takes into consideration the expected duration of participation in the education system as well as highly skilled employment (% of the labour force), varying between zero (minimum skills) and the unity (maximum skills).

**Chart 8.** *Frontier Technology Readiness Index (FTRI) – Skills development*




**Source:** UNCTAD (UNDP&ILO)

No data are available for Chad and Niger, a fact that predisposes to extremely low performance in the countries, as is the case for the rest of the G5 Sahel countries. It becomes clear that countries such as Nigeria and Cameroon achieve to maintain consistently higher levels of skills development, as this is also one of the preconditions for upgrading national economies' technological readiness. The worst performers in this case are mainly the G5 Sahel member states.

## Multiple crises and on going stakes

The interplay between multiple crises is a complex and often indistinct process, varying between different countries, as well as in the case of Sahel (Table 2). Losses of household income, limited access to credit can stimulate a person's choice to be engaged in armed groups, they often limit the access to health infrastructure or vaccines, or they even lead to malnutrition (caloric or "silent"). Sharp fluctuations in food and agricultural product prices can only intensify the devastating impact on local populations' living conditions, as a result of the absence of robust economic institutions. Security crises in turn, apart from the evident effect on human life, engage people in non-productive activities, lead to significant damages to production systems (e.g. equipment and infrastructure related to agricultural production), health systems (e.g. looting of ambulances and health centres), resulting in higher exposure to climatic and food insecurity shocks. Sanitary crises can also stimulate vulnerability to climatic shocks, while in terms of human resources, bad health leads to limited access to education and lower levels of employability, without underestimating the incidence of growing unrest during any virus outbreaks.

Expanding livestock production has been considered as a strategy of capital accumulation (Hart and Sperling, 1987), especially in the case of rural households. Climatic crises can manifest either as prolonged droughts or extreme rainfall, exerting a direct impact on crop and livestock production. This implies losses in the disposable income of rural households which, in the absence of financial liquidity due to the partial or total loss of production, are forced to sell or even exchange assets (e.g. livestock) to secure their current consumption needs. The urgent need to "liquify" available assets, such as livestock, functions as a mechanism for emergency financing of the rural households' current consumption needs, in the absence of formal (banking system) or informal institutions (lending from family relatives or from social networks). In this context, the availability of livestock, for example, can be seen both as a "saving" and "liquidating" mechanism during productive or non-productive years, respectively.

The link between climatic factors and the spread of various diseases cannot be underestimated, especially in the case of Sahel, taking also into account the insufficient social infrastructure, such as health institutions. In

this context, food crises lead to famines and losses of human lives, higher exposure to diseases, limited working efficiency, lower incomes and eventually the engagement in armed forces, especially in the absence of state institutions. In this context, it becomes evident that further investment inhuman capital is needed in order to mitigate local populations' vulnerability in times of crisis.

Table 2. *The multiple crisis interplay and incidences*

| Crises | Economic | Security | Sanitary | Climatic | Nutritional |
|---|---|---|---|---|---|
| **Economic** | Expansion of "shadow" economy and other criminal economic activities (e.g. drugs) | Loss of income and engagement in armed conflict | Lack of access to vaccines, further deficiency of medical care | Insufficient infrastructure for water management | Malnutrition (caloric or "silent" hunger, Strong fluctuations in food and agricultural product prices due to market fragmentation |
| **Security** | Damages to equipment and infrastructure in agricultural production | Youth criminality | Armed groups and looting of health centres | Growing risks of climatic shocks (e.g. droughts) | Loss of livestock and plant production |
| **Sanitary** | Limited working efficiency and limited income | Limited access to sanitation, higher exposure to disease outbreaks, growing unrest | | Low economic resilience due to climatic shocks | Bad health and limited employability restrains access to food |
| **Climatic** | Loss of livestock and agricultural production, losses in household income | Water or food stress and conflicts over access to natural resources | Outbreak of malaria and other diseases | Further environmental degradation | Loss of livestock and plant production |
| **Nutritional** | Bad health and lack of access to education, limited employability | Widespread hunger and joining armed forces to sustain income losses | Food insecurity and higher exposure to illnesses | Famine, loss of livestock | Long term health burden |

## Empirical findings on the factors affecting human development

As already mentioned, the aim of the present study is to highlight the different aspects and factors of instability in the Sahel region, by evaluating a range of crisis-related factors of different nature that potentially hinder any improvements in human capital. The human development index (HDI) is a

commonly introduced indicator that assesses improvements in human welfare, in terms of long and healthy lives, access to knowledge and decent living conditions. It is calculated as the geometric mean of normalized indices for each of three dimensions, namely the health dimension which is assessed by the life expectancy at birth, the education dimension which is measured by the years of schooling and, finally, the standard of living dimension, which is assessed by the gross national income per capita levels at the national level and at a yearly basis[3]. It is an index that provides a generalized idea of human welfare in a given country. The use of HDI instead of HCI facilitates the task to conduct cross-country or time-series comparisons, data for which is available for the vast majority of countries from 1990 onwards. To this end, the objective of the present analysis is to evaluate the combined effect of multiple crises or disadvantages on human capital, as well as to trace the interactions between them, during the last two or three decades.

With regard to the latter point, we carry out a statistical analysis by introducing a linear regression model. The regressions are first performed over a 30-year horizon (1991-2019) and then over the last twenty years (2001-2021), considering that data for some of the explanatory variables are only available for 2000 onwards. The sample referring to the period between 1991 and 2019 contains 249 observations, while the corresponding one for the period 2001-2021 includes a total of 208 observations.

The dependent variable of the linear regression model represents the variations in the human development index in country *i* and in year *t*. As regards the explanatory variables, each of them is included in a set of crisis-related factors (Table 3). Firstly, the impact of sanitary crises is reflected here by the incidence of malaria by country and per 1000 habitants at risk, based on the World Bank data (World Development Indicators). An alternative indicator that could be employed as well, capturing the overall child mortality pattern, as well as access to medical care in the Sahel countries, is the under-five infant mortality rate. Relevant data are also available as far back as 1990; however, this specific indicator capturing the extent of infant mortality was finally excluded from the analysis due to collinearity issues with other explanatory variables. For this reason, only the malaria-related variable was retained to capture the effect of sanitary crises.

$$hdi_{it} = \beta_0 + \beta_1 water_{it} + \beta_2 land_{it} + \beta_3 pop_{it} + \beta_4 unemp_{it} + \beta_5 inet_{it} + \beta_6 oda_{it} + c \quad (1)$$

The impact of *extreme weather conditions* is represented by an indicator reflecting the availability of renewable internal freshwater resources per capita (World Development Indicators – World Bank). The advantage lying behind the employment of this variable is exactly the estimation of per capita freshwater availability, a factor that is even more critical along the Sahel countries, which has also been taken into consideration in previous empirical studies (for example, Karkanis, 2019).

Table 3. *Variable names and definitions*

| Type | Variable | Definition | Database |
|---|---|---|---|
| Dep. Var. 1 | $hdi_{it}$ | Human Development Index (0-1) | UNDP |
| Dep. Var. 2 | $agva_{it}$ | Agriculture, forestry, and fishing, value added per worker (constant 2015 US$) | World Bank |
| Sanitary | $malaria_{it}$ | Incidence of malaria (per 1,000 habitants at risk) | World Bank |
| Climatic | $water_{it}$ | Renewable internal freshwater resources per capita (cubic meters) | World Bank |
| Nutritional | $land_{it}$ | Arable land (hectares per person) | World Bank |
| Nutritional | $food_{it}$ | Average dietary energy supply (%, 3-year average) | FAOSTAT |
| Nutritional | $pop_{it}$ | Population growth (annual %) | World Bank |
| Economic | $unemp_{it}$ | Unemployment rate (% of total labor force) | World Bank |
| Economic | $inet_{it}$ | Individuals using the Internet (% of population) | World Bank |
| Economic | $oda_{it}$ | Net ODA received (% of GNI) | World Bank |

The effect of food crises is represented by three alternative or complementary explanatory variables. First of all, a variable for reflecting the average dietary energy supply, based on the FAOSTAT data, is introduced into the model. More specifically, this variable represents the degree of caloric supply in terms of food consumption, per country and year, as a percentage of the minimum caloric supply, necessary for the survival of the population. It is calculated as a three-year average (three consecutive years), which facilitates the elimination of quite likely sharp fluctuations overtime, given the high incidence of extreme droughts in the Sahel region. The second variable rep-

resents the percentage of arable land, compared to the total geographical area of a country. A positive link between the share of arable land and the human development index (HDI) would be easily expected, even though this cannot be taken for granted in areas where a large proportion of land is occupied by the Sahara Desert. The third variable finally examines the Malthusian hypothesis, under which any demographic pressures are expected to exert a negative impact on natural resources and lately on human development. In order to capture this effect, we introduce a variable for representing the population growth rate (%).

At the level of economic performance, three proxies are also introduced in the model, two of which were previously presented (Charts 3 & 6), namely unemployment levels (% of total labour force), according to the ILO estimates, as well as the share of individuals using the Internet (% of total population). In addition, they are both measures of access to employment and access to information, respectively. Especially with regard to the share of internet users ($inet_{it}$ variable), it additionally reflects the degree of rural households' access to economic information, access to neighbouring markets in order to share their products. Several empirical studies have already attempted to assess the impact of mobile phone provision to rural households in LDCs (Least Developed Countries) on their economic performance (Maetal, 2018; Parlasca, 2021; Rajkhowa and Qaim, 2022). The third variable refers to the net official development assistance (ODA) received, as a share of gross national income. The latter ($oda_{it}$ variable) reflects the Sahel countries' dependency from external financial aid, compared to their domestic economic output, but it could also reflect, to some degree, the extent to which neo-colonial ties are maintained.

Moving further, the same linkages between the crises –related factors and human development are examined for the period between 2001 and 2021. Therefore, the number of observations and, as a result, the number of explanatory variables are further delimited (Equation 2), also due to collinearity issues or even to statistical insignificance reasons. It should be stressed that any efforts to extend the study period, even at the national level, lead to limited data availability, which is often due to the local statistical services' or international organizations' inability to collect data. For example, estimations on the poverty headcount ratio (population share below the international poverty line) are not necessarily available, for the same year, for all African countries.

$$hdi_{it} = \beta_0 + \beta_1 malaria_{it} + \beta_2 land_{it} + \beta_3 food_{it} + \beta_4 pop_{it} + \beta_5 unemp_{it} + \beta_6 inet_{it} + c \quad (2)$$

In order to examine the statistical significance of the linkages between the different crisis-related factors and the quality of human resources, different statistical methods are employed that are commonly introduced in the relevant literature. For each of the aforementioned equations we employ the most typical method for calculating linear regression models, such as the ordinary least squares (OLS) method. As a robustness check, the generalized least squares (GLS) method is also employed (both random and fixed effects) and, finally, the Poisson Pseudo Maximum Likelihood (PPML) estimator. Both GLS and PPML estimations are commonly employed to improve estimation efficiency, by dealing with heteroscedasticity, which is sometimes present in time-series data, or even serial correlation (Santos Silva and Tenreyro, 2006; Taboga, 2021; Fang et al., 2023).

At the level of the empirical results (Table 4), the findings of the first regression model (Equation 1) support the validity of our methodological choices in most of the cases. The results of the first analysis suggest that countries with greater water stress are those associated with higher human development indexes, as confirmed in Table 1 (e.g. Senegal, Mauritania), as well as by the negative sign of the coefficient related to the availability of internal freshwater resources per capita. Quite similar findings can be traced with regard to the relationship between the share of arable land and the quality of human capital. A negative coefficient sign is confirmed in OLS, GLS (random effects) and PPML estimations, except when taking into account fixed effects[4].

As regards the Malthusian hypothesis, it seems not to be confirmed in this case. On the contrary, GLS (FE) estimations provide a positive relationship, which implies that, *ceteris paribus*, the higher the population growth rates, the higher the HDI value. It should be noticed though that the factors affecting population growth rates (fertility and mortality patterns) are, by definition, characterized by greater inertia and, therefore, by smaller fluctuationsin a shorter time horizon such as the HDI. As previously mentioned, the calculation of an index, such as the latter, implies taking into account the life expectancy levels, the period of schooling, but also an index of greater inertia,

such as the per capita gross national income. However, this demographic indicator has been already employed in the relevant literature, for example when it comes to the effect of demographic pressures on food security (Subramaniam et al., 2019).

In brief, it is possible to detect the following pattern: Countries with relatively higher human development indexes are characterized by relatively lower levels of freshwater availability per capita, limited arable land compared to their total geographical area. As far as the latter three explanatory variables are concerned, the same countries seem to record higher unemployment rates, a trend which is confirmed by the positive coefficient sign of the corresponding variable, being statistically significant for both OLS and PPML estimations. At this point, we believe that for some of the Sahel countries, namely the G5 group, the respective unemployment rates may be subject to distortions due to the failure of the bureaucratic mechanisms to fully register the extent of unemployment. To conclude, the unemployment rates in the countries of the G5 Sahel may be biased to the relative inefficiency of national bureaucratic institutions and the spread of the "shadow" economy. Countries such as Niger, Mali or Chad, consistently record the lowest unemployment rates among the ten Sahel economies (Chart 3).

Table 4. *Human Development Index as dependent variable, 1991-2019*

| | OLS | GLS | GLS | PPML |
|---|---|---|---|---|
| Variable | | RE | FE | |
| $water_{it}$ | -0.003** (2.05) | -0.103*** (12.23) | -0.216*** (29.51) | -0.006 (1.29) |
| $land_{it}$ | -0.093*** (7.95) | -0.083*** (4.60) | 0.034*** (2.77) | -0.300*** (10.12) |
| $pop_{it}$ | 0.003 (0.55) | 0.005 (1.20) | 0.004* (1.69) | 0.023 (1.19) |
| $unemp_{it}$ | 0.007*** (6.58) | 0.001 (0.76) | 0.001 (1.11) | 0.015*** (6.36) |
| $inet_{it}$ | 0.004*** (11.94) | 0.002*** (7.80) | 0.001 (0.33) | 0.007*** (8.35) |
| $oda_{it}$ | -0.007** (10.73) | -0.004*** (7.20) | -0.002*** (5.16) | -0.018*** (8.12) |
| N | 249 | 249 | 249 | 249 |
| R-squared | 0.791 | 0.882 | 0.941 | 0.770 |
| VIF | 1.55 | 1.55 | 1.55 | 1.55 |

**Note:** *, **, *** denote significant levels at 1%, 5% and 10%, respectively. Standard errors in parentheses.

The findings also demonstrate a negative relationship between the extent of official development assistance (ODA) received and the HDI levels. This is not to say that countries with comparatively higher financial aid dependency did not manifest a higher reliance on development assistance in the past. In each of the four regressions, the statistically significant findings confirm the beneficial effect of external financial aid, at least temporary. Higher HDI scores come along with lower dependency on development assistance. Finally, expanding Internet access turns out to exert a significant positive effect on human capital improvements, the sign of the related coefficient ($inet_{it}$ variable) being positive in three out of the four regressions.

Clearly, this finding does not make any surprise. Access to internet in countries where it cannot be taken for granted, such as the Sahel group, implies facilitating access to distance education and training, which also acts as a precondition in order to increase the employability status of the working population. It entails access to neighboring or even distant labor markets, which allows younger people or family heads who urgently seek for new employment opportunities, in order to ensure their livelihood and the survival of their families. Access to information or, in other words, mitigating information asymmetries, as also mentioned in the economic literature, can reduce the "opportunity cost" of seeking for a job, instead of being engaged in paramilitary groups.

A similar beneficial effect can be observed when it comes to agricultural producers, especially in the poorest countries worldwide. Providing access to internet, which can be achieved by providing cell phones, for example, to agricultural producers, can facilitate their access to economic information. Agricultural producers can be informed about the existence of alternative nearby markets where they could sell their products, in case their product supply exceeds local demand. Consumers may also seek for products in alternative nearby markets at more affordable prices, especially when weather extremes harm local production and thus cause abrupt price fluctuations on the products desired. Lately, access to information facilitates the decision for migration, thereby alleviating any demographic pressures at the local or even national level.

At this point, an alternative dependent variable is considered, which aims to assess the effect of the same crisis-related factors on efficiency in agricultural production, which employs the largest share of the working

population in Sahel. The value added in agriculture production, employed here as a dependent variable, reflects the impact of integrating technological developments and innovation (e.g. advanced agricultural equipment, smart farming)on improving economic efficiency in agriculture. This upgrading of farming systems implies human capital development and investments in road and communication infrastructure, but it also depends on the supply of natural (water and land availability) and financial resources (e.g. development assistance).

Table 5 summarizes the findings of the OLS, GLS, and PPML estimations, most of which obtain a relatively high interpretative value (R-squared > 0.7). It becomes apparent that all four estimations provide the same coefficient signs, that is, similar linkages among than those described above. More specifically, countries associated with higher added value levels per worker in agricultural activities are those with a comparatively limited stock of arable land, apparently higher unemployment rates and relatively limited reliance on external financial aid.

The enhancing effect of increasing Internet access on higher added value in agriculture is also evident, as confirmed by the positive coefficient sign of the $inet_{it}$ variable. What is more striking being the fact of the negative relationship between the per capita availability of water resources and the dependent variable (Table 5). It therefore appears that, at least for the 30-year analysis (1991-2019), countries associated with higher HDI scores and higher value added per worker in agriculture are characterized by lower shares of arable land – a fact that seems to be reflected in lower per capita water availability levels – and apparently higher unemployment rates.

Limiting further the time period under study to the last twenty years it allows us to incorporate explanatory variables in the regression and re-examine the reliability of previous findings. Two additional factors are integrated, namely a proxy for testing the effect of the incidence of malaria ($malaria_{it}$ variable), as well as the corresponding one for nutritional security ($food_{it}$ variable). It should be first noted that the previous results are mostly confirmed – along with slight variations with regard to the population growth variable – for the last thirty years. Once more, the relatively high interpretative value of the estimations can be manifested by the high R-squared values.

Table 5. *Agriculture, value added per worker as dependent variable, 1991-2019*

| | OLS | GLS | GLS | PPML |
|---|---|---|---|---|
| Variable | | RE | FE | |
| $water_{it}$ | -0.257*** (17.03) | -0.236*** (4.54) | -0.402*** (3.79) | -0.035*** (18.87) |
| $land_{it}$ | -1.609*** (14.84) | -0.733*** (5.01) | -0.406** (2.27) | -0.241*** (15.95) |
| $unemp_{it}$ | 0.034*** (3.71) | 0.030*** (2.89) | 0.023** (2.15) | 0.004*** (2.86) |
| $oda_{it}$ | -0.013** (2.06) | -0.008* (1.68) | -0.005 (1.02) | -0.002** (2.07) |
| $inet_{it}$ | 0.015*** (5.42) | 0.008*** (4.54) | 0.006** (2.48) | 0.002*** (4.42) |
| N | 249 | 249 | 249 | 249 |
| R-squared | 0.789 | 0.706 | 0.425 | 0.791 |
| VIF | 1.48 | 1.48 | 1.48 | 1.48 |

**Note:** *, **, *** denote significant levels at 1%, 5% and 10%, respectively. Standard errors in parentheses.

The coefficients of the additional proxies obtain the expected signs. The negative sign of the $malaria_{it}$ variable indicates the detrimental effect of sanitary crises on human development. This also implies the necessity to expand local populations' access to medical care and vaccinations. It also considered crucial for households to be helped abandon any prejudices and local beliefs about the effect of vaccines on the human body, which are also existent, to a lesser extent, in households of developed countries. In addition, access to health centers and medical care in general cannot be taken for granted, as is the case in the so called developed world. It often involves traveling long distances, with rudimentary means of transport on unpaved roads, a situation that discourages local and mostly rural populations from frequent contact with medical staff and health care.

As regards the effect of nutritional crises to human capital, all four regressions, as expected, statistically confirm the positive impact of higher food security levels on human development ($food_{it}$ variable, Table 6). Food availability cannot be taken for granted in periods of extreme weather conditions (e.g. droughts), in areas with high market segmentation and consequently difficulties in searching for alternative markets to acquire all necessary food products. Malnutrition exerts a direct impact on the development of the human body, thus making it more vulnerable to diseases, discouraging the persons' participation in the educational process, limiting employability and, ultimately, economic efficiency.

Table 6. *Human Development Index as dependent variable, 2001-2021*

| | OLS | GLS | GLS | PPML |
|---|---|---|---|---|
| Variable | | RE | FE | |
| $malaria_{it}$ | -0.012*** (2.65) | -0.022*** (5.58) | -0.024*** (5.76) | -0.023*** (2.90) |
| $land_{it}$ | -0.121*** (6.86) | -0.231*** (8.59) | -0.253*** (8.49) | -0.344*** (9.29) |
| $food_{it}$ | 0.223*** (6.91) | 0.301*** (11.44) | 0.297*** (11.08) | 0.518*** (8.30) |
| $pop_{it}$ | -0.008 (0.97) | 0.001 (0.01) | -0.002 (0.28) | -0.022 (1.04) |
| $unemp_{it}$ | 0.003** (2.07) | 0.002** (2.39) | 0.003*** (2.64) | 0.005** (1.99) |
| $inet_{it}$ | 0.002*** (8.67) | 0.001*** (7.86) | 0.001*** (7.26) | 0.004*** (7.45) |
| N | 208 | 208 | 208 | 208 |
| R-squared | 0.741 | 0.831 | 0.832 | 0.726 |
| VIF | 1.91 | 1.91 | 1.91 | 1.91 |

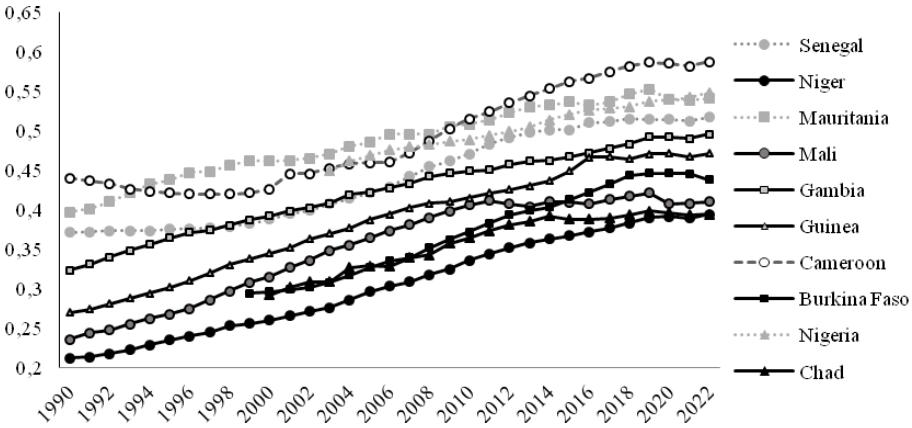
**Note:** *, **, *** denote significant levels at 1%, 5% and 10%, respectively. Standard errors in parentheses.

The sample admittedly includes a relatively limited number of observations, and for this reason it was deemed necessary to extend the time period at least for over twenty years. In all regressions no collinearity issues were detected, as VIF mean values are systematically lower than two. This also justifies that in both regressions the explanatory variables are not identical.

The above findings indicate several expected but also unexpected linkages between potential crisis-related factors and the quality of human capital. To begin with, the devastating impact of sanitary crises on human development is further confirmed, while on the contrary, the enhancing effect of providing Internet access acts once more as a factor in improving economic efficiency was systematically demonstrated. It is also expected that countries with higher human capital levels will gradually reduce their external financial dependency from international organizations and developed countries, something which fully fits into the idea of freeing the poorer countries from external economic and often political pressures. This certainly does not negate the need of external aid for Southern countries in order to upgrade their production structure, to improve social infrastructure such as health and education, to cope with any economic or socio-political upheavals, or even weather extremes that affect the limited agricultural production.

Summing up the quite unexpected findings, countries associated with lower arable land availability and higher unemployment rates, combined with more severe demographic pressures, seem to be more resilient, at least so far, recording the highest performance in terms of human development. It was also documented that these limited shares of arable land are strongly related to higher shares of desert land, which is also reflected in lower per capita water availability levels. These countries, however, systematically demonstrate higher performance in skills development (Chart 8), the same countries are associated with higher literacy rates both overall and at younger ages (Charts 4 & 5). It is precisely the higher quality of human resources that seems to help offset the negative impact of several crises that often take place in the Sahel region.

**Chart 9.** *Human Development Index (HDI): Sahel countries, 1990-2022*




**Source:** United Nations Development Programme (UNDP)

Countries such as Cameroon, Mauritania, Nigeria or Senegal consistently record the highest human development scores (Chart 9). The human development index takes values from 0 to 1, with lower scores corresponding to worse human development performance. The lowest scores are systematically observed in four of the G5 Sahel countries, namely Mali and Niger, Chad and Burkina Faso, the HDI values ranging between 0.4 and 0.45, excluding Mauritania. It is not a coincidence that many of the empirical studies and many of the development assistance programs focus on this specific country group, highlighting the difficulties faced and promoting targeted interventions to alleviate poverty and improve social infrastructure. Based on the

World Bank data, countries performing the higher HDI scores demonstrate higher GDP per capita levels, even though that the populous Nigeria is also included (about 220 million inhabitants in 2022).

Nevertheless, it should be noted that the above analysis cannot reflect a timeless, static picture of the interplay between the factors affecting human capital improvements, on the contrary. The results reflect the past evolution of the last two or three decades in Sahel. The higher GDP per capita levels observed in Sahel countries outside the G5 Sahel group (Nigeria, Senegal, Cameroon) describe the maintenance of higher availability of capital per worker, which implies that according to the Solow model of economic growth, population growth does not yet act as a barrier to economic growth of these countries, or at least so far. It therefore remains to be seen whether these countries will maintain their economic resilience in the years to come, compared to the G5 Sahel group.

To this end, the United Nations initiative to expand arable land in the Sahel region, along the southern part of the Sahara Desert, is also part of this resilience-building framework in the region, so as to enhance food security and increase employment opportunities for the region's young populations. The Great Green Wall initiative, as it is called, has been supported by the United Nations Convention to Combat Desertification (UNCCD) since 2007, extending over an area of 8,000 km, including the aforementioned Sahel countries. Some of the objectives of the initiative focus on investment in small and medium enterprises (SMEs), agricultural land restoration, expanding access to renewable energy, but also institutional development and effective governance promotion policies, among others. This strategy is clearly moving in the context of mitigating the vulnerability of the local populations, providing incentives to the young population to engage in productive activities. Investments in human capital are in line with this development strategy.

## Conclusions and Policy implications

The present analysis aimed to shed light on the underdevelopment issues in Sahel, mainly focusing on the role of improvements in human capital. Given the severity of the security crises in the region, providing incentives to young populations for being engaged in productive activities is the key to the local populations' welfare, thus discouraging any other choices, such as the en-

gagement in paramilitary or terrorist groups in the area. In this context, any interventions at the policy level should contribute to reducing the "opportunity cost" of participating in education, compared to engaging in armed action.

Developed countries clearly have a significant share of responsibility for any tensions taking place in Sahel, but at the same time the significant potential to pull local populations out of poverty. Recent developments regarding the withdrawal of French military forces and diplomatic services from Mali, Burkina Faso and Niger, during the years 2022 and 2023 (Lawal, 2023), demonstrate the domestic reactions related to economic and political interventionism from the countries of the North. These events highlight the need for consolidating a long-term cooperation strategy between developed countries and the Southern states, such as Sahel countries, through promoting synergies with mutual benefits for both parties. Developed economies could also help providing incentives in order for local populations to stay and live decent lives in their home places, which could additionally contribute to a nonviolent method of preventing intense population movements and refugee flows towards the European continent. Such a strategy could also help saving significant financial resources from the "management" of refugee crises and the confinement of refugee populations in camps, which could be allocated for the well-being of populations in their places of origin.

In the same direction, the transnational corporations' economic activities in sub-Saharan Africa, especially with regard to the extractive industries, the construction and infrastructure sectors, could be also develop in a sustainable and comprehensive way. To this end, a model of unitary taxation based on formulary apportionment is often proposed by experts and related organizations (Picciotto, 2017; ICRICT, 2018).This also implies the consolidation of a regulatory framework for shaping the transnational companies' productive activities in third countries, which ultimately affects the bilateral relations between the countries of the North and South. In any case, developed countries can act as partners towards building strong institutions in the Sahel region, promoting best practices for organizing production activities with respect for the environment and the imperatives of climate change. The present study exactly highlighted that any investments should have a positive effect on local creativity and productivity, upgrading the quality of human capital, in response to the multiple crises commonly faced by the populations in Sahel.

## Notes

1. The years of recording literacy rates are partly indicative, as data are not always available for the whole country sample during the specific years. Especially for 2004, the rates for Guinea, Mali, and Nigeria refer to 2003, for Burkina Faso and Niger refer to 2005, for Cameroon and Mauritania to 2007, for Senegal and Gambia to 2000. As for 2013, the literacy data for Burkina Faso and Guinea refer to 2014, for Mali and Chad in 2015, for Nigeria in 2008, for Niger in 2012, and for Cameroon in 2010. Finally, for the year 2022, the estimated rates for Guinea and Mauritania refer to 2021, for Cameroon and Mali to 2020, and for Nigeria to 2018. Similar limitations related to data availability are also existent in the case of younger adults (15-24 years old).
2. Further information about the HCI concept at: www.rug.nl/ggdc/docs/human_capital_in_pwt_90.pdf.
3. For more detailed information about the Human Development Index: https://hdr.undp.org/.
4. Fixed effects can additionally be taken into account in order to test for the effect of variables or factors remaining constant across observations. Fixed-effects estimations help by default to capture effects for variables that change across the observations (Farkas, 2005).

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**Theoretical Debate**

# The politics of Social Policy: a critical look beyond positivism

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**C. Skamnakis:** Social policy as a distinct research field is subjected to multiple research approaches and consists part of the interest of several academic disciplines. What we initiate here is a series of dialogue and reflection with the ambition that the contributions of the participants will enrich our understanding of the phenomenon, will enrich in-depth analysis so as, ultimately, an open space of theoretical debate for the study of the mechanisms and processes that result in the organization of social protection in contemporary social formations will thrive.

This virtual discussion begins from the perspective of Political Science. However as it turns out, there are no barriers to positioning and analysis. The topic

calls for a multifaceted approach, the aim being initially to refute the pervasive positivism that overwhelms the debate on social protection, its mechanisms and the interventions themselves. These elements are often cut off from the context in which they are developed, resulting in undermining the importance of the subjects themselves, of individuals or groups and of society as a whole is undermined. The aim of this endeavour is to highlight the numerous parameters that shape the form, type and, of course, content of social policy as an expression of social solidarity, the ways in which social welfare is collectively pursued and, ultimately, the processes of social reproduction.

For the purposes of organising the dialogue, we invited two researchers in the field to position themselves with regard to their own perspective on the analysis of social policy; in their responses they both shared a limitation of using literature references, in order to select those that they considered to have defined their own perspective in shaping the tool for the study of social policy. We thank them for responding to this challenge.

Both of them - as political scientists - approach social policy as an aspect of the state phenomenon and respond with regard to its importance in the development of the capitalist system, both in the process of accumulation and the consequent social organization and reproduction.

In these two responses, fruitful convergences and divergences emerge that feed critical analysis regarding the changing content of social welfare in the context of capitalist organisation. The -real- opposition between the objectives of state-organised social protection and the simultaneous obligation to serve the needs of the free economy coexist and shape the delicate balance of the welfare state. The state is called upon to ensure that mutual agreements are reached. The ways in which it succeeds or fails in this process is also discussed below.

In addition, the two articles provide an answer regarding the central mechanism for the development of social protection, which is thus the main field of study of social policy.

Enough, however, with the initial remarks.

## Shaping Perspectives on Social Policy

**L. Kotsonopoulos:** While social policy is typically approached through the lens of societal inequalities and injustices, my path into this field stemmed from a different angle: exploring how states evolve their organizational ca-

pacities. Traditionally, state development is attributed to factors like military organization and taxation. My research, however, investigates whether states also leverage social policy as a tool to reorganize and expand their capacities, thus opening avenues for various models of social reproduction. This inquiry centers on three critical relationships: that between states, citizens, and democracy, raising questions of social rights; between state policy and capitalism, highlighting inherent contradictions; and between social policy and state formation, which emphasizes the role of institutional power dynamics. In this context, three key texts—Marshall's exploration of citizenship and social rights, Gough's analysis of welfare within capitalism, and Pierson's insights into institutional structures—have been instrumental in shaping my understanding of social policy's complex role.

T.H. Marshall's seminal work, *Citizenship and Social Class*, fundamentally redefined the role of social policy, shifting it from a crisis-driven response to a consistent, state-planned policy for societal well-being. Marshall's approach situates social policy within the framework of rights, positioning it as a vital element of citizenship available to all members of society. This reorientation has significant implications for understanding social policy: it reframes it as a public policy aimed at the community's collective prosperity rather than merely addressing urgent needs.

This conceptualization of social policy as a right establishes it as a long-term strategy integral to public policy, central to fostering societal stability and cohesion. In Marshall's view, social policy is instrumental in social reproduction; it ensures sustained community welfare and aligns with the state's overarching duty to promote equity. The implications of Marshall's theory are profound, as it suggests that social policy underpins social cohesion by embedding welfare mechanisms directly into the fabric of citizenship itself, creating a foundation that enables individuals to participate fully in social, economic, and civic life

While Marshall presents an optimistic view of social policy's potential, Ian Gough's *The Political Economy of the Welfare State* presents a critical examination of the limitations inherent in such policies. Gough argues that, within capitalist systems, social policy cannot function purely as a tool for social reproduction due to the contradictions embedded in the very structure of capitalism. This critical perspective reveals that social policy operates within economic constraints that limit its reach and impact.

Gough's analysis exposes the inherent tensions between welfare goals and capitalist imperatives, especially regarding the distribution of resources. Capitalist structures, he argues, prioritize profit and accumulation, which inherently restricts the state's ability to extend welfare comprehensively without encountering opposition from powerful economic interests. Gough's thesis underlines the limits of social policy as a stabilizing mechanism, as its efficacy is compromised by economic forces that prioritize capital over collective well-being. His perspective forces a critical examination of the relationship between social policy and capitalism, reminding us that welfare systems must navigate structural limitations that inherently limit their scope and sustainability.

Pierson's *Politics in Time: History, Institutions, and Social Analysis* introduces an institutional lens to the study of social policy, emphasizing that power dynamics within institutions significantly shape welfare outcomes. The new institutionalism, as Pierson argues, shifts focus from the broader system-level analysis of social policy's role in society (as seen with Marshall and Gough) to the specific power relations embedded within institutions.

Pierson's approach highlights how institutional structures, shaped by historical and political contingencies, create inertia and entropic forces that influence the development and implementation of social policies. Unlike Marshall's assumption of harmony between social policy and social structures or Gough's critique of capitalist limitations, Pierson's analysis emphasizes the nuanced, often ambivalent, effects of institutional arrangements. Institutions can both enable and hinder social policy, depending on the power dynamics they encode and perpetuate. This institutional perspective brings a new level of complexity to social policy analysis, recognizing that power relations within institutions condition social reproduction processes, often creating tensions and asymmetries that redefine the welfare state's role in society.

The insights from Marshall, Gough, and Pierson contribute to a more nuanced understanding of social policy's role in shaping and sustaining social structures. Social policy touches at the heart of bourgeois societies, especially as it mediates the relationship between capital and labor. Through mechanisms of resource distribution and welfare, social policy becomes a tool that reinforces social stratification, embedding economic and social hierarchies within institutional frameworks.

Marshall's optimistic view portrays social policy as fostering inclusivity and stability, aiming at creating a cohesive society where welfare is accessible to all as

a citizenship right. However, Gough and Pierson's perspectives caution against viewing social policy as a panacea; instead, they underscore the intricate, often contradictory role of welfare in capitalist societies. In these systems, social policy functions as both a stabilizing force and a means of social stratification. It inadvertently reinforces economic divisions by distributing resources through stratified systems that prioritize certain groups over others. Moreover, Pierson's institutional perspective adds that these policies are mediated by the power relations entrenched in institutions, which can create a variety of outcomes, from equitable distributions to entropic, inertia-laden structures that resist change.

Today's social policy priorities reflect a deepening awareness of welfare as a product of institutional dynamics rather than merely an abstract social ideal. Recognizing welfare states as systems of power, contemporary analysis should focus on how institutional structures and embedded power relations influence policy development and social reproduction. Social policy now encompasses issues such as economic inequality, demographic shifts, and labor market changes, each demanding nuanced approaches that acknowledge the interplay of institutional power, historical legacies, and social goals.

Contemporary social policy must prioritize flexibility within institutional frameworks to address these shifting demands. The institutional perspective advanced by Pierson becomes crucial here: to ensure social policy effectiveness, it is essential to consider how institutions can be reformed to balance power disparities and foster adaptable policy frameworks. Addressing social policy as an institutionally grounded power system requires ongoing assessment of how welfare policies align with or challenge capitalist imperatives and respond to demographic and economic transformations.

While institutionalism offers valuable middle-range insights into the outcomes of policy processes, it alone cannot fully address the broader crises that contemporary social policy must now navigate. Today, social policy faces unprecedented challenges rooted in fundamental contradictions within social production itself. Among these are the climate crisis, the health crisis, and the shifting relationship between capitalism and democracy. These crises introduce complex tensions that institutional frameworks must confront, often without established solutions.

The climate crisis redefines interactions between capitalism, society, and the state. This environmental emergency challenges the conventional limits of social policy by reframing inequality and power asymmetries on a global scale.

A critical question emerges: can states develop resilient institutions capable of mitigating climate change's impacts, and, if so, should these efforts rely on market mechanisms or centralized state planning? Here, Marshall's vision of social policy as a universal right meets Gough's analysis of capitalism's structural limitations. Gough's skepticism regarding welfare's capacity to transcend capitalist contradictions is highly relevant, as the climate crisis reveals that market-driven solutions may not align with the collective good. This raises urgent questions about the state's role in directing social policy toward sustainability and equity, requiring a recalibration of both welfare goals and institutional capacities.

The health crisis presents another test for social policy, especially as it exposes vulnerabilities in the capitalist model of healthcare provision. The COVID-19 pandemic, for instance, highlighted the precarious balance between private healthcare markets and public health needs, underscoring the importance of robust, state-supported health systems as essential social rights. Similar to the climate crisis, the health crisis necessitates an assessment of whether market mechanisms can provide equitable and resilient solutions or if state intervention is necessary to protect public welfare. Marshall's concept of social rights suggests that health should be a guaranteed right within welfare states, yet Gough's critique reveals the limits of achieving this within a capitalist framework that prioritizes profit. These tensions demonstrate the need for social policy models that prioritize public health as a cornerstone of social welfare, reinforcing the necessity of state planning in this domain.

Finally, there is a growing awareness that capitalism can flourish without democracy, a shift that fundamentally challenges the foundations of welfare states. Welfare systems historically developed alongside democratic governance, with the assumption that capitalist prosperity and democratic rights were mutually reinforcing. However, the rise of authoritarian capitalist regimes reveals that economic growth and stability can be maintained without democratic accountability, which raises critical questions for the future of welfare states. If democracy is no longer a requisite for capitalist success, then what's next for welfare policies rooted in democratic principles and social rights?

The evolution of social policy perspectives, from Marshall's citizenship-based approach to Gough's critique of capitalist limitations and Pierson's institutional analysis, illustrates the complexities of welfare as both a right and a system of power. Contemporary social policy must navigate these foundational insights while addressing emerging challenges in economic inequality, labor relations,

and social stratification. Ultimately, the welfare state remains a reflection of institutional power dynamics, and the ongoing challenge is to leverage these structures to promote both equity and resilience in the face of societal change.

## The contribution of party theory to social policy theory

**C. Eleftheriou:** To a significant extent, social policy analysis is concerned with discerning the specific tenets of social justice and social welfare within a given society. In the field of political sociology, the fundamental relationship between the state and society also determines the parameters within which political contests occur. These contests are characterised by the confrontation of disparate conceptions of social welfare and justice. Consequently, social policy represents a pivotal element within the political agendas of the parties, both due to the prominence of this issue within public opinion and due to the fact that the issue of social reproduction serves as the foundation for the public policies that the parties seek to advance. Thus, there is an ideological aspect to consider, namely how different party ideologies define social policy and incorporate it into their programmatic focus. There is also a strategic aspect to consider, namely how particular approaches to the social agenda allow parties to electorally reach out to certain coalitions of social interests. Political parties, as organised expressions of political ideologies, are influenced by social dynamics and the prevailing discourse on social policy. However, as voluntaristic actors, they attempt to influence or manipulate the views of society on social issues. Given their intrinsic purpose of claiming and exercising power, political parties play a pivotal role in legitimising shifting perceptions of social welfare and justice within society, which subsequently inform the content of social policy.

This presentation employs the well-established typology for the evolution of political parties (cadre parties, mass parties, catch-all parties, cartel parties) (Duverger, 1964; Kirchheimer, 1966; Katz & Mair, 1995) to ascertain how each party type, shaped by particular socio-political circumstances, gives rise to a complex understanding of social policy that it seeks to legitimate within society. The influence of social dynamics on political parties is evident at the interface between state and society. However, the orientation of the state's strategy also plays a role in determining the behaviour of political parties, given their position within state institutions. It is important to note that the ideology of each

party is also an independent variable. The ideological effect of each party is shaped by the dynamics of party competition, which in turn are influenced by the dynamics of government and opposition.

The **cadre party** (Duverger, 1964) emerged at the end of the 18th century, a period characterised by limited electoral participation, the prevalence of the so-called 'night-watchman state', and the initial phase of the emergence of the social question. The party is characterised by limited participation, with recruitment based on wealth or status to support electoral activities. Its primary focus is on parliamentary activities. The party views ascent to government as a means of distributing state resources to its cadres and supporters. At the very least, the liberal version of the party functions as a factor in consolidating the centralised power of the nation state. This implies that during the initial stages of capitalist development, the state's primary function is to facilitate the process of commodification and to establish the fundamental structures for the reproduction of society. For cadre parties, given the limited scope of political participation to a select few, the objective is to represent the elites. Consequently, at the level of social legislation, any initiative that emerges is the result of external pressures. In light of the fact that the labour movement is still in its infancy, it is evident that social welfare is linked to philanthropy and private initiative. Consequently, the cadre parties can be considered the guarantors of minimal state intervention. In a context of limited electoral participation, extra-parliamentary action serves to bring the social question to the centre of public debate. However, this does not necessarily guarantee that the social question is perceived as a public issue to be solved. By the mid-19th century, the cadre parties were compelled to consider the demands of the emerging labour movement and to form alliances with sections of it, primarily to forestall social changes that the political elites of the time deemed detrimental and unmanageable. The cadre parties, which are typically adaptable to social evolution, assumed the responsibility of gradually adapting the elites to the significant social transformation of industrial society. This process was ultimately superseded by the emergence of mass parties.

The **mass party** (1880s-1950s) (Duverger, 1964; Heyer, 2022) can be seen as a product of two key developments: firstly, the extension of suffrage to the working class in the late 19th century; and secondly, the expansion of the functions of the state, particularly in relation to its social role. The contemporary era is characterised by the continued expansion of capitalism, alongside the imperialist expansion of the most powerful capitalist countries. Furthermore,

this is a period of significant growth for the labour movement. The mass parties, as parties of social integration, are characterised by the presence of centralised and hierarchical organisations with strong bureaucracies. These are designed with the objective of integrating the working masses into the electoral process. For this reason, we consider the mass party to be the principal channel for the expression of the labour movement, although the mass organisational type has also become dominant within the parties of the right, a process that Duverger has termed 'contagion from the left'. The mass labour (an socialist) parties bear resemblance to anti-societies, forming in their organisational milieu ancillary organisations that function as alternative networks of solidarity that serve to substitute for the social deficits of state interventions. The mass labour party thus represents a model of an alternative state policy based on a project of social transformation. In essence, the broadening of the basis of representation signifies, above all, the influx of the masses into the political sphere and the reorientation of the social question as a central concern within the domains of public discourse and state policy. Inclusion in the political sphere implies an understanding of citizenship in its social dimension. Consequently, parties that espouse egalitarian solutions and inclusive conceptions of social welfare and justice are now able to either claim participation in government coalitions or function as a robust and stable opposition. The mass party becomes the agent of democratisation, or rather the most authentic representative of society vis-à-vis the state, with the explicit aim of transforming the latter into a proponent of a more just society. To a certain extent, this also obliges the regime forces to act proactively in order to avoid political and social changes that would be disadvantageous for the preservation of their dominance. Furthermore, this dual pursuit from both pro-system and anti-system forces gives rise to the necessity for the legitimation of the welfare state.

The **catch-all party** (Kirccheimer, 1966), in contrast, represents a further development of the mass party. It emerged in the post-war period and can be seen as a political consequence of the post-war consensus regarding the primacy of the welfare state in regulating society-economy-state relations. Social citizenship is accepted, and social policy is understood in principle on the basis of social rights. This is legitimated by a social contract between capital and labour that, to a greater or lesser extent, makes the effects of political competition more managerial and less ideological. Indeed, the welfare state as a principle for achieving and sustaining collective welfare through universal social protec-

tion of citizens narrows the scope of political competition by forcing political forces to programmatic convergence. The emergence of the middle class as a new social reality, to some extent determining the outcome of elections, has led to the formation of political parties that rely on the support of voters by appealing to professionals of politics and expert technocrats of the welfare state. Party leaders may be seen as personalised versions of party competition, which gradually hollow intra-party democracy out. However, concurrently, the corporatist arrangements at the foundation of the post-war social contract that undermine parliamentary politics and effectively nullify the function of the opposition, alongside the most expansive welfare state in modern history, have been established. The new state, however, of party politics explains why, after the 1970s, there are not those organised mainstream forces that will defend it from the neoliberal attack it will face.

In this context, the **cartel party** type (Katz & Mair, 1995) can be seen to fit into a context of neoliberal domination and authoritarian statism, where the re-commodification of social policy and the prevalence of the safety net logic lead to a generalised deregulation of social protection and social inclusion systems. Those parties that are gradually losing their social influence, particularly social democratic parties, are seeking to ensure their political survival by turning to the state and its resources. The interpenetration of state and parties renders the latter fully dependent on state funding, entrenched by the social dynamics and turmoil caused by neoliberal policy shifts and embedded in a framework of party competition that simply reproduces the existing balance of power with mere alternations of the institutional positions of the government and the opposition. The party cartel constitutes a closed club of political forces that perpetuate themselves through the state apparatus and seek to impede the entry of new contenders into the party system. The legitimacy of political parties is largely contingent on their ability to win elections. In essence, they serve to legitimise the strategy of the neoliberal regulatory state. This strategy is based on the expropriation of social rights and the reduction of the scope of the welfare state. In the context of globalisation, it is evident that political parties that have developed as national political actors find it challenging to respond to new conditions that challenge the primacy of national politics. Consequently, they are progressively reframing their understanding of social policy, endorsing competing manifestations of re-commodification and largely conceding the primacy of individual needs and requirements over the collective ones. This

mutation is most evident of course in the left-wing parties. However, without the intervention of the cartel parties, it would not have been possible to obtain societal consent for these changes. This intervention has the effect of alienating the parties from society, leading to the emergence of political disengagement and low political trust in the citizenry.

In conclusion, this short discussion on the relationship between party development and the evolution of social policy has yielded three initial findings. Firstly, parties can act as potential managers of power and as channels for the expression of social interests, thereby serving as a basis for the legitimation of either the expansion of the welfare state or the reduction of its functions. This does not necessarily imply a contingency of political and social action, but also a dynamic of political competition and political correlations that affect social policy choices and state strategies. Beyond the 'iron laws' of social evolution, political competition also exerts influence over the formation of political outcomes, either facilitating or blocking their emergence. Secondly, the relationship between the party and the state is of great importance, as the state requires the party to legitimise its political structure; however, the party is dependent on the state apparatus to implement any programme. With the exception of the initial period of mass parties, this relationship tends to moderate the transformative tendencies especially of left-wing parties, which have an inclination to accept a logic of political moderation or realism. Thirdly, society, as a recipient of social policies, interacts with the parties in two distinct ways. On the one hand, it may use them as vehicles of protest or even political transformation. On the other hand, it may provide its consent to state choices through party or electoral participation.

In any case, as demonstrated by the above typology of the party phenomenon, it remains unclear what the trajectory of social policy will be in the future and what form the political actors who will seek to legitimise this trajectory will take. The unprecedented social rejection of the parties raises the question of which forces will support any new conception of social policy. Will it be the market forces that have been the dominant force for many decades, or will parties that draw a new support from new, dynamic but short-lived social movements gain ground?

**C. Skamnakis:** If one were to draw a general conclusion from the responses outlined in the above two texts, one could safely note the commitment to

the analysis of institutions and their transformation processes as a central field for the study of social policy. Following different paths, Kotsonopoulos and Eleftheriou propose the analysis of the institutional elements that constitute the contemporary formal social protection structure. Consequently, the issue of power distribution in contemporary social formations reaches the institutional framework, mainly through the political process and it is confirmed through the various processes of legitimation, thus shaping the final expression of social policy and ending up determining the content of collective well-being today. This discussion does not end here. New contributions will be added, enriching the reflection on the issue of the formation and transformation of social protection mechanisms in the contemporary world.

Thank you very much.

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# Book Reviews

## Pothiti Hantzaroula, *Children Survivors of the Holocaust in Greece. Memory, Testimony and Subjectivity*, London: Routledge 2020, 278 pp.

Pothiti Hantzaroula is an experienced Oral Historian and Anthropologist, who has offered us groundbreaking works on different areas of Greek History, such as domestic female work and the Holocaust. Hantzaroula's last book – which was initially published in English and has been recently published also in Greek [Ta paidia thimoudai to Olokaftoma. Martyria, istoriographia, mnimi, Athina: Plethron 2023] – is the result of her long-lasting research in the field of Holocaust studies. Her research, which is based on numerous interviews – part of which she has conducted herself – with Greek-Jewish survivors, constitutes an original work on the formation of memory of children survivors of the Shoah in Greece. It also constitutes a work of reflection on the historical circumstances in which Oral History archives – and specifically those regarding the Shoah – were formed.

In chapter 1 ("Meaning, Memory and Archive"), the author proposes a *genealogy* of the testimonial genre in Greece after WWII, which sheds light on the relationship between family and public memory, commemoration, and the shaping of testimony. It is noteworthy that such an approach of oral *and* written testimonies, which stresses the age-specific construction of the memory of genocide, has no precedent in Greek historiography; it therefore fills a relative gap in research and initiates further dialogue on Greek narratives on the Shoah in general, as well as on the nature of children survivors' narratives in particular.

The author proceeds in chapter 2 ("The war became real") with the analysis of children's memory of the events of war and occupation. She argues

that a certain mode of experiencing the traumatic events and understanding these experiences exists for children. Hantzaroula shows how the tools of psychoanalysis, which – as she reminds us – is essentially a historical method, can assist the historian's effort to approach children's subjectivity. But before situating in their context children survivors' narratives, the author offers a well-documented overview of the Holocaust in Salonica. She then relates children's traumatic experiences to the events of the war through a subtle analysis of their discourse. What gives her analysis its particular value is her comparative perspective. Hantzaroula compares different oral testimonies of the same person at different times and to different interviewers, allowing for an understanding of the particularities of the construction of children's memories in post-war world.

The following chapters 3-5 ("Trajectories of escape from the German persecution of the population of Salonika and Athens", "Hidden children in Volos" and "Life and memory of concentration camps") focus on children's lives during the Shoah. Through their testimonies, the events related to persecution, hiding in cities and escape to the Greek countryside or Palestine unfold. As Hantzaroula interestingly points out, children's accounts not only document fear, anguish, pain. They also reveal that children, while in hiding or in Palestine, discovered new meanings in their lives. As for girls in particular, the author shows that a dynamic and self-assured subjectivity, which distinguished them from their mothers' generation, emerged. Additionally, the author focuses on children from the city of Volos, the Jewish community of which survived in great numbers, thanks to the efforts of the Resistance movement. Hantzaroula shows that these children's post-war identities differed significantly from those of their coreligionists from Salonica – an almost completely destroyed community. In the case of children from Volos, a perception of the self, grounded on feelings such as self-confidence and recognition, developed.

Hantzaroula's study contributes to research on the Holocaust in Greece in one more significant way. The author explores the formation of memory of a category of survivors who had been largely neglected by researchers, namely children who had been deported to Bergen Belsen, a concentration and not an extermination camp. Through a delicate analysis of their emotional vocabulary, Hantzaroula shows that, contrary to what is widely believed, children who survived Bergen Belsen suffered equally and should therefore

not be considered as "privileged" survivors. She also reminds us that, in many cases, their suffering continued after the end of the war. Besides, as it is shown in the book, antisemitism did not cease to manifest itself in the aftermath of the war.

It is precisely antisemitism after the war that is explored in chapter 6 ("The beginning of an unknown era"). Hantzaroula's analysis of the continuities between pre-war and post-war Greek antisemitism is remarkable. Not only she documents the resilience of antisemitism in Greek society; she also shows that antisemitism was an organizing principle of post-war Jewish identity, and therefore of the survivors' testimonies as well. In chapter 7 ("Remaking the meaning of living *entre mozotros*"), the author examines furthermore the making of post-war Jewish identity. The contribution of social Jewish institutions in the formation of a positive self-perception is explored in depth. In the book's final chapter ("Family legacies"), Hantzaroula presents an equally fine analysis of intergenerational transmission of memory. As she studies specifically cases of children born *during* the war, filling thus a gap in relevant historiography, she shows that memory of these children is mediated by imaginative investment and is shaped by events that were not understood.

As the author states in her epilogue, Greek Jews were forced to bury their memories after the war when they encountered open antisemitism. Hantzaroula's original work not only contributes to the study of the Shoah and its memory in Greece; it also contributes to the study of the surrounding, not always welcoming, Greek post-war society.

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**David Graeber and David Wengrow,** *The dawn of everything: A new history of humanity* [H avgi ton panton. Mia kainourgia istoria tis anthropotitas], Chistodoulos Litharis (Trans.). Athens: Dioptra, 2023, 784 pp.

Anthropologist David Graeber and archaeologist David Wengrow, in a 10-year long project, seek to present a new history of humanity. The most

prevalent view, to this day, is that traditional societies were great once upon a time, just like Rousseau's arguments, but to organise large and complex societies, state government and hierarchy are inevitable, just like Hobbs' arguments. According to Rousseau, the Agricultural Revolution paved the way for economic exploitation, allowing some to disproportionately benefit from the labor of others. Consequently, contemporary discussions on inequality emphasize economic shifts, suggesting that achieving true egalitarianism necessitates the elimination of surplus accumulation, which appears daunting given the apparent unattainability of equality beyond the most basic food-gathering societies.

From the opening chapter, the authors clarify that their book diverges from inquiries into the origins of inequality and confront traditional Hobbesian and Rousseauian interpretations of human history. They challenge persistent misconceptions regarding scale and agriculture, opting instead to craft a distinct world history rooted in indigenous critiques, i.e., the inclusion of contributions to sociological thought from peoples outside the European canon, while also contesting mainstream claims by anthropologists regarding the implications of agriculture on population density, hierarchy, and monumental architecture.

In chapter two the authors pose the question how Rousseau came to believe there was pre-existing equity before inequality. It seems that the ideas of individual liberty and political equality were inspired by the native Americans. In the 17$^{th}$ century, Europeans harboured apprehensions towards concepts of freedom and liberty, perceiving them as potentially destabilizing forces. Conversely, Indigenous thinkers embraced and revered these ideals. The ideas of freedom started to coincide with that of equity. Their evidence comes to refute Rousseau's myth of "stupid savage" as indigenous people were thinking about their social and political possibilities.

In chapter three, the authors reveal the dynamic nature of human politics through an exploration of the Stonehenge builders. Positioned between foragers and herders, these individuals, despite prior engagement in farming, consciously reverted to hazelnut gathering around 3300 BC. This deliberate shift suggests a conscious decision-making process. Chapter four delves into the concept of property, positing its roots as ancient as the sacred itself, and perhaps as old as humanity. Rather than merely probing the origins of private property, the authors analyse its pervasive influence across various

spheres of life. Challenging the conventional portrayal of pre-agricultural societies as solely composed of roaming hunter-gatherer bands, chapter five presents mounting evidence suggesting a more perplexed social structure. The authors highlight the political awareness of ancient peoples, emphasizing their nuanced choices in interactions with others and advocating for the concept of *schismogenesis* (p. 235).

In Chapter 6, the question of agriculture is examined, alongside findings from the earliest archaeological settlements of farming. It seems that farming did not once and for all replace other activities, so it was a specialized activity among many others. There was a strong seasonal rotation of activities, with hunting in winter and cultivation in spring with the help of overflowing rivers. The importance of women is also highlighted as harvesting plants, turning them into food, medicine, and construction are almost everywhere female activities.

In Chapter 7, the authors challenge the idea that the rapid spread of agriculture is based on the European ecological imperialism of the 1500s. Modern findings do not reveal any dramatic transition to farming, nor do they show that the adoption of agriculture meant the invention of private property. In fact, agriculture began as a deprivation economy where people invented it when there was nothing else to do, so it occurred in areas where natural resources were scarce.

Moreover, things that are thought as necessary for/in cities, according to the academic literature as necessary like agriculture and wheel, are nowhere to be found in earliest cities. In chapter 8 the authors present cities without temples, in other words there was urban life without administration. Most of these mega-sites are not known due to the fact that their discovery stems from non-Western scholarship during the Cold War era. Their existence challenges traditional notions of what constitutes a city, hence they do not neatly fit into prevailing Western paradigms. In Chapter 9, scale and complexity is presented without hierarchy, contrary to the misconception of it being likened to kingship. Instead, it reflects urban democracy.

In chapter 10 Graeber and Wengrow sum up the three characteristics that a state should combine i.e., violence, knowledge, and charisma/heroic politics. They argue that only modern states integrate all three traits combined, whereas five centuries ago, there were regimes categorized as first or second order, prioritizing one or two of these attributes. The reader is invited to a

new science of history where issues concerning the origins of farming, property, cities, democracy, and civilization are put under a different explanatory framework. As they recall in chapter 11, throughout the book the authors challenge conventional understandings about hunter-gatherer societies, the consequences of agriculture, the emergence of cities and states. They argue persuasively that much of this conventional wisdom emerged as a response to Indigenous critiques by Europeans.

In the concluding chapter 12, the authors propose that we could be living with completely different conceptions of what human society really is. They advocate for a shift away from the simplistic query of inequality's origins towards a deeper interrogation of how we became stuck. This reframing prompts contemplation on the erosion of basic freedoms intrinsic to Indigenous cultures – freedoms such as mobility, resistance against elite dictates, and the capacity to shape entirely new social realities. This radical shift in perspective holds the key to envisioning unprecedented forms of liberty and societal organization. As Graeber and Wengrow point out in the back cover of *The Dawn of Everything*, such a change in our perception offers a way of imagining new forms of freedom and new ways of organising society.

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**Görkem Akgöz,** *In the Shadow of War and Empire: Industrialisation, Nation-Building and Working-Class Politics in Turkey.* Leiden: Brill, 2024, 374 pp.

The book *In the Shadow of War and Empire* has a strong interdisciplinary character offering valuable information on labour and gender and their spatial dimensions from a historical perspective. It begins in the 1840s and ends in the 1950s. Akgöz makes a major contribution to the study of factories, challenging their standard description in the bibliography as spaces of efficiency and progress.

The author attempts to deconstruct this ideal description of the Turkish state's strategy towards industrial relations. More specifically, the author focuses on the operation of state-owned factories in the textile industry which

became vehicles for the Atatürk government's efforts to present itself as a regime beyond class conflict, which treated industrialists and workers as equals. Nonetheless, this strategy towards labour imposed the repression of workers' rights in the name of protecting the country's national unity. At the same time, however, the strategy led to the construction of an extended railway network all over the country and the establishment of state-owned industrial units in remote and previously deserted areas in the Turkish hinterland. In the 1930s, the Turkish government approached German experts who were in exile due to political circumstances and invited them to contribute their expertise for the sake of Turkey's industrial development. The experts tried to apply German scientific management methods, transferring them from contexts where a strong labour movement prevailed to the Turkish context of cheap, unskilled and unorganised labour where industrial development was in its infancy.

The factories owned by the Turkish state offered a picture of order and efficiency in the region of Anatolia, challenging the underdevelopment and economic backwardness which prevailed in the past. The factory sites provided workers' dormitories and even nursery facilities for female workers. "Atatürk's minarets", as American experts would call the chimneys of state factories, became the symbol of Turkey's progress and emancipation from its bleak Ottoman past. Akgöz describes quite eloquently life in the factories based on interviews and biographical notes, taken from unit managers and foremen but also from workers. She has studied archival records but also, quite inventively, obituary notes published in local newspapers. By doing so, she succeeded in presenting Turkey's industrial past quite vividly to the reader. The author puts emphasis on the bleak working conditions in the state factories marked by low wages and high labour turnover. She suggests that the main reason behind the high levels of worker absenteeism was the intensification of work. Workers were prone to leaving the factories claiming to have pressing duties in their home villages. According to Akgöz, however, the real reason for their departure was the harshness of working conditions in state factories.

The author also puts emphasis on the interplay between nationalism and anti-communism in industrial relations in Turkey. Akgöz argues that the primary goal of Atatürk's regime was to pretend that the government protected equally workers' and employers' interests. Nevertheless, the nationalist

discourse presupposed workers' obedience at the shop floor. In an attempt to reinforce Turkey's particularity vis-à-vis developed European societies and the ex-colonies in the Far East, the Turkish government adopted a strategy towards labour based on the systematic repression of labour organisations. Workers could only express their reaction to their employers' authority through individual petitions and absenteeism. When trade unions emerged in the mid-1940s, the government tried and eventually succeeded in eliminating Communist influence by persecuting communist cadres. Akgöz is eloquent in describing the tragic the fate of Mustafa Subhi who had founded the first Communist Party of Turkey. Subhi "was cast into the Black Sea off Trabzon" along with a group of his comrades in January 1922. Nevertheless, despite all that repression the labour movement resisted and its subterranean struggle culminated in overt resistance in later decades.

In the introduction, the author presents the goal of the book which is to describe the path of industrialisation in Turkey focusing on class relations in the workplace and offering an account of workers' experiences at the shop floor. In other words, Akgöz offers an account of class conflict in her country "from the bottom up all the way to the top". The first chapter is about industrialisation during the Ottoman era, focusing particularly on state factories sited close to the coast of the Sea of Marmara, back then called the "Turkish Manchester." The second chapter focuses on state factories during the first years of Ataturk's government which imposed the strategy of etatism in industry. The author explains that the leitmotifs of the Turkish independence struggle were extended to industrial relations resulting in the enactment of a labour code that tried to "act as a thick wall against the division of labour into classes". The third chapter describes factories as spaces where the ideals of modernity and progress were encapsulated. The author devotes special attention to the participation of women in the industry and offers an explanation for the employers' preferring women over men as textile workers. It was the dexterity of female hands and the cheaper female wages. The fourth chapter offers a view from the factory where Akgöz deconstructs well-established arguments about the efficiency of the Turkish industrialisation project and the docility of the labour force. As the author proves, there had been upheavals in the factories' operations and worker resistance on an individual or collective basis. In the fifth chapter, the author analyses particular patterns of worker resistance trying on the one hand to push the bosses to concede

to their demands and on the other hand to show their compliance with the patriarchal idea of the state as a "benevolent father" (devlet baba). The sixth and final chapter provides a brief but detailed reference to Turkish trade union politics focusing on worker politicisation from the shop floor to the trade union. The book's conclusion defends the nostalgic feelings deriving from the privatisation of state factories in Turkey by paying tribute to the legacy of state-led industrialisation. The final chapter depicts the oxymoron between the harsh conditions of work the author described in the previous chapters and the nostalgia modern Turks seem to feel about the legacy of their state factories. Here the question that should be asked refers to that antithesis. For Greek readers I think the main contribution of this book is the reference on selective recruitment of workers employed in the state factories along ethnic lines, a fact that puts industrialisation in Turkey within a particular international environment wherein class and nation were closely connected.

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**Nikos Petrochilos** (ed.), NOSTOS Periodical Publication, Volume 1. Athens: Association of Kytherian Academics, 2002, 359 pp.

**Koula Kassimati** (ed.), NOSTOS Periodical Publication, Proceedings of the International Symposium *Venice and Kythera*, Hellenic Institute of Byzantine and Post-Byzantine Studies in Venice, Association of Kytherian Academics, Venice 6-7 December 2002, Volume 2. Athens: Association of Cytherian Academics, 2003, 244 pp.

**Koula Kassimati** (ed.), NOSTOS Periodical Publication, Volume 3. Athens: Association of Kytherian Academics, 2005, 277 pp.

**Koula Kassimati** (ed.), NOSTOS Periodical Publication, Volume 4. Athens: Association of Kytherian Academics, 2007, 394 pp.

**Koula Kassimati** (ed.), NOSTOS Periodical Publication, Volume 5. Athens: Association of Kytherian Academics, 2008, 437 pp.

**Koula Kassimati** (ed.), NOSTOS Periodical Publication, Volume 6. Athens: Association of Kytherian Academics, 2010, 305 pp.

**Koula Kassimati** (ed.), NOSTOS Periodical Publication, Volume 7. Athens: Association of Kytherian Academics, 2012, 274 pp.

**Koula Kassimati** (ed.), NOSTOS Periodical Publication, Volume 8. Athens: Association of Kytherian Academics, 2013, 315 pp.

**Koula Kassimati** (ed.), NOSTOS Periodical Publication, Volume 9. Athens: Association of Kytherian Academics, 2018, 334 pp.

**Koula Kassimati** (ed.), NOSTOS Periodical Publication, Volume 10. Athens: Association of Kytherian Academics, 2023, 500 pp.

NOSTOS, the periodical publication of the Association of Kytherian Academics, which has recently completed 22 years with its 10th volume, ranks among the most characteristic scholarly journals in our country in the field of regional history. It maintains a high and truly enviable level in form, structure, and content. In its recently published 10th volume, this precious Kytherological encyclopedic library - invaluable not only to scholars of Kytherian studies but also to the general reading public - offers a treasure of detailed information.

In the preface of the latest volume, our dear colleague and friend, Koula Kassimati, the "soul" of this publication, provides in her capacity as editor a profound survey and evaluation of this long-term editorial effort of 10 "fascicles" - as she humbly calls the volumes (Volume 10: 19-33). We all know, however, that each of these "fascicles" is actually a veritable volume of encyclopedic knowledge. What we have in fact is a 10-volume corpus of multidimensional character and importance, consisting of critical contributions from Kytherian academics, researchers and other scholars, as well as non-Kytherian scholars who have established themselves as "philo-Kytherians" with relevant published works.

Indeed, the term Kytherology can now be used well because of the seminal contributions of many Greek and non-Greek scholars, especially from the 1970s onwards, but also because of this unique scientific body. This effort duly honours the original editor of Volume 1, the Latinist Nicholas Petrohilos, emeritus professor of the University of Thessaloniki, and Koula Kassimati, emeritus professor of the Panteion University, who undertook with remarkable responsibility and enthusiasm the editing of the next nine volumes.

One does not often come across a journal in Greece that carries the academic quality and excellence that *Nostos* has. This brings to mind the words of a medieval colleague of mine, who is sadly no longer with us. A specialist in fortification studies, combining the expertise of a historian with that of an archaeologist, he was impressed by the number of printed scientific publications in Greece in relation to its relatively small population. He followed with admiration the course and development of magazines such as *Nostos*. I also remember him highlighting earlier journals of Greek regional history and culture such as *Peloponnesiaka* and *Laconian Studies* edited by the late Tasos Gritsopoulos (1911-2008) and Dikaios V. Vagiakakos (1917-2016), *Archeion Pontou* edited by the late Odysseus Lampsides (1917-2006), and others like Deltion Mikrasiatikon Spoudon, Epeirotika Chronika, and Makedonika. Indeed, very few countries, even those with much larger populations, have a comparable number of periodical publications that maintain a remarkable regularity. In addition, my colleague was also impressed by the local newspaper of Kythera and Antikythera, KYTHERAIKA, which this year entered its 37th year of continuous publication, offering an invaluable service to the island.

Nearly 100 essays and articles appear in the almost 3,500 printed pages of Nostos' 10 volumes. These are often lengthy and thoroughly documented, covering a wide thematic range including (but not exclusively) Kytherian mythology and ancient grammatology, secular and ecclesiastical history, archaeology and art history, prosopography and genealogy, historical geography and topography, monumental surveys and fortification studies, sociology, economic history, demography and statistics, medieval and modern grammatology, philology, literature, linguistics-etymology, archival studies and palaeography, literary education, and philosophy. Moreover, the reader will find important contributions on medicine, meteorology, and technological developments. One only hopes that the positive aspects of technology may prevail, as our planet and our lives, particularly those of our descendants, are in peril due to its misuse and uncontrolled exploitation.

Thus, with the volumes of *Nostos*, we possess a veritable Kytherological (with additional topics) "Tipoukeitos," a term from Byzantine legal studies signifying "all that lies where it could be traced." I am particularly honoured and pleased to have recently submitted to this prestigious journal some thoughts and historical notes pertaining to the Byzantine and Latin-dom-

inated historical periods of the island, which has been a "second home" to my family for the last 49 years. In 1975, my late father, George C. Savvides (1920-2005), bought the Skoulianika rampart, which he gradually transformed into our summer house. He regarded Tsirigo, especially Livadi, as a "Paradise on Earth" and departed for his final journey nineteen years ago with the word "Tsirigo" on his lips.

I was recently informed that with Volume 10, an editorial cycle of the journal, which has significantly contributed to Kytherological studies, is coming to an end. I can only express my most sincere wish that there will be a way to continue this great scientific contribution to Tsirigo, its history, and its culture. There are still publishers in our country who recognize the long-term importance of maintaining the publication of important journals, often in productive collaboration with distinguished scientific associations. To this end, it has been announced by the president of the Society of Kytherian Studies, Kaiti Aroni-Tsichli, professor emeritus of Panteion University, that the Society will undertake the continuation of the publication of *Nostos*.

Congratulations are due to the Association of Kytherian Academics for their outstanding scientific contribution, which benefits not only our country but also Hellenism as a whole. The same applies to the Society of Kytherian Studies, which is already celebrating 42 years since its foundation in 1982, with an impressive series of publications known to all of us.

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**Philip Abrams**, *Historical Sociology*, Ithaca: Cornell University Press, 1982, xviii + 353 pp.

The book of Philip Abrams *Historical Sociology* (1982) is the first meaningful attempt to sociologically study the conception of *change* through the particular social processes unfolding in historical time. These processes are also the ones that can make the very conception of change better understood. In the thought of Abrams, historical time is a determining factor in sociological analysis. When not taken into account, what is left is a general description of

static structural schemes and patterns. Accordingly, social class for Abrams is not a static paradigm, but a dynamic element, which is directly linked to historical and social facts. This principle should be common to both disciplines of sociology and history despite their discerning differences.

His work –the last one before his death– was published at a time of a flourishing publication scene with books and articles which tried to define theoretically, methodologically, but primarily epistemologically, the subject of historical sociology. Abrams' book, in continuation of his articles, is among the first ones (Tilly, 1981; Skocpol, 1984) to deal with the epistemological delimitation of historical sociology (Abrams, 1972; 1980). He was particularly concerned by the relationships between the scientific disciplines of history and sociology (Burke, 1983: 905), and he approached historical sociology as their main "meeting" field. Furthermore, Abrams was among the strong critics of the Parsonian model which dominated post-war British sociology, and of the fact that sociology had "withdrawn from history" (Vafeas and Kouroublis, 2013: 13-14). The influence of C. Wright Mills is evident here: Ahistorical studies are static or restricted in terms of historical spacetime. Large structures are understood only through their changes, when the scope of observation of these changes is widened enough to include their entire historical extent. Understanding structure requires that social sciences function as historical sciences (Mills, 1985: 237).

Chapter 1 sets the fundamental problem that Abrams deals with in his book, which is the need for a constructive dialogue between the two disciplines: history and sociology. He develops his main thesis that it is not possible for sociological questions to have non-historical answers. He goes through some of the theories of the classics (Marx, Weber, Durkheim), as well as the subsequent macro and micro sociological approaches which focused on the transition from the pre-industrial to the industrial world. Sociological analysis presupposes that the relationship between structure and action has been addressed as a fact of the historical process (Abrams, 1982: 1-17). He devotes three consecutive chapters (2, 3 and 4) to the development of the capitalist system and draws the main key points from the theories of the "founding fathers of sociology", which are of particular interest to historical sociology (ibid: 18-107). Chapter 5 focuses on Talcott Parsons and on the reasons why his structural-functional evolutionism is not historical sociology (ibid: 108-146). Chapter 6 examines case studies dealing with the forma-

tion of political systems or states, including Anderson, Lipset and Rokkan, Eisenstadt, Moore. Despite their different approaches, they all attempt to encompass social theory and a historical perspective (ibid: 147-189).

In Chapter 7 he reintroduces the question of a methodology for historical sociology. Both disciplines should deal with the events that have historically led to social change. Returning to Mills he points out that the mechanisms of change vary depending on the social structures being examined. It is not a given that an event will definitively lead to a change or to the same change in each and every structure. The reference to Mills demonstrates clearly his position that historical change is a change in social structures and in the relationships that articulate the constitutive elements of social structures (ibid: 190-226). In Chapters 8 and 9 (ibid: 227-266, 267-299) he concludes that questions dealing with individuality could be better explored by disciplines other than historical sociology. In Chapter 10 (ibid: 300-335) he continues his analysis on the limits of historical sociology, linking it further to Chapters 1 and 7. In this last chapter he insists that the distinction between history and sociology depends primarily on the type of questions posed and the theoretical strategies employed to pose these questions. The point that brings history and sociology together is *structuring*, which leads to two key questions: 1) How and why something happens. This has to do with *contingency*. 2) How the world really was or is at a given moment: before and after. This has to do with *comparison*.

For Abrams, it seems unproductive to debate whether the disciplines of history and sociology should converge, let alone unify, which has at times caused heated debates between historians and sociologists. From his perspective, history and sociology are actually concerned with the same thing. They both want to comprehend human action in depth, and this is realised through social structuring. Sociology must be concerned of the facts, because this is how structuring makes sense. On the other hand, history is not the only one that is legitimised to deal with the facts for the purpose of objectively explaining things. Accordingly, access to theory is not sociology's exclusive prerogative (ibid: xx-xi).

It is interesting how he uses social class as a paradigm to make his thought process even clearer (ibid: 33-72). Class is not a thing, i.e. something static, but a relationship. Even more, it is a dynamic element, since it is a historical relationship, a fact and not a structure, i.e. something that is stationary

in time (ibid: xi, 71-72, 217). For Abrams the concept of class contains the concept of historical relationship, which is embedded in a real social context and concerns "regular" people. In an analogy with the factory in Thompson's (1963) book, he observes that it is not just a place of production, but also how machines work, how people of different incomes, hierarchies and statuses work within the same place of production. Thus, for Abrams, a social scientist, a sociologist or a historian will be able to observe the common points of interest, but also the points of conflict between individuals. Class is shaped socially and culturally over time and cannot be defined abstractly or by detaching it from other elements. For Abrams, class is a fact and accepting its historicity should be equally about history and sociology.

In summary, "how something is done" is the best way for Abrams to discover the real structure-action relationship; how structure affects action, and how action affects structure. This does not happen in a context of concepts that ignores historical changes. History is central to sociology, as both the structure and the meanings attributed to our social world are closely linked to the action registered in historical time.

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**Antony Heath and Yaojun Li,** *Social Mobility*, Cambridge UK, Hoboken, USA: Polity Press, 2024, 226 pp.

In a period marked by successive crises, growing occupational inequality, and increasing labour market polarisation, opportunities for social mobility have become fewer and, in some cases, stagnant. At this critical juncture, *Social Mobility*, an important book by Anthony Heath (CBE and Emeritus Professor of Sociology at the University of Oxford) and Yaojun Li (Professor of Sociology at the University of Manchester), offers a historical and comparative review of patterns and trends in social mobility, focusing on key dimensions such as gender, race, and ethnicity.

The book is structured around nine chapters that explore: the significance of promoting social mobility; a brief history of mobility research; intergenerational social class mobility in the 20th century; economic literature on

income mobility; gender and the mobility research in the 21st century; race and ethnicity as entrenched disadvantages; occupational change from the Medieval period to the 21st century; and the factors that determine 'Who Gets Ahead and Why.' The book concludes with a discussion on the individual and collective consequences of social mobility.

The introduction of the book is framed around the fundamental question 'What is Social Mobility and Why Does it Matter?'—a question that has long been a central concern in sociology. As the authors explain in Chapter 1, high rates of social mobility can be viewed either as a hallmark of a modern egalitarian society or, conversely, as regressive when the less privileged are hindered from advancement. Nonetheless, promoting social mobility is crucial for several reasons: *first*, for moral reasons, emphasising fairness by treating individuals based on their merits rather than personal characteristics; *second*, for efficiency, as reducing discrimination and exclusion can enhance productivity; and *third*, for socio-political reasons, as addressing immobility and social closure helps to prevent discontent, class conflict, and political instability.

In contrast to the promotion of social mobility as a central policy objective, critics prioritise the 'brute fact of class,' viewing social mobility as a secondary concern. Critics also argue that both upward and downward mobility will occur, potentially leading to psychological and material consequences that may lower overall well-being. Moreover, those trapped at the bottom of the social ladder grow increasingly disgruntled due to repeated defeat, coming to view the rewards of success as something they are entitled to but unfairly deprived of. According to the authors, this argument, originally presented by Marshall (1938), foreshadowed the key finding of the foundational study of relative deprivation (*The American Soldier*, Samuel Stouffer et al., 1949). Specifically, morale tended to be lower in units with higher prospects of promotion compared to those with lower prospects of promotion.

In defining social mobility, the authors focus on the core of the concept, which concerns the processes of recruitment to different social positions—specifically, the extent to which privilege is inherited and how disadvantage is passed down. Social mobility refers to the movement between different positions within a society's system of social stratification, which can occur either within a person's career (intragenerational mobility) or

across generations (intergenerational mobility). Existing empirical literature primarily focuses on vertical intergenerational movement between more and less disadvantaged positions. Contemporary sociologists, such as Bukodi and Goldthorpe (2019), focus on movements between broad occupational classes, while American sociologists like Blau and Duncan (1967) examine movements along the socio-economic status scale. Early sociologists, including Pareto (1916) and Sorokin (1927), concentrated on access to elite occupations. Despite varying approaches to classifying social class, most sociologists agree on using occupations as the main building blocks, placing secure, high-paying jobs at the top and insecure, low-paying jobs with poor working conditions at the bottom.

In Chapter 2, the authors provide a brief history of social mobility organised into three consecutive phases:

(a) *Beginnings*: This period spans from Plato's theory of social selection and Aristotle's ideas on social stratification and inequality, to Marx (1852), Sombart (1906), and Michels (1927), who focused on the potential for organised class action, often constrained by the opportunities for upward mobility. Only Pareto (1916) concentrated specifically on social mobility and recruitment from lower classes to ensure the continual succession and circulation of ruling elites.

(b) *Growing up:* Represented by Sorokin (1972) who established many of the key themes in the study of social mobility, including the implications for class conflict and solidarity, patterns and trends of mobility, and the channels through which mobility occurs. He argued that periods of relative mobility are often followed by periods of stagnation. Sorokin's empirical work primarily focused on elite recruitment, emphasising occupational background and intelligence as key factors.

(c) *Coming on age:* Marked by the evolution of survey research on mobility, this phase is characterised by large representative cross-sectional surveys of populations and the categorisation of occupations into social classes examining the cross-tabulation of fathers' and sons' social positions. Notable works include Lipset and Bendix's (1959) comparative cross-national study and Blau and Duncan's (1967) path models of occupational attainment, which utilised socio-economic status scales. Significant advancements in research methodology followed, including Erikson and Goldthorpe's (1992)

study of European countries, which, using large-scale data, supported the 'constant social fluidity' thesis.

Chapter 3 examines the concepts and methods used by sociologists to study social class mobility, drawing on data from contemporary Britain. It explores theories and research that explain why social mobility rates vary globally. The focus is on occupational intergenerational mobility, as occupation is a key indicator of one's position in the stratification system, reflecting long-term advantages or disadvantages. Conceptually and technically, the authors distinguish between absolute mobility rates, which measure the proportion of upward and downward mobility, and relative mobility rates, which capture individuals' positions in the queue based on different social backgrounds. Chapter 4 presents the economists' approach, which focus on income mobility to demonstrate the strong link between intergenerational persistence and income inequality. However, despite the insights economists provide on rising inequality, their approach tends to overlook the importance of structural change and key sociological findings, particularly the high degree of class reproduction (p. 71).

In Chapter 5, the authors provide an overview of women's evolving social position, highlighting their gradual entry into elite and more advantaged professional and managerial occupations of the salariat. In terms of mobility patterns, studies have shown no major differences in relative mobility between men and women (DeJong et al., 1971), but significant differences in absolute mobility rates (Tyree and Treas, 1974). The authors argue that there is greater fluidity among women than men, particularly in intermediate occupations, reflecting a lack of opportunity rather than true equality of opportunity. Discriminatory and exclusionary processes in the labour market, along with informal barriers tied to flexible and part-time work, limit women's opportunities and explain why their occupational distributions and mobility rates differ from men's.

Chapter 6 examines mobility studies of ethnic and racial groups in relation to the dominant majority, focusing on how these groups began at the lowest rungs of society and gradually moved upward as they assimilated into the host society (Warner and Srole, 1945). The case of first-generation Irish immigrants is particularly relevant, as they were initially concentrated in the lower occupational strata of Yankee City, but the second generation moved into middle-class positions, and the third generation gradually converged

with the broader American population. A comparison of migrant progress in the 1970s and 1980s with that of the second generation in the 1990s and 2000s shows a 'pattern of migrant disadvantage followed by second-generation progress' (p.115). While it is expected that the mobility prospects of minority groups would resemble those of the dominant group, racial discrimination and persistent inequalities, coupled with restricted social fluidity, slow the pace of convergence.

In Chapter 7, the authors examine occupational changes from the Medieval period to the 21st century, providing insights into trends and rates of social mobility over time and across the world. In Chapter 8, they explore the factors that contribute to the persistence of advantage or disadvantage, seeking to understand why some individuals experience upward mobility while others do not. These factors include genetic traits, family resources, social networks, various forms of capital, meritocratic processes, and barriers such as social exclusion and discrimination. Finally, in Chapter 9, the authors conclude that while individual experiences of mobility can be disruptive to well-being, the broader effects on economic growth and political stability are generally positive. However, there is little evidence that mobility trends significantly impact class formation or class conflict.

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