Employment and labour market policies for an ageing workforce and initiatives at the workplace

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National overview report: Greece

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Part I

1. Main characteristics of the evolution of the company case studies over the last decade (expansion, narrowing, extension, abandonment)

The companies examined exhibit considerable differences in terms of their evolution over the past decade, with a related impact on their HR policies. In the intervening ten years a new generation of owners has taken over family firms, introducing them to the stock exchange, to international business and investment and the world markets.

Overall of those companies contacted, four had been taken over by international companies; one was preparing to move operations over the border; five Greek companies and organizations had expanded nationally and/or internationally; two internationally owned Greek companies had expanded their businesses in Greece; one internationally owned company in Greece had sized down, while two other Greek companies were in the process of downsizing or closing; finally two Greek companies had remained static. Company economic expansion has, in most cases, not meant an expansion in the labour force in the local company. The continuing introduction of new technologies and new forms of management and organization over the past decade, has led to continuing restructuring in production units and administration; this has meant a reduction in the demand for labour in specific departments or sectors though also expansion in other sections of the company's operation. Thus the well known European phenomenon of what appears to be jobless growth has been common. The original selection of companies focused on those with good practices towards older workers, and not surprisingly in most of them the path of retraining and redeployment of older workers into other work positions was taken, rather than redundancies. This HR practice continued to be of benefit to older workers, though it was not so much the result of an explicit policy to support older workers but rather one of commitment to the long term employment of their employees.

Companies which have a parent company abroad or which have expanded into international activities e.g. USA, UK, France, have developed sophisticated HR policies that relate to non discrimination, corporate diversity and equality. Greek HR managers and representatives of the Works Councils agreed that local HR policy derived from directives of the international parent company.

Most strikingly the seven companies interviewed that had expanded their economic activities in the past decade have, in all cases, adopted explicit equal opportunities policies, which was not the case when they were interviewed a decade earlier.

2. What are the main impacts of measures/initiatives at the company level (e.g. benefits to older workers and benefits to employers, any unintended consequences)?

In all the cases contacted and in all organizations and companies interviewed there was not one with an explicitly designed policy for older workers. A decade earlier this had also been the case though they had all had substantively good practices towards older workers at that time. Effectively there has been no substantive change in these companies towards their older workers in practice, though new HR policies have been developed. The most common policy described was the Equal Opportunities policy relating to the recruitment, promotion and training of employees in terms of their individual capacities and which explicitly forbids discrimination on the basis of age, gender, ethnic origin etc. This HR policy has benefited older worker, since age cannot be used as a criteria for exclusion, but employers may discriminate using other objective criteria e.g. productivity, need for training, demonstrated abilities, redundancy of positions. Thus older workers are not at risk as a category, but rather individuals of an older age may still be at risk of not being hired or promoted.

The prevalence of a Greek corporate culture together with the small size of firms that permits the development of personal relations between employees and management /owners, tends to favour older workers and ageing is not perceived as a problem in itself.

In several companies there has been a move from payments which took seniority into account i.e. increasing bonuses on a seniority basis, to ones based on productivity. Despite extensive company HR records providing profiles of their employees, e.g. level of education, numbers trained, years of service, none kept records of participation by age or gender in training, claiming that the Equal Opportunities policy they had adopted forbid such forms of discrimination and was no longer relevant.

One of the unintended consequences of the adoption of such policies is that older workers are no longer assumed to be worth more with more years of service. Each individual has to prove his/her worth and gains promotion and bonuses accordingly. In terms of recruitment older workers with skills and knowledge are no longer at a premium and have to compete with more highly educated younger people.

3. Driving forces for implementing good practice at the company level (Please make special reference to the influence of public policy, e.g. legislation or financial incentives, and collective agreements – at national, sectoral or company level – if applicable)

National public policy has continued over the past decade to try and protect older workers. There are publicly funded financial incentives for hiring older unemployed workers, and financial disincentives for firing older workers are still in place, which mainly consist of the high costs associated with making older workers redundant.

The trades unions at National (TUC) level and at sectoral level, are concerned with the increasing rate of long term unemployment amongst older workers, and strongly defend the rights of older employees, with strikes and demonstrations against closures and changes in conditions of employment. Collective agreements are particularly important in the state sector and affected the Public Power Corporation, where only one in three employees are under the age of 40.

However it is doubtful whether such protective policies, with the exception of the PPC, have been the main motivator for good practice in the companies studied. Company HR culture and attitudes that treats long serving older workers as a loyal, productive element has necessarily implied that despite technical innovations and organizational changes, these companies have focused on policies for the retention and development of existing workers.

Wage policy is, overall, dictated by yearly agreements between the trades unions' and the employers' federations at national and regional levels. However companies may chose to implement additional wage payments in the form of bonuses or extra salaries. In the past companies allocated bonuses usually on the basis of seniority, which tended to favour older workers. A significant change over the past decade is that the majority of companies interviewed have switched to productivity bonuses instead of seniority.

The availability of national and EU funding that encourages companies to undertake training and operate specialised training centres (KEK) has been a major policy change that has permitted many of the companies to give even more resources and stress to training and, in some cases, to implement training more formally. Older workers have not been excluded from training, although no specific figures were available as companies do not keep records on this basis, claiming that Equal Opportunities policy forbids discrimination.

Policies to promote health and safety in the working environment, strongly supported by trades unionists and Work Councils, and participation in European programmes for health and safety, plus the adoption of industry standards have been strong motivators for many actions by the enterprises in the field of improving the work environment: such actions have de facto benefited older workers. While not a policy directed at older workers, success in improving health and safety records depends on companies taking into account the ageing of their existing workforce.

4. Which characteristics of particularly successful measures/policies can you provide? (Please provide short exemplary description of individual cases)

Successful initiatives include

- Benchmarking: implemented by the PPC, this involves identifying best industry practices that will lead to superior performance, allowing all workers to plan on how to improve productivity by examining existing best practices and seeing how they can be applied in their working situation. The benefit for older workers is that their long experience may be useful in the discussions concerning the methods to be used in improving productivity and performance. Training is then designed in accordance with the designated needs of each sector and this occurs irrespective of age.
- Cyclical work: Delta Industries promotes flexibility in many of its factory production units. The production chain has specific tasks which require different physical movements e.g. standing/sitting, reaching, lifting up; in order to relieve the strain and boredom of repeated tasks, employees perform each task in the chain of production for a limited period during each day, gradually moving around the circle of production. This aids older workers who are no longer excluded from participation on production since no physical task has to be done for a long period. The same practice was applied, though the term was not used, in the Intercontinental Hotel, where employees were periodically, during the year, moved to new tasks throughout the hotel.
- Kiosk: International energy company has developed a central electronic information system, called a Kiosk, concerned with the management of HR. All employees are trained in the use of this system which contains records of their work, training, employment rights, holiday and sick leave, and assessments of their work which they can use for their personal development. The objective and interactive nature of the Kiosk allows older workers to trust that the company is not basing their evaluation on age but on other criteria which are publicly visible and accessible.
- Flexible working conditions: International energy company permits administrative and executive staff to have flexibility in terms of hours and place of work. This is of particular benefit to older workers who can work at their own pace and sometimes in hours that suit them.

5. Which key lessons can be drawn from implementing measures and initiatives cases (e.g. role of actors, main reasons for success or failure, innovative features)

A key factor in changes in companies' handling of older workers has been the substantive improvement in their educational level, making it far easier to ensure that they can be retrained when necessary. While the education levels of Greek employees still tails behind that in most other EU states, the improvements allowed Greek companies to deal with older people together with younger employees. Age is not, per se, the issue in many work contexts but educational level.

Nonetheless, the one company attempting to introduce discretionary e-learning reported lower participation by older workers.

Training was assessed by all the companies as an effective measure, reflected in increased productivity, competitiveness, profitability. This contrasts with the situation of most Greek companies who have invested very little in training,

especially of older workers, the lowest percentage amongst the EU 15 MS. With the exception of some training in health and safety measures, most training programmes have been initiated by the companies. In some cases the role of employees in suggesting training needs is a factor in their success and acceptability. The relative disappointing performance of older workers in the one case where e-learning was introduced may reflect the passive and impersonal nature of such learning.

The introduction of new technologies has reduced the physical content of many production tasks, and this has allowed many companies to retain older workers, after retraining, and to give some priority to recruiting more women.

Exit policies for older workers have not altered in the last decade. (See policy and legislation) Self employment in the current Greek labour market has become risky and is no longer chosen by older workers. The example was clear in the case of Titan which a decade ago had promoted the self-employment of redundant employees, and found it was no longer attractive to older workers.

6. What are future issues concerning age-management raised at company level? (problems not resolved in individual companies so far, challenges faced etc.)

The promotion of equal opportunities policies in various guises (the promotion of cultural diversity, non discrimination policies) has the consequence that employers do not have to specifically examine age related issues.

The overall ageing of the workforce was not perceived in itself as a problem, but of concern was how the company could achieve a reasonable age balance. This required the hiring of young employees but was difficult because of the commitment to retaining the older work force and the lack of job openings. Recruiting personnel at all levels of skill and qualification is not an issue in any company.

Unresolved problems relating to older workers were evident in companies which had adopted policies of retaining older workers until retirement. In some cases this meant bearing the cost of less productive employees, mostly older and of low education.

In some cases enterprises reported situations where older workers approaching retirement showed no interest in training and the HR Department had to think of various ways to motivate them.

Part II

I. Perception of demographic/labour market issues in national policy over the last decade and development of national policy concerning an ageing workforce (employment policies incl. legislation, pension reform etc. and influences of EU-policies/programmes)

Demographic developments

The main debates on the demographic ageing of the Greek population have been conducted primarily in terms of the low birth rate. Little attention has been paid to increased life expectancy and the increasing numbers and proportions of pensioners in the population. "Ageing" has mainly appeared in Greek political and academic debate in terms of the "threat" it represents to the viability of the pension system. Ageing has been rapid in the Greek population, with low fertility rates and improved mortality. The proportion of young people age15–24 in the population is expected to decline during the next fifteen years by a quarter. In contrast the population aged 55–64 (currently 1,2 million) will rise by 13% over the next 15 years, while the corresponding rise for the population 65 and over, is expected to be even higher (20%). By 2000, the old age dependency ratio had risen to 25,6% (22,8% in 1995), and by 2010 it is estimated to rise to 29,2%. Greece, Germany and Italy will be the countries exhibiting the highest old age dependency ratios of around 30% by 2010. (Karantinos 2003)

Labour Market issues

The Labour Force Survey (National Statistical Service) shows that although activity rates decline with age, there is no sudden drop until the age of 60. The activity rate of the 55–59 age group is similar to that for all age cohorts, but declines as retirement age approaches (60–64 years of age), with a further and abrupt drop for those in the age group 65–69 years. Over time, the activity rate of those 65 years and over has been declining while the activity rate of those aged 55–64 showed no declining trend through most of the 90's.

The restructuring of the labour market and, specifically, the decline in agricultural employment has particularly affected older workers. Older women remain active in farming, in the public sector and service occupations. During 1998–2002 there was a slight decrease in unemployment except for those aged 55–59 who also suffer from long term unemployment. (NSSG 1999)

Politically the main issue is how to improve the unemployment rate; however the high inactivity rate has meant that as and when opportunities arise more people, particularly women, have entered the labour market and thus the decline in the unemployment rate has not been noticeable over the past ten years.

Non labour market activity in the age group 40–60 reflects men's ability to take early retirement and a pension, while for women family obligations and the threat of less favourable terms for receiving an early pension, push older women out of the labour market.

The major changes occurring in the labour market reflect

- 1. increased competition internationally and the place of Greece in this.
- 2. the introduction of new technologies (INE-GSEE 2005) in all areas of production and enterprise that have altered the content of work and the skills needed, as well as numbers.

Any serious academic research has mainly been done on this subject either directly for EU institutions or to satisfy EU institutions.

² See, European Commission (2002): The Social Situation in the European Union.

³ Source: Eurostat – Demographic Statistics, baseline demographic scenario, projection 1995, revision 1999.

A major difference with other EU countries is the very high level of self-employment in Greek where it constitutes an especially large share of employment (43,8%) for older workers, compared to the Community average (16,6%) (NSSG 2002).

Greece has few large units of production (in terms of the number of employees). 64,6% of the employed in Greece work in establishments employing less than 10 people, while in the Community only 36,1% of the employed work in such small firms (EFLWC 2001). 7.5% of employees in Greece work in firms employing over 250 employees compared to the Community average of 16,5%. The international debate on new forms of work organisation has developed within the context primarily of larger firms (having more differentiated and institutionalised structures of firm governance and human resource management) and the data on the small size of Greek businesses may indicate one of the reasons why the development of new forms of work organisation has been little debated.

The importance of personal relations in the Greek labour market and the differences in the situation of older workers is reflected in part in statistics showing that 16,7% of the employed in Greece worked for the same company for 30 years and more, against 5,9% of the employed in the European Union with the same job tenure. (PAEP 2003)

Policy and Legislation

In Greece there has been no substantial debate about older workers, as a specific category in the Greek labour market, over the past decade. The major policy of all governments, supported by trade unionists, has been the protection of older workers. Currently the major policy debate of relevance to older workers is that concerning the social insurance and pension funds. A recent OECD report⁴ shows that demographic ageing will soon make the social insurance funds insolvent. Both the previous and current Governments have been debating with the social partners on how this can be confronted. The major direction of government policy and debate is to consider how to raise the activity rate in employment; one proposed method is through the increase in the effective retirement age. Another debate concerns the definition of heavy and unhealthy work. In a large number of industries and services, trade unions had fought for the right for early retirement; currently all are under review and there is a large acrimonious debate between the trades unions and the government. Workers in jobs defined as heavy or unhealthy can leave after 15 years of service at the age of 60 years. The subject of current debate and conflict is the increase of this to a minimum age of 65 years.

The current government's intenetion to privatise many of the Greek publicly owned industries and to remove security of tenure in all public employment is being met with strong resistance by the trades union movement, most strongly organised in the public sector.

Under current legislation the age limits for pensions are as follows:

- all employees in the private and public sector can receive a pension after 15 contribution years and at the age of 65 for men and 60 for women,
- Men may receive a reduced pension at the age of 60 and women at 55 in the public sector, in public utilities and banks, after the completion of 25 contribution years, after 1st January 1998. In the public sector, public utilities and banks, working mothers with children under age and working widowers with 3 underage children, after completing 20 years of contributions to the insurance funds, receive a pension without any age limits.

Working mothers recruited after 1st January 1983 in the public sector, in public utilities and banks, and who have completed 25 years of contributions including possible contributions when employed in the private sector, can receive a full pension at the age of 50.

⁴ OECD (2005) Economic Survey of Greece, July 2005.

There are regulations by the Ministry of Employment and Social Protection concerning the redundancy of employees. There are time periods when the employer cannot dismiss the employee e.g. when a women is pregnant and one year after the birth (article 15, Law 1483/84), trades unionists (Law 1264/82) group redundancies (Law 1387/83). Redundancy payments are based on the level of salaries/wages in the last five years of full employment; given seniority increases this makes it more expensive to make an older worker redundant.

European legislation has had an impact on Greek employment policy. The recently passed Law 3304/2005 under Regulation 43/78/2000 secures equal treatment in the labour market and covers age as one of the bases for non discrimination. This was incorporated into Greek law from the European Directive 2000/43 concerning equal treatment and non discrimination on the basis of religion, sexual orientation, beliefs, disability, national origins and age. In the case of recruitment this new legislation will change the longstanding law in the public sector which stated that those recruited had to be less than 35 years of age. The exceptions for employment on the basis of age are quite extensive and the implementation of the law has not yet effectively started. No test cases on the basis of age have been taken to the courts yet.

The Ministry of Employment and Social Protection under Law 2434, referring to measures concerning employment policies, states that in collaboration with IKA (Urban Workers Fund) and OAED (Organization for Manpower and Employment) special health provisions are available for older workers over 55 years of age; such provisions are also available for the long term unemployed. A further law, 3174/2003, concerning the provision of social employment, e.g. social care, foresees in Article 4 the recruitment of people from older age groups, along with others considered to have special social characteristics e.g. unemployed, disabled. In Article 2 of a further Law 3227 (2003) concerning unemployment and increasing employability, there is provision for incentives to employers to hire those aged 55 + who have completed at least 6000 days on insurance (i.e. over 18 years of contribution); it provides a subsidy to the employer taking on an older workers that equals 50% of the employer's contribution to the social insurance funds.

II. Relevant actions of social partners and other key actors: Policies and practices

The social partners are organised nationally and regionally into committees for social dialogue. The Economic and Social Council is the main body where discussions on issues affecting the labour market are debated and, if necessary, arbitrated. However there has been virtually no debate on the issue of older workers as a separate issue from the more general issues of pensions, training, redundancy payments and social solidarity measures to ensure the completion of contribution years.

All the social partners, for very different motives, are concerned with the protection of the rights of older workers. Employers have wanted older workers to continue to have the various privileges that enable them to leave the labour force earlier because they are more expensive and less educated than potential labour replacements. Trade Unionists, on the other hand, have wanted to ensure that older workers do not lose the right to early exit from the labour force, since this is in accordance with the desires of their members⁶. One should note that many people, on retirement, enter into self employment and even more commonly into the very extensive black labour market. Governments have primarily been concerned with the social protection of older workers, with the support of the electorate. Thus the extension of the right to early retirement because of the definition of the work as heavy and/or dangerous has continued to occur despite the changes in the manufacturing sector which has seen a decline in heavy employment⁷. Thus previous agreements for early retirement (for women, for those in 'heavy' industry) have come to haunt all governments.

⁵ This may reflect the weak development of civil society and organizations to defend the interest of older people.

⁶ In 2001 the head of the TUC (GSEE) stated a golden mean was needed in the debate on postponing the age of retirement since if older workers stayed in jobs they blocked the employment of younger workers.

⁷ Though the report in the "Third European Working Conditions Survey 2000" EFILWC 2001 points to the increase in stress and other hazards.

The main push for reform on the issue of older workers comes from the agreed EU policy to increase employment levels; this cannot be done without confronting the issue of early retirement.

Older unemployed workers have not yet formed self help organizations; actions have been concerned with the individual getting the right number of insurance contributions rather than any collective action.

Thus the key actor is the EU itself which is pushing for labour market reforms from all member states, though with the agreement of the Greek government of the time. Another main factor in forcing the social partners to reconsider the current protectionism of the Greek labour market is international competition, especially from Easter Europe. Investment by Greek employers in nearby countries has been particularly high since the same labour market restrictive practices are not in force and wages are lower.

Another arena where European policy will affect older workers is the implementation of the non discrimination legislation. Although, as discussed in Part 1, some organizations and enterprises have been proactive in developing such equal opportunities HR policies, there has been no focus or explicit debate on how this will affect older workers. One should note the lack of legal expertise and case studies on the situation of older workers in Greece.

III. Status of the issue of older workers in current policy and public debates – identification of future issues

Social protection remains a key value amongst Greek citizens, and is of particular importance to older workers and their families. However, it makes the reform and the liberalisation of the Greek labour market very difficult since the political cost for all the Greek social partners is high and there is great reluctance to discuss the issue of demographic ageing, protectionism and international competitiveness..

The low levels of capital investment by Greek and foreign capital and the closure or removal across the borders of many Greek industries which cannot compete on a cost basis with the wages payable in Eastern Europe, has led to a decline in employment in Greek industry, a phenomenon which has become particularly clear after the completion of the Olympics related projects in 2004. An estimated 100,000 jobs have been lost; evident in the textile industry with 30,000 job losses and 15,000 in IT. Redundancies have not occurred on an age basis though older workers with long term service have been particularly affected since they have come to predominate in some economic sectors such as textiles. Solutions to these problems, originally met through public incentives to employers to keep on older workers through subsidies, are no longer feasible. Pressure on the government is now forcing them, supported by the OECD and EU, to contemplate unpopular ways of 'liberalising' the labour market e.g. increase in part time employment, flexible work contracts, the facilitation of legal work after retirement, removing restrictions on opening hours for shops, and removing many industries and organizations from public ownership with the consequence of removing employment contract security for employees. The current conservative government is undertaking such reforms, though some kinds of labour market reform would have been forced, reluctantly, on any government. The virtual absence of public debate on the issue of older workers thus reflects the much greater concern with the defence of jobs. Though some mention is made in the media about the demographic ageing of the labour force, it is not on the public agenda. The defence of accrued rights and protectionism remain the main issues rather than attempts to debate the implications of an ageing labour force.

The fact that women with under age children are still able to leave the labour market with a pension (reduced or full) explains some of their lack of concern with age related issues. The abolition of these gender privileges will come into conflict with the low wages (at the age of 50–55 dependent employees earn half the wages of men on average-IKA statistics) and position of women in the labour market. This may motivate them to participate more actively in the issues

of older workers employment. Older men at all skills and educational levels have, in contrast, experienced more significant problems in the labour market over the past 10 years.

The lower educational levels of Greek older workers, compared with most EU countries, and the abolition of secure employment will make them increasingly vulnerable in the future labour market. Current levels of investment in training will not rectify this and life long earning is still not being implemented. Whether self-employment can be the solution is dubious, due to the changing economic climate and increased competition.

Annexes

Annex 1: List of interviews per case study ⁸

Number and name of case	Quantity of Personal Interviews ⁹ Function of interview partner		
GR001 Film processing company	2	Compensation and Benefits Supervisor. Head of the Works Council	
GR002 Shellman	3	General Manager of Administrative Services, Head of the Works Council 2 employees	
GR003 Klostiria Naoussis	1	HR Manager	
GR004 Aluminium of Greece	3	HR Manager for the Group, Assistant HR Director the Group, Branch Personnel Officer	
GR005 Intercontinental Hotel/ Athens	1	HR Director	
GR006 City Bank	2	HR Manager Bank Employee	
GR007 Delta A.E	3	Quality and Training Manager, Employee in Milk Production unit Administration Director	
GR008 Kallas Salt Manufacturer	1	HR Manager	
GR009 Hellas Can-	3	General Manager, Administrative Manager, Employee in Production	
GR010 Titan A.E.e	2	HR Councillor, HR Manager for Greece	
GR011 PPC (National Electricity Board)	2	Training Manager HR Director	
GR012 International energy company	2	Retail HR Manager Employee - Technician	

This information will be used to understand if the case has been discussed with all parties potentially involved or not (management, unions and workers)

This number does not include follow up phone calls.

Annex 2: List of European Foundation cases originally listed but not included in field work: reasons of refusal/rejection ¹⁰

Name of company	Reasons for refusal/rejection (please indicate from section below)			
	No contact because	General reason, because	Measure related, Because	
Phosphorus Fertiliser Industry (previously Chemical Industries of Northern Greece)			Measure not judged as been good practice at all/substantial enough No good practice today - early retirement only Change of ownership	
Petsetakis A.E		No time/interest for research/other business to do		
Klostiria Naoussis A.E.*			Insubstantial information and about to close down and move to a neighbouring country.	
Colgate_Palmolive	Other (not contacted since has entirely US based policy. Same as other companies e.g. Film processing company, International energy company, Hellas Can			
Slavenitis A.E.		No time/interest for research/other business to do		
Chrotex A,E,		No time/interest for research/other business to do		
Bauxite Parnassod AE	Company ceased to exist (bought out)			
Halkor AE		No time/interest for research/other business to do		

¹⁰ This information will be used to assess, if the access was not possible for general reasons or if mainly failure of the initiative as such was responsible

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