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RÉSUMÉ

Le but de cette étude est d'examiner comment les idées de la «théorie du capital humain» ont été utilisées par les hommes politiques grecs dans le cadre de la réforme éducative de 1997-1998. C'est cette la réforme éducative qui a formé l' éducation contemporaine générale et technique-professionnelle en Grèce. Utilisant la méthode d'analyse du contenu qualitative, nous tentons, sur la base de sources originales (débat parlementaires), de répondre aux questions suivantes: Quelles forces politiques utilisent l'argumentation du capital humain? Qui sont les sujets éducatifs, qu'utilisent l'argumentation du capital humain? Quels sont les buts des références au capital humain? Y a-t-il des différences idéologiques, ou autres, tant parmi les différentes forces politiques que parmi les représentants du même parti quant à utilisation de l'argumentation du capital humain? Si oui, de quel type sont ces les différences?

MOTS-CLES: théorie du capital humain, la réforme éducative, argumentation politique, éducation technique professionnelle

ABSTRACT

The purpose of this study is to investigate how the ideas of "human capital theory" were used by Greek politicians in the framework of the 1997-1998 educational reform. This is the educational reform that shaped the contemporary Greek general and Technical-Vocational education. Employing the method of qualitative content analysis, we attempt, on the basis of original sources (parliamentary debates/minutes), to answer the following questions: Which political forces use human capital argumentation? Which are the educational subjects rising from the use of human capital argumentation? What is the "role" of human capital references? Are there ideological or other differences so much among the different political forces as among representatives of the same party regarding its utilization? If so, where are they noted?

KEY-WORDS: human capital theory, educational reform, policy argumentation, technical vocational education.

**THE USE OF THE HUMAN CAPITAL THEORY ARGUMENTATION TO THE
INSTITUTION OF THE GREEK EDUCATIONAL REFORM OF 1997-1998
IN GENERAL AND TECHNICAL-VOCATIONAL EDUCATION**

**L' UTILISATION DE L' MISE EN OEUVRE DE LA THÉORIE DU CAPITAL
HUMAIN À L'ÉTABLISSEMENT DE LA RÉFORME DE L' ÉDUCATION
GRECQUE DE 1997-1998 DANS L' EDUCATION GÉNÉRALE ET
TECHNIQUE PROFESSIONNELLE**

Gerasimos Koustourakis ¹

INTRODUCTION

Research projects dealing with the human capital theory could be classified in two categories. Those approaching it as an economic model, used to formulate specific countries' policy, and those examining its influence on the realization of reforms in education, employment, business, health, immigration and the development of post secondary programs of adult education and training (see:

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ALGIERI², CHUANG and LEE³, GRATTON and GHOSHAL⁴, CRUTCHFILED⁵, FEVRE, REES and GORARD⁶, KANG⁷, MOLINA-MORALES⁸, PRESTON⁹, PSACHAROPOULOS and PATRINOS¹⁰, QUIGGIN¹¹, SECCOMBE and BEEGHLEY¹², STEVENS¹³, SUHRCKE, McKEE, STUCKLER *et. al.*¹⁴). However, the adoption or the rejection of the ideas of human capital theory has not been approached, on an inquiry basis, by the agents, who pursue or object to the realization of an educational reform, especially at the stage of its legislation.

² ALGIERI, Bernadina (2006). Human Capital in Russia. *The European Journal of Comparative Economics*, n. 1, vol. 3, pp. 103-129.

³ CHUANG, Hwei-Lin; LEE, Hsih-Yin (2003). The Return on Women's Human Capital and the Role of Male Attitudes Toward Working Wives. *American Journal of Economics and Sociology*, n. 2, vol. 62, pp. 435-459.

⁴ GRATTON, Lynda; GHOSHAL, Sumantra (2003). Managing personal human capital: new ethos for the 'volunteer' employee. *European Management Journal*, n. 1, vol. 21, pp. 1-10.

⁵ CRUTCHFILED, Elaine (2000). *Developing human capital in American manufacturing: a case study of barriers to training and development*. New York: Garland Publishing.

⁶ FEVRE, Ralph; REES, Gareth; GORARD, Stephen (1999). Some Sociological Alternatives to Human Capital Theory and their Implications for Research on Post-compulsory Education and Training". *Journal of Education and Work*, n. 2, vol. 12, pp. 117-140.

⁷ KANG, Trivina (2004). Taking Human Capital Investment Seriously: Reflections on Educational Reform. *Educational Research for Policy and Practice*, n. 1, vol. 3, pp. 63-76.

⁸ MOLINA-MORALES, Xavier (2001). Human capital in the industrial districts. *Human Systems Management*, n. 4, vol. 20, pp. 319-331.

⁹ PRESTON, Alison (1997). Where Are We Now With Human Capital Theory in Australia. *The Economic Record*, n. 220, vol. 73, pp. 51-78.

¹⁰ PSACHAROPOULOS, George; PATRINOS, Harry (2004). Returns to investment in education: a further update. *Education Economics*, n. 2, vol. 12, n. 2, pp. 111-134.

¹¹ QUIGGIN, John (1999). Human Capital Theory and Education Policy in Australia. *The Australian Economic Review*, n. 2, vol. 32, pp. 130-144.

¹² SECCOMBE, Karen; BEEGHLEY, Leonard (1992). Gender and Medical Insurance: A Test of Human Capital Theory. *Gender & Society*, n. 2, vol. 6, pp. 283-300.

¹³ STEVENS, Margaret (1999). Human Capital Theory and UK Vocational Training Policy. *Oxford Review of Economic Policy*, n.1, vol. 15, n.1, pp. 16-32.

¹⁴ SUHRCKE, Mark; McKEE, Martin; STUCKLER, David; ARCE, Regina; TSOLOVA, Svetla; MORTENSEN, Jorgen (2006). The contribution of health to the economy in the European Union. *Public Health*, n. 11, vol. 120, pp. 994-1001.

In 1997-1998 a new educational reform¹ manifested in Greece, concerning general and Technical-Vocational education. It is the reform by which institutionalization of the rules, related to the function of the contemporary Greek educational system, was attempted. This project seeks the approach and analysis of the reform discourse¹⁵, used by Greek politicians, utilizing human capital argumentation in forming and supporting, in its final stage, the last attempt for educational reform.

The study begins with the theoretical pointings out on the utilization of the human capital theory in education. In the second section appear main aspects of the educational reform of 1997-1998 in Greece. Inquiring questions and Methodology are in the third section. In the last section the results of the analysis of our research material are presented.

1. THEORETICAL POINTINGS OUT

The human capital theory came in the limelight after World War II, because in the 1950s the economists discovered that income growth was faster than “conventional (nonhuman) capital”, as land, machinery, physical reproducible capital and labor hours. They concluded that rising investment in human capital must be the reason (SCHULTZ¹⁶, SALAMON¹⁷). This theory could also explain the rapid

¹⁵ POPKEWITZ, Thomas (1988). Educational Reform: Rhetoric, Ritual and Social Interest. *Educational Theory*, n. 1, vol. 38, pp. 77-93.

¹⁶ SCHULTZ, Theodore W. (1961) Investment in Human Capital. *The American Economic Review*, n. 1, vol. 51, pp.1-17.

¹⁷ SALAMON, Lester (1991). Why human capital? Why now? In: HORNBECK, D. W.; SALAMON, L. M. (Eds.). *Human capital and America's future*. Baltimore: Johns Hopkins University.

and unexpected economic growth of West Germany and Japan, which had suffered important war damage¹⁸. The ideas of the human capital theory prevailed in the 1960s until the middle of the 1970s. They reappeared in the contemporary era of globalization affecting European countries' educational policy.

Human capital theory was formulated by T.W. SCHULTZ¹⁹ in the U.S.A and *was consonant with forms of technological functionalism, which attracted many sociologists in the 1950s.*²⁰ During that period, the state was the protagonist in implementing and elaborating educational reforms, instilling those consensual values thought to be necessary to face social inequalities in a democratic and highly differentiated society (DREEBEN²¹, PARSONS²², FRANGOUDAKI²³). Also, education was regarded as a form of productive investment contributing to improving the quality of the population and promoting equality opportunities in the society, utilizing the citizens' talent and brain. By investing in education increase in knowledge, multiplication of specialized individuals and accumulation of scientific knowledge, aiming at industrial development, are sought. Particularly SCHULTZ argues that: *Much of what we call consumption constitutes investment in human capital.*

¹⁸ SCHULTZ, Theodore W. (1981). *Investment in people: The economics of population quality*. Los Angeles: The University of California Press.

¹⁹ Id., SCHULTZ, 1961, pp.1-17.

²⁰ KARABEL, Jerome; HALSEY, A.H. (1977). Educational Research: A review and interpretation. In: KARABEL, J.; HALSEY, A.H. (Eds). *Power and Ideology in Education*. New York: Oxford University Press. p. 13

²¹ DREEBEN, Robert. *On What Is Learned in School*. Reading, MA: Addison-Wesley, 1968.

²² PARSONS, Talcott (1959). The school class as a social system: Some of its functions in American society. *Harvard Educational Review*, n. 4, vol. 29, pp. 297-318.

²³ FRANGOUDAKI, Anna (1985). *Sociology of Education*. Athens: Papazisis.

*Direct expenditures on education, health, and internal migration to take advantage to better job opportunities are clear examples.*²⁴

The expected results of the policies concerning investment in education, health, and internal migration are linked to the increase in productive ability and acceleration of the economic growth rates.²⁵ Moreover the underdeveloped countries' financial problems were attributed to the underdevelopment of human funds and not to the deficiency of natural wealth creating resources.²⁶

The discourse of human capital theory was adopted since the beginnings of the 1960s by the supranational organizations (INTERNATIONAL MONETARY FUND, UNESCO, OECD) involved in education subjects. They proposed their member states' governments, especially the political authorities of underdeveloped countries, that they should increase expenditures on education, as they are considered to have high individual and social productivity which will become obvious in the future.²⁷

Besides, BECKER²⁸ argued that people invest in themselves to prosper in the labor market. Thus, people consider education as the key institution securing social mobility opportunities for those obtaining educational degrees. Furthermore, through education citizens acquire "social skills", that is, behavior forms which will help them to adapt themselves easily to the job market and afterwards to

²⁴ Id., SCHULTZ, 1961, p.1

²⁵ Id., SCHULTZ, 1961: Id., SCHULTZ, 1981.

²⁶ HARBISON, Frederick (1973). *Human Resources as the Wealth of Nations*. New York: Oxford University Press.

²⁷ Id., FRANGOUDAKI, 1985.

²⁸ BECKER, Gary (1975). *Human Capital: a theoretical and empirical analysis*. Chicago: University of Chicago Press.

maintain and improve their working position²⁹. BECKER³⁰'s theoretical views are utilized when approaching post-compulsory education, training and lifelong learning³¹.

The contestation of human capital theory in the 1970s associates with: a) the appearance of alternative sociological theories, as Marxism, and criticism exerted on the prevailing paradigm of functionalism; and b) the poor results of implementing educational policies formulated on the basis of the directions of this theory internationally, even more after the oil crisis of the 1970s (unemployment growth, difficulty in absorbing all university graduates in occupations) (see: APPLE³², BOWLES and GINTIS³³, CARNOY and LEVIN³⁴, COLLINS³⁵, GOULDNER³⁶).

The human capital theory supports theoretically the educational policies of the contemporary era of globalization, characterized by dominant neo-liberal and conservative educational reforms justified by economic terminology and a tendency to ruin the welfare state (APPLE³⁷, DAUN³⁸, POPKEWITZ³⁹). During this period state

²⁹ CARTLEDGE, Gwendolyn; MILBURN, J.F. (1980). *Teaching social skills to children: Innovative Approaches*. New York: Pergamon.

³⁰ Id., BECKER, 1975.

³¹ Id., FEVRE, 1999. pp. 117-140.

³² APPLE, Michael W. (1982). *Cultural and Economic Reproduction: Essays on Class, Ideology and the State*. London: Routledge & Keegan Paul.

³³ BOWLES, Samuel; GINTIS, Herbert (1975). The problem with Human Capital Theory. – A Marxian Critique. *The American Economic Review*, n. 2, vol. 65, pp. 74-82.

³⁴ CARNOY, Martin; LEVIN, Henry (1976). *The Limits of Educational Reform*. New York: Longman.

³⁵ COLLINS, Randall (1971). Functional and conflict theories of educational stratification. *American Sociological Review*, n. 6, vol. 36, pp. 1002-1019.

³⁶ GOULDNER, Alvin (1970). *The Coming Crisis of Western Sociology*. New York: Basic Books.

³⁷ APPLE, Michael W. (2001). *Educating the "right" way: Markets, standards, God, and inequality*. New York: Routledge.

intervention is reduced and the state (APPLE⁴⁰, BALL⁴¹, HARVEY⁴², WHITTY⁴³, WHITTY, POWER and HAPLIN⁴⁴): a) plays a regulatory role creating laws, institutions and conditions for education to function on the competitive market terms; b) creates presuppositions for involving private sector in education; and c) withdraws gradually from the obligation and responsibility for offering educational services to all citizens. Also, there appears an economic rationality in education, determined by the concepts of privatization, choice, consumption and accountability.⁴⁵ Specifically, parents and students are faced as rational performers and individual consumers of educational services. They can move within a competitive educational market, characterized by publicized evaluation results of the school units, trying to select the school which will help them to increase their “capital” and value (APPLE^{46 47}, WHITTY⁴⁸).

³⁸ DAUN, Holger (2002). Conceptualization and Results of Educational Restructuring. In: DAUN, H. (Ed.). *Educational Restructuring in the Context of Globalization and National Policy*. London: RoutledgeFalmer.

³⁹ POPKEWITZ, Thomas (2000). Reform as the social administration of the child: Globalization of knowledge and power. In: BURBULES, N.C.; TORRES, C. A. (Eds). *Globalization and Education: Critical Perspectives*. New York: Routledge.

⁴⁰ Id., APPLE, 2001.

⁴¹ BALL, Stephen (2003). *The More Things Change: educational research, social class and “interlocking inequalities”*. London: Institute of Education, University of London.

⁴² HARVEY, David (2003). *The New Imperialism*. Oxford: Oxford University Press.

⁴³ WHITTY, Geoff (1997). Creating Quasi-Markets in Education. In: APPLE, M.W. (Ed.). *Review of Research in Education*. Washington, DC: American Educational Research Association.

⁴⁴ WHITTY, Geoff; POWER, Sally; HAPLIN, David (1998). *Devolution and choice in education*. Buckingham: Open University Press.

⁴⁵ Id., APPLE, 2001.

⁴⁶ APPLE, Michael W. (2000). Between neoliberalism and neoconservatism: Education and conservatism in a global context. In: BURBULES, N.C.; TORRES, C. A. (Eds). *Globalization and Education: Critical Perspectives*. New York: Routledge.

⁴⁷ Id., APPLE, 2001.

The European Union (E.U.) has adopted the discourse of the human capital theory and its objectives are associated with attracting private capital in education and promoting privatization. Indeed, *privatization as a policy design is elaborated through organizations, as the World Bank and the Organization for Economic Cooperation and Development. Since the Maastricht Treaty in 1992, the European Union's field of competence has extended beyond vocational training into a more general field of education.*⁴⁹ The degree of materialization of privatization associates with the different way of incorporation and specialization of the European instructions by the member states for the formation of their educational policy. Naturally, this is also greatly influenced by their historically formulated, prevailing educational culture. For example, privatization in England is *a set of accomplished facts.*⁵⁰ However, its promotion to countries with a centrally, bureaucratically designed educational system, as in France and Greece, faces powerful social resistance.

In the official texts of the European Union of the 1990s education appears as a productive investment leading towards the learning society because it provides European citizens with appropriate knowledge and skills.⁵¹ The realization of technological development, the increase in productivity, the financial success and the improvement of the position of the European Union in the frame

⁴⁸ Id., WHITTY, 1997.

⁴⁹ JONES, Ken (2005). Remaking Education in Western Europe. *European Educational Research Journal*, n. 3, vol. 4, p. 230.

⁵⁰ Id., JONES, 2005, p. 234.

⁵¹ COMMISSION OF THE EUROPEAN COMMUNITIES (November 1995). *White Paper on Education and Training - Teaching and Learning - Towards the Learning Society*. COM(95) 590. Available online at url: <http://europa.eu.int/comm/education/doc/official/keydoc/lb-en.pdf>.> [Accessed: 14/03/2011].

of international competitiveness require investments in human capital (COMMISSION⁵², OECD⁵³).

The decisions of the European Leaders, in March 2000 in Lisbon, constitute a turning point in formulating the European educational policy in the 21st century, ultimately aiming at the creation of a knowledge society. Particularly, the economic and political actions of the E.U. pursue the improvement of the human capital, by developing lifelong learning, the acquisition of technological literacy and the utilization of Information Communication Technology in the educational process (COMMISSION⁵⁴, EUROPEAN COMMISSION⁵⁵, THE COUNCIL OF EUROPE, THE COUNCIL OF EUROPEAN UNION⁵⁶, FREDRIKSSON⁵⁷). Moreover, with the European Union's interventions for the development of human capital, it is sought that the European citizens obtain skills useful in the job market and contribute to productivity growth in the knowledge society (EUROPEAN

⁵² COMMISSION OF THE EUROPEAN COMMUNITIES (1993). *Growth, Competitiveness, Employment: The Challenges and Ways Forward into the 21st Century - White Paper*. COM(93)700, December 1993. Luxembourg: European Commission. Y, id., COMMISSION OF THE EUROPEAN COMMUNITIES, November 1995.

⁵³ OECD (1998). *Human Capital Investment: An International comparison*. Available online at url: <<http://www.oecdbookshop.org/oecd/get-it.asp?REF=9698021E.PDF&TYPE=browse>.> [Accessed: 14/03/2011].

⁵⁴ COMMISSION OF THE EUROPEAN COMMUNITIES (24-5-2000). *eLearning – Designing tomorrow's education*, COM(2000) 318 final, Brussels. Y, COMMISSION OF THE EUROPEAN COMMUNITIES (28-3-2001). *The eLearning Action Plan. Designing tomorrow's education*, COM(2001) 172 final, Brussels.

⁵⁵ Id., EUROPEAN COMMISSION, 2006.

⁵⁶ THE COUNCIL OF EUROPE (2003). *Learning and Teaching in the communication society*. Strasbourg: Council of Europe. Y, THE COUNCIL OF EUROPEAN UNION (2003). Council Conclusions of 25 November 2003 on the "Development of human capital for social cohesion and competitiveness in the knowledge society. *Official Journal of the European Union*, 2003/C 295/05, 5.12.2003, C295/9-C295/10.

⁵⁷ FREDRIKSSON, Ulf. (2003). Changes of Education Policies within the European Union in the Light of Globalisation. *European Educational Research Journal*, n. 4, vol. 2, n. 4, pp. 522-546.

COMMISSION⁵⁸, FEVRE, REES and GORARD⁵⁹). In fact, the human capital appears to have the following three components:

*General skills related to basic language and quantitative literacy and, more broadly, to the ability to process information and use it in problem-solving and learning...Specific skills are those related to the operation of particular technologies or production processes...Technical and scientific knowledge refers to the mastery of specific bodies of organized knowledge and analytical techniques that may be of relevance in production or in the advance of technology, such as physics, architecture or the principles of logical circuit design.*⁶⁰

Then, according to BOUCHARD⁶¹ the assumptions of human capital theory are: a) human capital is an investment for the future; b) educational institutions play a central role in the development of human capital; c) more training leads to better work skills and employees need to improve them; and d) training enhances employability and can compensate for skill shortage.

⁵⁸ EUROPEAN COMMISSION (2006). *Employment in Europe 2006*. Luxembourg: Office for Official Publications of the European Communities.

⁵⁹ Id., FEVRE, 1999. pp. 117-140.

⁶⁰ EUROPEAN COMMISSION (2002). *Human capital in a global and knowledge-based economy. Final Report* (by A. de la Fuente & A. Ciccone). Luxembourg: Office for Official Publications of the European Communities. p. 7

⁶¹ BOUCHARD, Paul (1998). Training and Work: Some myths about Human Capital. In: SPENCER, B.; SCOTT, S. (Eds.). *A Canadian Reader in Adult Education*. Toronto, Thompson Publishing Co.

2. THE HISTORICAL CONTEXT AND THE GREEK EDUCATIONAL REFORM OF 1997-1998

After the fall of the dictatorship in 1974 and the restoration of democracy two political parties had governed in Greece. The conservative party of New Democracy (ND) (1974-1981, 1989-1993 and 2004-2009) and the Panhellenic Socialistic Movement (PASOK⁶²) (1981-1989, 1993-2004 and 2009-2011). The ND won the first democratic elections and worked for the entrance of Greece into the European Economic Community. The second party was established in 1974 by Andreas Papandreou adopting the Marxian ideology and arguing in 1970's against the participation of Greece in NATO and European Economic Community. However, when the PASOK had risen to power in 1981 changed its Marxian ideology and worked for the entrance of Greece into the European Currency Union in 1995. More specifically, the collapse of the former-Eastern block in 1990 and the creation of country FYROM under the name "Macedonia" and the confrontation with Turkey in 1996 over the island of Imia in the Aegean Sea, resulted in the orientation of the Greek foreign policy by the socialistic Government of Kostas Simitis. Therefore, *it was now believed that the protection of Greece from external dangers and the strengthening of its international status are related to its European integration and convergence, the crucial points being economy.*⁶³ In

⁶² PASOK (2007). *Our governmental programme. Pleadings, priorities, pledges*. Athens: PASOK (in Greek).

⁶³ BOUZAKIS, Siphis; KOUSTOURAKIS, Gerasimos (2009). Historicity as a legitimizing argument in the case of the Greek educational reforms of 1985 and 1997 – 1998 in general and technical – vocational education. *History of Education*, v. 38, n. 2, p. 283-302.

this case the connection of the Greek education to the country's new socioeconomic needs was presented as a necessity⁶⁴.

The educational crisis can be interpreted by the theory of human capital in a double way (KAZAMIAS⁶⁵, FRANGOUDAKI⁶⁶): a) as inability to cover educational needs of the population of a country. In this case it is attempted to increase study years at school and open up universities to a larger part of the population; and b) the school seems not to qualify the students sufficiently by providing the suitable knowledge for the job market. To encounter this problem, either the development of Technical-Vocational education (TVE), and lifelong learning, or/and the reform of the curriculum and pedagogy may be chosen to facilitate the teaching approach of the new school knowledge.

In 1997-1998 a new educational reform for the general and Technical-Vocational education took place in Greece by the PASOK government aiming at adjusting the country to the new conditions of globalization and the need for educational convergence with Europe (KASSOTAKIS⁶⁷). The specific educational reform includes the Law 2525/97 entitled "Comprehensive Lyceum, Access of its graduates to the Higher Education, Evaluation of educational work" and the Law

⁶⁴ KOUSTOURAKIS, Gerasimos (2007). The new educational policy for the reform of the curriculum and the change of school knowledge in the case of Greek compulsory education. *International Studies in Sociology of Education*, n. 1-2, vol. 17, pp. 131-146.

⁶⁵ KAZAMIAS, Andreas (1982). Educational Reforms 1957-1977: Myths and facts. In: KAZAMIAS, A.; KASSOTAKIS, M. (Eds) *Educational Reforms in Greece (Efforts, Deadens, Perspectives)*. Rethymno: University of Crete.

⁶⁶ Id., FRANGOUDAKI, 1985.

⁶⁷ KASSOTAKIS, Michalis (2000). The challenges of our era and the recent reform in Greek education. In: BOUZAKIS, S. (Ed.). *Historical-comparative perspectives. Festschrift in honour of Andreas Kazamias*. Athens: Gutenberg (in Greek).

2640/98 entitled "Secondary Technical-Vocational Education" (BOUZAKIS⁶⁸, KASSOTAKIS⁶⁹. Law 2525/97 establishes the Comprehensive Lyceum which has an academic orientation (from the second grade the Lyceum is divided into theoretic, scientific and technological fields), also the daylong Preschool and Primary School and the Second Chance Schools, providing intensive courses on Primary or High school level to adults. Also, national examinations are established every two years to hire teachers for compulsory and secondary education. Moreover, the evaluation of educational performance and of the educators is introduced and there is an attempt to open up universities by establishing new Departments and the Hellenic Open University. The Law 2640/98 introduces Technical-Vocational Schools structured in two cycles; the first one lasts for two years whereas the second lasts only one. When finishing cycle one, the students obtain a certificate allowing them to get a job. In addition to this advantage second cycle graduates may also continue studies to Institutes of Professional Training and may enter a Technological Educational Institute after six months of professional experience and after taking examinations.

3. INQUIRING QUESTIONS - METHODOLOGY

The Inquiring questions that will occupy us in this project are:

- Which political forces use human capital argumentation?
- Which are the educational subjects rising from the use of human capital argumentation?

⁶⁸ BOUZAKIS, Siphis (2000). *Modern Greek education (1821–1998)*. Athens: Gutenberg (in Greek).

⁶⁹ Id., KASSOTAKIS, 2000.

- What is the “role” of human capital references? That is, is argumentation used to support and legalize the adopted educational reform or reject it and inform about educational and social consequences of its implementation in education?
- Are there ideological or other differences so much among the different political forces as among representatives of the same party regarding its utilization? If so, where are they noted?

In this project we attempt to answer the particular questions applying qualitative content analysis (NEUENDORF⁷⁰, DEY⁷¹). The analysis unit of our inquiring material is the “subject”. It refers to the part based on the meaning of a word group and is incorporated in a specific category of analysis. The sources² of this research are: a) the Preambles of the educational drafts of the 1997-1998 laws, used by the government to explain the necessity for educational reform; and b) the Parliamentary Proceedings containing different views and ideologies of the political forces during the parliamentary discussion referring to educational drafts of 1997-1998 laws.

The following analysis categories resulted from systematic study of our research sources:

1. European Union, globalization and educational reform.
2. School knowledge, skills and lifelong learning.
3. Education, society and educational expenses.
4. Education and evaluation.
5. Technical-Vocational education and vocational guidance.

⁷⁰ NEUENDORF, Kimberly (2002). *The Content Analysis Guidebook*. Thousand Oaks, CA: Sage.

⁷¹ DEY, Ian (1993). *Qualitative data analysis*. London: Routledge.

In order to come up with valid conclusions, four judges classified the various subjects including human capital argumentation, on the basis of the preceding analysis categories. A subject was accepted only if it had been classified, at least three times, in the same analysis category (acceptable percentage being 0,75)⁷².

4. RESULTS AND DISCUSSION

The political forces represented in the Greek Parliament during the educational reform of 1997-1998 are categorized as follows:

- Centre-left government: Panhellenic Socialistic Movement (PASOK).
- Main opposition party: conservative, neo-liberal party of New Democracy (ND).
- Left wing represented as follows: Democratic Social Movement (DIKKI), renovated left Coalition (Synaspismos) and traditional left of the Communist Party (KKE).

Study of our research material resulted in 219 subjects on human capital argumentation. Table 1 presents distribution of these subjects in analysis categories for each political party that used human capital theory argumentation.

⁷² VAMVOUKAS, Michalis (1998). *Introduction to the Psycho-Educational Research and Education*. Athens: Gregoris. p. 280

TABLE 1:
CATEGORIES OF CONTENT ANALYSIS PER POLITICAL PARTY
(FREQUENCY OF OCCURRENCE)

	PASOK	ND	DIKKI	SYNASPISMOS	KKE
European Union, globalization and educational reform	20	4	7	4	5
School knowledge, skills and lifelong learning	19	7	3	4	8
Education, society and educational expenses	22	13	12	10	12
Education and evaluation	7	5	5	2	3
Technical-Vocational education and vocational guidance	21	10	7	3	6
<i>TOTAL</i>	89	39	34	23	38

Table 1 shows that all above mentioned parties used human capital argumentation in the discussion concerning the educational reform. However, most references are made by the governmental Members of Parliament who promoted the reform (that is, 40,6%). Also, the politicians are more occupied with subjects of these analysis categories: "Education, society and educational expenses", "Technical-Vocational education and vocational guidance", "School knowledge, skills and lifelong learning" and "European Union, globalization and educational reform".

We will proceed to the qualitative analysis of the inquiring material presenting our findings in the various categories.

EUROPEAN UNION, GLOBALIZATION AND EDUCATIONAL REFORM

The specific analysis category includes references with a question on the international influence on the formation of the educational policy and the expected benefits from its implementation, connected with the position of Greece in the E.U. and the contemporary international environment.

The governmental party of PASOK, not only in the Preamble of draft of 2525/97 law, but also through the speeches of the Minister of Education, ARSENIS, and the governmental representatives in the Greek Parliament⁷³, attempted to justify the promotion of the educational reform supporting that: a) It is imposed by internationalization of the economy and necessity for adjusting Greece to the socio-economic and technological advancements occurring in the E.U.; and b) strong competitive educational advantages will be created for Greece, which is expected to attract foreign students from the Eastern Mediterranean and Balkan countries.

Besides, according to the Deputy of PASOK Katsilieris:

the main wealth-producing asset of a society is the human capital, as it is shaped by the education provided.
(Parliamentary Proceedings (PP), 1997).⁷⁴

⁷³ See Note 2: BOUZAKIS, Siphis (2002). *Educational reforms in Greece. Primary and secondary general and technical-vocational education. Reforms attempts of 1959, 1964, 1976/77, 1985, 1997/98*. Athens: Gutenberg, pp. 675-742 (in Greek).

⁷⁴ Id., BOUZAKIS, 2002, p. 683.

The Deputies of the conservative main opposition party (ND) agree that a reform is required for Greece to adjust to globalization conditions.

Synaspismos, the only left party represented in the Greek Parliament, with an obvious European orientation, realized the importance of the international developments leading to a new educational reform. However, the Deputy Kounalakis (PP, 1997)⁷⁵ supported that the government should speculate on the choices to be exercised, as they will be affecting the young's future and the country's development.

The Deputies of the other left parties, which are represented in the Greek Parliament (DIKKI and KKE), rejected the formulation of the Greek educational policy based on the decisions of the E.U. and the instructions of OECD, supporting that, thus, the interests of the European financial and Banking institutions are served. More specifically, the Deputy of DIKKI Tsafoulias protests against the reform, noting:

Let the European Union see it, let the European Court see it, who force us to apprehend the idea of reforms on the basis of the instructions they give us (PP, 1998)⁷⁶.

In addition, the view of the KKE is expressed as follows:

Our own proposition does not fit, Mr. Minister, with your politics. It does not fit with what you and the other political forces call globalization (Tasoulas, PP, 1998).⁷⁷

⁷⁵ Id., BOUZAKIS, 2002, p. 698.

⁷⁶ Id., BOUZAKIS, 2002, p. 754.

⁷⁷ Id., BOUZAKIS, 2002, p. 752.

SCHOOL KNOWLEDGE, SKILLS AND LIFELONG LEARNING

This analysis category refers to the modernization or change of the school knowledge, the abilities and skills that the students should acquire and the development of lifelong learning.

The Deputy of PASOK Katsilieris⁷⁸ argued that “knowledge” constitutes the new wealth of nations and the effort for the learning development of the students should begin at Preschool education. For this reason, it is chosen to have *enhancement of the school curriculum with creative activities, contribution of the school to the conquest of knowledge and maximized development of the individual personality* (Preamble).⁷⁹ Moreover, the Minister of Education, Arsenis⁸⁰, supported that the new reform will provide the students with knowledge and skills allowing them to obtain technological literacy and face the demands of the new post-industrial society.

The basic objective of the new educational reform is the creation of the “retrainable” citizen, who will have to adjust to flexible and frequently changing conditions of the job market. That is why in both Lyceums and Technical Professional Institutions offer is pursued: *at the highest possible level of general culture and education, achieving the cultivation of critical thinking and caring for the provision of the young with general theoretical technological*

⁷⁸ Id., BOUZAKIS, 2002, p. 683.

⁷⁹ Id., BOUZAKIS, 2002, p. 679.

⁸⁰ Id., BOUZAKIS, 2002, p. 713.

*knowledge and professional skills of a broad basis. (Deputy of PASOK Akritidis, PP).*⁸¹

The KKE objected strongly to the attempt for creating the retrainable citizen, who will permanently live in professional insecurity and uncertainty. In fact, the retrainable:

*"will be hired by international firms and other employers and after a year or two they will tell them: you can no longer continue with this knowledge, you must be retrained. And then, lifelong learning will start."*⁸²

Educational innovations for the government are the establishment of lifelong learning and the enactment of practical training. The latter attempts to link the school to the business world:

*Emphasis is given to the acquisition of professional skills in real working conditions. For this reason, it will be sought to sign contracts with businesses of the private/public sector, where appropriate conditions of the local market are secured (Preamble, 1998).*⁸³

The institution of practical training is not accepted by the left parties (KKE, Synaspismos, DIKKI) because through it: a) a low level of qualifications will be offered to the young; b) a working attitude of subjection will be cultivated in them so as *to accept the frame of working relations imposed by the employer* (Deputy of Synaspismos Alfieri, PP, 1998)⁸⁴; and c) it will be beneficial for the businesses which will collect great amounts of money from the implementation of

⁸¹ Id., BOUZAKIS, 2002, p. 740.

⁸² Id., BOUZAKIS, 2002, p. 696.

⁸³ Id., BOUZAKIS, 2002, p. 734.

⁸⁴ Id., BOUZAKIS, 2002, p. 753.

this institution while *they will use the young in auxiliary work of secondary importance* (Deputy of KKE Tasoulas, PP).⁸⁵

The Minister of Education, Arsenis⁸⁶, supported that the development of lifelong learning will assist the continuous updating of the knowledge and skills of the citizens, who will need to change jobs often in their lives, as it happens in Europe, too.

The conservative Deputies of ND are the only ones who agree with the governmental views concerning the meaning of “knowledge” in the modern world and its decision to link the school to the job market for the students to acquire professional skills. Also they propose making: *The introduction of the subject of technology in high school and of the subject of informatics in all schools.*⁸⁷

EDUCATION, SOCIETY AND EDUCATIONAL EXPENSES

The specific analysis category includes human capital argumentation referring to the contribution of education to the confrontation of significant social issues, as inequality. Also, this category includes references regarding educational expenses.

It was argued by the Ministry of Education that with the reform of 1997-1998 important investments are made in education aiming at the socioeconomic support of the Greek family and the diminution of social inequalities. The foundation of this policy is providing free public education. For this reason the money of the Second Community Support Framework is used (Preamble, 1997, Arsenis, PP,

⁸⁵ Id., BOUZAKIS, 2002, p. 750.

⁸⁶ Id., BOUZAKIS, 2002, p. 719.

⁸⁷ Id., BOUZAKIS, 2002, p. 689.

1998).⁸⁸ The new reform measures are supposed to face the following problems: a) through daylong school working parents will be assisted, who can not afford to pay for their children's caring; b) with the implementation of reinforcing teaching in the Comprehensive Lyceums the poor students will be helped, who can not afford to take private lessons; c) with the Second Chance schools the citizens over 18 will be favored, who come from low socioeconomic classes and minorities; and d) with the increase in the number of imported students in the universities and the Technological Educational Institutes and with the parallel operation of the Hellenic Open University, there is an attempt to stop the students' migration which leads to financial bleeding of the national currency. The opening of opportunities for access to Higher Education *will have beneficial influences on the qualitative upgrading of our economy and society.*⁸⁹

The Deputy of ND Konstantopoulou characterized the new educational policy as a movement trying to be popular to the public, supporting that: *The Community Funds, which will vanish in 18 or the most in 30 months, can not constitute panacea when we plan changes such as the increase in the student population, which will permanently increase the expenses of the universities.*⁹⁰

The Deputies of ND Karamarios and of Synaspismos Kounalakis talked about dangerous economic choices in implementing the reform, which is by 75% based on temporary community funds. Also, there is coincidence of views among conservative and left-wing Deputies of the opposition about the low financing of Education by

⁸⁸ Id., BOUZAKIS, 2002. pp. 675, 764.

⁸⁹ Id., BOUZAKIS, 2002, p. 686.

⁹⁰ Id., BOUZAKIS, 2002, p. 744.

the government budget. However, the solution they suggest in order to find the necessary funds for education is different. Particularly, New Democracy, using neo-liberal argumentation asks for a change of attitude of the Greeks, who have to accept that to improve the quality of education there should be an inflow of private funds and privatization should be promoted. This is so, because: *We live in a regime of shrinkage of expenses of the public sector because of the Maastricht Treaty and this creates great inability in finding sufficient public funds to support Education* (Konstantopoulou, PP, 1998).⁹¹ Moreover, privatization must certainly be applied to Higher Education with the amendment of article 16 of the Greek Constitution, to allow the foundation and function of private universities.⁹²

The Deputies of the left parties are in favor of free education and claim that the necessary funds can be found if the governmental complimentary regulations to the powerful economic factors, which owe to the state, stop, if military expenses decrease and if bank and business profits are taxed. In fact, according to the Deputy of DIKKI Tsafoulias (PP, 1997)⁹³, as things are, although the establishment of the daylong school constitutes a positive choice, its operational cost will finally be covered by the citizens themselves.

EDUCATION AND EVALUATION

In this category belong references which show forth the role and expectations from implementing evaluation in education.

⁹¹ Id., BOUZAKIS, 2002, p. 744.

⁹² Id., BOUZAKIS, 2002, p. 744.

⁹³ Id., BOUZAKIS, 2002, p. 707.

With the reform of 1997-1998, PASOK re-establishes the evaluation of students, educators and educational performance, which it, itself, had abolished at the beginnings of the 1980s. Especially in Comprehensive Lyceums, students' evaluation will be continuous and have a determining character, according to Minister Arsenis⁹⁴. This will lead to the upgrading of the Lyceum and the change in the way of access to universities, taking the graduation degree into account.

The Deputy of ND Karamarios expressed his joy for the re-establishment of evaluation concerning educators and educational performance. However, he disagreed with the students' evaluation at the Comprehensive Lyceum because: *the student will be found under a process of continuous evaluation and therefore the school is changed into a constant examination centre and not a hive of knowledge.*⁹⁵

The left parties disagree with the views of both PASOK and New Democracy about evaluation, because they believe that it will be implemented in a punishing rather than correcting way for the school and the educator.

TECHNICAL-VOCATIONAL EDUCATION AND VOCATIONAL GUIDANCE

This analysis category includes references related to the regulation of issues on vocational guidance and TVE.

⁹⁴ Id., BOUZAKIS, 2002, p. 716.

⁹⁵ Id., BOUZAKIS, 2002, p. 691.

On the side of the governmental party it is supported that with the reform of the TVE is pursued: a) the preparation of the students for their future occupation⁹⁶; and b) the discongestion in the general education and the reduction in the pressure for the increase of positions in Higher Education.⁹⁷ However, during the discussion in the Parliament , the social depreciation of the TVE in Greece is mentioned, as it attracted students from low socioeconomic levels and did not have the support of the business world. That is why its graduates can not find a job. This problem is attempted to be solved by the new educational reform. In fact, vocational guidance is established in order the young over 15 to be guided to choose the educational way that suits them (Comprehensive Lyceum and then University or TVE).⁹⁸ Also, to make the Technical Vocational schools more attractive, the second cycle graduates are given the possibility to enter a Technological Educational Institute, if they acquire some professional experience.

The Deputy of ND Konstantopoulou criticized the reform of the TVE claiming that it does not face the problem of the quality of the specific schools. To attract remarkable students with a “high intelligence quotient” she proposed holding an advertising campaign of the TVE:

There are professionals who can help in this effort by promoting the positive elements of the technological-vocational career, its offer to the development of the country, the possibility of social and economic

⁹⁶ Id., BOUZAKIS, 2002, p. 687.

⁹⁷ Id., BOUZAKIS, 2002, p. 676.

⁹⁸ Id., BOUZAKIS, 2002, p. 738.

ascent of those who follow it, by finding the suitable examples in everyday reality (PP, 1998).⁹⁹

Finally, there is a coincidence of views among the Deputies of the left parties about the TVE, who support that: a) the Technical-Vocational Schools operate on class criteria, because they attract the poorer children of the working class and those who are rejected by the Lyceum; b) they do not cover their graduates professionally; and c) in fact, the graduates of these schools are excluded from Higher Education, because it is hard to secure the professional experience required for them to participate in the entrance examinations for the Technological Educational Institutes.

CONCLUDING REMARKS

From the analysis of our research material, the following conclusions can be drawn:

- Human capital argumentation is used by the politicians of all parties that are represented in the Greek Parliament. However, most references are made on the side of the governmental party, which tries to establish the new educational reform.
- Human capital argumentation brings forward the subjects: a) of the importance of investments in education, which is thought to benefit the society, by contributing to the economic growth and the decrease in social inequalities; b) the political decisions and the guidelines of the E.U played an important role in the formation of the new educational reform, the

⁹⁹ Id., BOUZAKIS, 2002, p. 745.

implementation of which is based on the funds of the Community Support Framework; c) with the new reform, the creation of the retrainable person is attempted, who will obtain general skills” and will utilize the institution of lifelong learning so as to be able to adjust to the requirements of a changing working environment; d) the necessity for the reform of the TVE is associated with the objective of producing individuals who will obtain professional skills to cover the needs of the job market; and e) with the implementation of evaluation, it is expected to achieve an improvement of the competitiveness of the Greek educational system.

- Human capital argumentation has a legitimizing character. The governmental Deputies use it to prove the reform theoretically and make its necessity clear, focusing on the expected for Greece social and economic benefits from its implementation. Also, the conservative politicians of ND, using human capital argumentation, promote their neo-liberal educational reason. The argumentation that exists in the references of the left Deputies is used for the rejection of the governmental educational choices (e.g. not accepting the intervention and influence of international politics and economic cycles in the formation of the Greek educational policy, rejection of the attempt to create the retrainable citizen).
- There are no differentiations concerning human capital argumentation from the Members of Parliament that belong to the same political area. Moreover, we can talk about coincidence of views between the Deputies of the governmental party, PASOK, and the main opposition party of New

Democracy on basic choices of the reform that are of a strategic character (evaluation, association of the school with the job market, lifelong learning, educational expenses). There is an exception in the subject of privatization, which for the conservative Deputies of ND, constitutes the only solution to the improvement of the quality of the Greek educational system. Finally, their disagreement with the views of PASOK and ND, that is, the parties that have governed Greece from 1974 until today, expressed the Deputies of the left wing (KKE, Synaspismos, DIKKI).

On the basis of the findings of this research we can support that the continuation of the implementation of the reform of 1997-1998, that is, about ten years after its establishment, and despite the rise of the conservative party of ND in power, in 2004, is owed to the gradual ideological convergence between PASOK and ND, concerning the utilization of the aspects of the human capital theory for the formation of the educational policy. In fact, these two parties in their contemporary political programmes about Education (NEW DEMOCRACY¹⁰⁰, PASOK¹⁰¹) reproduce the official views of the E.U. about the human capital theory (investment in knowledge, human capital as a general basic skill and as a specific skill in technology, development of lifelong education and training, contribution of the education to the economic competitiveness and social cohesion)

¹⁰⁰ NEW DEMOCRACY (2003). *Our governmental programme for education. Quality, assessment, resources*. Athens: New Democracy (in Greek).

¹⁰¹ Id., PASOK, 2007.

(EUROPEAN COMMISSION¹⁰², THE COUNCIL OF THE EUROPEAN UNION¹⁰³, THE COUNCIL OF EUROPE¹⁰⁴). From the study of the educational programme of PASOK results the removal towards the acceptance of the neo-liberal policies, which ND has adopted and which are associated with the objectives of the implementation of accountability and privatization in education (Apple¹⁰⁵, Whitty¹⁰⁶, Whitty, Power and Haplin¹⁰⁷). The first objective in the case of ND is expressed as "assessment" and in the case of PASOK as "assessment and social accountability" (NEW DEMOCRACY¹⁰⁸, PASOK¹⁰⁹). The second objective is sought to be promoted in the future, by both parties, with the operation of private universities, given that the article 16 of the Greek Constitution, which forbids it, will be amended. However, privatization is applied to a great degree in Greece, in the case of post-secondary, post-compulsory education, which addresses students who were not able to enter Higher Education and did not migrate to foreign universities. This refers to the Institutes of Professional Training, which are many more than the Public ones. In these, the people invest in themselves aiming at acquiring the professional skills required by the job market. Also, privatization is implemented at the Centers of Independent Studies, many of which

¹⁰² EUROPEAN COMMISSION (2002). *Human capital in a global and knowledge-based economy. Final Report* (by A. de la Fuente & A. Ciccone). Luxembourg: Office for Official Publications of the European Communities.

¹⁰³ Id., THE COUNCIL OF EUROPEAN UNION, 2003.

¹⁰⁴ Id., THE COUNCIL OF EUROPE, 2003.

¹⁰⁵ Id., APPLE, 2001.

¹⁰⁶ Id., WHITTY, 1997.

¹⁰⁷ Id., WHITTY, 1998.

¹⁰⁸ Id., NEW DEMOCRACY, 2003.

¹⁰⁹ Id., PASOK, 2007.

cooperate with colleges or universities abroad, and in which the human capital is developed as technical and scientific knowledge. However, the certificates that these institutions award are not yet recognized by the Greek State.

The adoption of the human capital theory by the European Union and the realization of specific policies and economic actions for the achievement of the objective of Lisbon 2000, that is, *the Union to become, on a universal level, the most competitive and powerful economy of knowledge*¹¹⁰ opens up a wide field of sociological research. More specifically, the approach of the way of materialization of the objective of investing in knowledge and in the human being, in the case of the educational reforms and of the formation of the educational policies of the European countries to the levels of Preschool, Primary School, Secondary School, TVE, Higher Education and lifelong learning and training, would be of interest, as well as the specialization of this policy in the sectors of the curriculum, the school knowledge and the pedagogical practices.

¹¹⁰ Id., COMMISSION OF THE EUROPEAN COMMUNITIES, 24-5-2000. p. 3

NOTES:

1. According to Popkewitz¹¹¹ an educational reform is a political practice that embodies effort to administer change. It can be seen as systems of reason that influence problem solving activities of education.

2. The sources of our research have been published and are included in the volume Bouzakis.¹¹² In the case where, during the qualitative analysis an extract has been quoted from the speech of a politician, then, besides his name, the reform period of his speech (1997 or 1998) will be mentioned, as well as, the page number, where this extract is found in the above mentioned volume.

¹¹¹ Id., POPKEWITZ, 2000. pp. 158-159

¹¹² Id., BOUZAKIS, 2002.

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