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Responses to COVID-19 Social and Economic Impacts: A Comparative Analysis in Southern European Countries

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Abstract: The COVID-19 pandemic globally affected European societies. This new crisis arrived after a period of gradual recovery from the 2008 financial crisis that had jeopardized the achievement of Europe Strategy 2020 (ES2020) targets. The need to recover for the Southern European countries, which had austerity programs during the financial crisis, is crucial to ensure a continuum of economic and social development. This study aims to analyze the impact of the two last international crises on the accomplishment of ES2020 goals and how the 'NextGenerationEU' program presents a mechanism to recover from the pandemic's socioeconomic impacts. We analyzed secondary statistical data from Eurostat and official European documents. Additionally, we carried out a systematic analysis of 162 measures of the recovery and resilience plan from Southern European countries (Greece, Spain, Italy, and Portugal). The results showed that ES2020 targets were at risk, particularly in the field of employment, combating poverty, and social exclusion. Currently, there is strong European investment in response to the socioeconomic impacts of the pandemic, with all countries defining measures adjusted to protect the most vulnerable groups. However, the implications of these responses require a political commitment for them to effectively contribute to sustainable recovery and development.

Keywords: COVID-19; crisis; European Union; NextGenerationEU; pandemic; social and economic impacts; Southern Europe



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1. Introduction

The COVID-19 pandemic aggravated existing social problems, resulting in new social risks ([Organisation for Economic Co-operation and Development 2020](#); [United Nations 2020a](#)) that have had and will have strong effects on the needs of citizens, particularly the most vulnerable groups ([Taylor-Gooby 2004](#)). A new context of health, economic, and social crises with global effects have thus emerged, threatening the balance of social well-being in societies ([Grasso et al. 2021](#)).

Global crises show the need for reforms within the social and welfare models in Europe, and although we can see in the EU that welfare systems are better structured (than others) for a fair redistribution and the guarantee of social rights ([Bieler 2015](#)), they have still succumbed to the situation caused by the COVID-19 pandemic. However, it should be noted that, in addition to social risks and vulnerabilities ([Beck 1992](#); [Giddens 2013](#)), globalization allowed for strong technological advancement and increased skills that required a political effort to leverage investment for social benefits, which contributed to an improvement in economic stability and social protection ([Sapir 2006](#)).

The current pandemic crisis will have more devastating effects than the economic and financial crisis of 2008 ([Grasso et al. 2021](#)). The measures to prevent the spread of COVID-19 had a significant impact on economic activities, and policymakers could have used different ways to determine which measures to support their citizens ([Martín and Román 2021a](#)).

Before the pandemic situation caused by COVID-19, Europe was in a recovery phase from the previous international crisis (Casquilho-Martins 2018). The European political governance model, resulting from the 2008 financial and economic crisis, sought to combat the huge increase in unemployment and economic stagnation (Kroll 2011). However, the strong economic and financial instability marked a long period of recession in financial markets through the adoption of austerity measures in different member states, especially in Southern European countries.

Given the context of the 2008 financial crisis that marked the last decade, it becomes relevant to analyze how the Southern European countries that were most affected are reacting to the effects of the current pandemic crisis caused by COVID-19 (Ladi and Tsarouhas 2020). According to Ferrera et al. (2000) and Sapir (2006), countries such as Portugal, Spain, Greece, and Italy have a social protection model, which, despite their differences, reveal similar characteristics, with aspects that differ from the continental (or corporative) model, opposing Esping-Andersen's reading of the existence of only three Welfare State regimes.

The Southern European (or Mediterranean) countries started their social protection systems later and have a mixed type of coverage (Bismarkian and Beveridgean) in which pensions represent most of the social expenditure. They are characterized by high youth unemployment, low female employment and gender inequality, and an imbalance in social protection that is very generous for some groups but limited for others (Ferrera et al. 2000; Sapir 2006; Silva 2002).

Based on this scenario, we sought to fulfill two objectives. Firstly, to analyze the impact of the financial crisis in Southern European countries (Greece, Spain, Italy, and Portugal) against the objectives of the Europe 2020 Strategy, namely, in the promotion of employment and the fight against poverty; secondly, to start from the new reality marked by the pandemic crisis in 2020, analyzing the measures implemented in European plans through the 'NextGenerationEU' program.

Thus, it is now relevant to study the pandemic crisis and the current political strategies, considering the marks left by the previous crisis of 2008. This study seeks to understand if the Member States are more prepared to respond efficiently to the challenges to social protection in the present and for the future, contributing to the minimization of impacts as soon as there is political will.

The next section focuses on the European context, highlighting some developments since the last international crisis up to the current pandemic crisis. In the Materials and Methods section, we explain the techniques and provide information about the sources and data procedures. We continue by sharing our findings in the Results section, followed by a discussion focused on the consequences and responses to Southern European countries. Finally, we present the conclusions of our study, linked to COVID-19 implications and the commitment to a Social Europe.

2. Background

The emergence of the European integration project envisioned a single market supported by a perspective of equal economic opportunities, social justice, and cooperation between member states, creating political power interdependencies between European and national socioeconomic dynamics (Crum 2015). Since the European Union Treaty, the commitment to a Social Europe has been aimed at social protection standards in counterbalance to a liberal economy. One goal of the European Social Model was to combine social policies in the European Union, implemented by the member states, as a way to stabilize a single market and in various other dimensions such as health, equal opportunities, labor mobility, and social dialogue (Haar and Copeland 2010). For Dannreuther (2014), this model presented itself as a typology of an ideal model, which would translate a social commitment over markets to create economic and social cohesion while maintaining cross-cutting values. In 2000, the Treaty of Lisbon defined a plan to renew the European

project in a more dynamic and competitive area for sustainability and economic and social development (Marques 2011).

In 2010, the European Commission introduced the Europe 2020 strategy to face the social and economic challenges caused by the financial crisis. This new strategy set five headline targets for Europe and its Member States to achieve by 2020. It emphasized the importance of ensuring quality of life for future generations and secure social models, reinforcing three priorities: smart growth, sustainable growth, and inclusive growth (European Commission 2010). According to Marques (2011), there was a need for the European Union to modernize the European Social Model in the face of global transformations and their effects. However, the prevailing ideologies within Europe seem to place social policies as a second option and even classify them as opposed to economic development and sustainability (Menz 2015). Economic growth models alone are not sufficient for sustainable and qualitative growth; social welfare dimensions are fundamental to social and human development (Sabato et al. 2014). These dimensions include social protection, especially in promoting employment, combating poverty and social exclusion, and reducing inequalities. From the point of view of social investment, social policies make it possible to achieve economic and social objectives (Colby 2013), which, in a reconciled way, contribute to the improvement of societies and the adaptation to their transformations and social risks (Giddens 2013; Taylor-Gooby 2004). The social integration and the balance of markets of the European Social Model, supported on the social democratic principles of northern Europe, sought mechanisms of regulation and redistribution for the improvement of living conditions of citizens of Europe while limiting the negative effects of the market (Crespy and Menz 2015).

The European social dimension is directly linked to the welfare models of the various states, which, in periods of crisis in the European Union, have presented worrying data on the impacts caused by political strategies (Bieler 2015). It has become evident that the austerity policy options of the last crisis were marked by cuts in social spending and increased inequalities, consequences that were justified as necessary, putting in question the principles of equity and social integration of a European welfare model, and that gave rise to new risks (Casquilho-Martins 2018; Ranci et al. 2014). In 2014, the European Commission acknowledged that the financial crisis had a clear impact, particularly on employment and levels of poverty (European Commission 2014).

This phase saw the beginning of external support to the member states considered to be in the greatest difficulties and with the greatest economic and financial imbalance, such as Greece, Spain, Ireland, Italy, and Portugal (Borghi 2013; Kouretas and Vlamis 2010; Dessì and Greco 2012; Caritas Europa 2013; Sapir et al. 2014; Whelan 2014). The European Financial Stability Facility (EFSF) and the European Financial Stabilisation Mechanism (EFSM) implemented measures that were intended to reverse debt insecurity (de Grauwe 2011). Although these mechanisms were temporary in nature, eventually replaced by the European Stability Mechanism (ESM) (European Council, 17 December 2010), this initiative reflected the concerns of financial and economic agents, especially investors, who feared that some countries would default on their financial obligations. In October 2012, the ESM was formalized following the decisions of the Heads of State or Government of the Member States on 21 July 2011 to increase the effectiveness of financial assistance mechanisms by establishing adjustment programs of the Treaty of the European Stability Mechanism. According to Sabato et al. (2014), member states developed social and economic recovery strategies that should have included policy options that safeguarded the balance of the social integration model. The focus on prevention was considered an asset rather than correcting risks or possible market failures, which would strengthen the quality of social and economic growth itself (Morel et al. 2012).

From the point of view of social investment, it would allow economic and social objectives to be achieved, which would contribute to the improvement of societies, adapting to their transformations and to new social risks (Taylor-Gooby 2004). Consequently, public and social policies would be an important support for growth and capital improvement,

contrary to some perspectives that point them out as a form of expenditure and burden on public finances (Costa and Caldas 2013; Barata and Carmo 2014). However, financial and economic efforts have increased these countries' obligations to banks, structurally undermining the balance of public accounts (Blyth 2013; A. C. Ferreira 2014).

Regarding the current context, rating agencies that have focused on the economic and financial growth of the northern countries model have predicted negative scenarios in the risk assessment of sovereign debts in 2021, which are due to the budgetary effort required to finance recovery programs in countries such as Greece, Italy, Portugal, and Spain (Abreu 2020; Jimeno and Ruiz 2021). At the beginning of the pandemic, national governments responded differently to address the consequences of this crisis (Martín and Román 2021b), though there was a concern in southern European countries to maintain the well-being of citizens and protect society and the economy (Pereirinha and Pereira 2021). For Santos (2020), the State has taken on a central role worldwide in the fight against the pandemic, which has brought with it political and legal difficulties as well as financial, social, and economic issues. Grasso et al. (2021) considered that the consequences of COVID-19 in European societies are limited basic social and political rights, exponentiating social inequalities and weakening the well-being of citizens, including women, migrants, the elderly, caregivers, and the homeless people (Organisation for Economic Co-operation and Development 2020; United Nations 2020a; Eurofound 2021; Pereirinha and Pereira 2021).

The impacts of COVID-19 have thus been associated with the concept of pandemic resilience (Hynes et al. 2020; Pereirinha and Pereira 2021), which has become a central approach to deal with pandemic social and economic effects in a period of designing and implementing rapid response adaptations by governments (Organisation for Economic Co-operation and Development 2021; World Bank Group 2020a).

The Organisation for Economic Organisation for Economic Co-operation and Development (2021) presented an overview of the implications of this crisis for multi-level governance and for building more resilient regions. At the local level, we can highlight some of these implications in southern European countries. In Portugal and in Spain, the governments implemented measures to support local funding in Autonomous Communities or Municipalities, as well as emergency funds to support the decline in economic activity and vulnerable sectors of the population, especially during lockdowns (Organisation for Economic Co-operation and Development 2021). Additionally, the use of e-government tools was a way to reduce social and economic impacts. In Italy, they developed different digital solutions for pandemic control as well as online educational resources for families with young children and digital tools and tutorials for workers working remotely at home. Another example was the Greek project #CitySolidarityGR to help vulnerable citizens access supplies and services, including medication and necessary household items, through the municipalities, the private sector, and organizations in order to support the citizens most affected by the COVID-19 pandemic, seeking to reduce the pandemic's socioeconomic implications (Organisation for Economic Co-operation and Development 2021).

To support member states hit by the COVID-19 pandemic, the European Council suspended tax rules. One of the changes occurred under the agreement amending the European Stability Mechanism (ESM) in early 2021, simplifying the access regime for member states in a crisis context (European Stability Mechanism 2021). These changes came after member states refused loans of EUR 240 billion in May 2020, and this fund had serious implications for Southern European countries during the financial and economic crisis (Janse and Ruhl 2020). Thus, to minimize and overcome the impacts of the pandemic in European Union countries, a Recovery and Resilience Mechanism was designed through the 'NextGenerationEU' (NGEU) program (Ladi and Tsarouhas 2020). This is a temporary instrument to finance Europe's recovery, which is the main mechanism to foster a greener, more digital, and resilient economy after the COVID-19 pandemic through grants and loans totaling EUR 750 billion (Wolff and Ladi 2020).

Picek (2020) stressed that a coordinated fiscal policy response is crucial to stimulate the economy of all EU member states. Some obstacles may arise in the European compromise

between members due to different political expectations (De la Porte and Jensen 2021), and it is still unknown if this mechanism will be sufficient to respond to the current crisis (Alcidi and Gros 2020). Although the NGEU recovery instrument is a financial instrument, we must keep in mind that its aim is to repair the economic and social damage consequent to the pandemic of COVID-19, 'to make Europe greener, more digital, more resilient, and better fit for the current and forthcoming challenges' (Pfeiffer et al. 2021, p. 11). Additionally, the European Union fiscal and policy response to COVID-19 could change growth models in peripheral European economies, which still struggle with high levels of public debt (De la Porte and Jensen 2021). These considerations lead to the questioning of the current political options in the countries of Southern Europe in response to the pandemic, promoted by the member states and the European Union and what solutions are being sought in the face of this unprecedented crisis.

3. Materials and Methods

In this study, we opted for mixed methods, considering their complementarity and aiming at the triangulation of the information collected in the systematization and presentation of the results. Bullock et al. (1992) highlight the potential of mixed methods in the field of the complexity of social policies, in which the simultaneous use of quantitative and qualitative methods is a privileged form of research. Another reason for this methodological approach was the possibility of obtaining data at various structural levels in a period delimited by the researcher (Bryman 1992). We considered that multiple approaches should be incorporated at all stages of a study, transforming its results and analysis into another approach (Flick 2009).

The choice of sample and number of cases under study was selected according to criteria of an intentional theoretical sample (Flick 2005), supported by a choice of cases that are expected, according to their level, to generate new ideas based on previously established criteria. In this sense, we selected four countries corresponding to the welfare model characteristic of Southern European countries, namely, Greece, Italy, Portugal, and Spain.

3.1. Statistical Data

The analysis of data collected through official databases and statistical reports allows a comparison of socioeconomic and social protection indicators through secondary data (Blaikie 2003). The main source of statistical information was taken from the statistical office of the European Union—the Eurostat portal (Eurostat 2021a, 2021c, 2021b)—collecting data from the four countries under analysis. Bryman (2012) highlights advantages in using secondary data collected by official sources, such as government organizations, allowing access to valid information collected from a variety of sources.

Secondary statistical data provided by Eurostat was also used to carry out a comparative analysis related to two indicators: the employment rate and people at risk of poverty or social exclusion. Both indicators were analyzed for the four Southern European countries between 2010 and 2020, considering the targets defined in the Europe 2020 Strategy for each of the countries.

3.2. Document Analysis

For document analysis, a collection of technical documents and legal norms on policy measures to combat the impacts of the pandemic was made, including information related to the recent ones, namely, through the official websites of:

- European Commission (2010, 2019, 2021a, 2021b, 2021c, 2021d).
- European Union (2011, 2021a, 2021b, 2021c, 2021d).

The purpose of document analysis was the condensed representation of information for data consultation and storage (Bardin 2009), being relevant as a complement to other data collection and processing techniques. We developed this technique for the selection of sources and analysis of relevant information within the scope of the study, elaborating a

matrix that allowed us to collect, organize, and systematize the document information in this context.

Recognizing different priorities and a need to deepen the social protection measures adopted by these countries in their recovery and resilience plans, we chose to analyze and systematize 162 social protection measures. For the analysis of the recovery and resilience plans, we built a table with the following categories: sequential code, country, reform/investment, related measure (component), measure code, milestone/target, name, qualitative indicators, quantitative indicators, indicative timeline for completion, and description of each milestone and target. These tables followed an adaptation of the model shared by the European Commission with the member states. Subsequently, data processing techniques were applied, for which a systematic analysis was carried out of the various documents collected on the policy guidelines and strategies of the four countries under analysis. Finally, we summarize the set of measures for each country, presenting an exploratory description of these countries' policy responses to the socioeconomic impacts of the pandemic.

4. Results

In this section, we introduce the findings, organized into two sub-sections: impacts of combating socioeconomic effects and the European response to the COVID-19 pandemic crisis. In both dimensions of analysis, we have systematized the data, referring to the four countries in a comparative manner.

4.1. Impacts of Combating the Socioeconomic Effects of the Crisis

The Europe 2020 Strategy emerged from the development of the impacts of the 2008 financial crisis on the global economy, referring to a plan to strengthen Europe for a sustainable, intelligent, and inclusive future through 5 major objectives (European Commission 2010). The analysis focused on the priority of inclusive growth, seeking to understand the evolution of two axes: (1) promoting employment and (2) fighting poverty and social exclusion. Each member state of the European Union defined a set of national rate targets that it intended to reach by the year 2020. It was deemed relevant to analyze these indicators, cross-referencing them with data that would allow us to understand the responses of the member states to the impacts of the pandemic.

4.1.1. Employment Promotion

The Europe 2020 Strategy's employment promotion goal sought to achieve a 75% employment rate in the population aged 20–64. Each country had specific goals defined, whose achievement values varied between 2010 and 2020. Based on data from Eurostat (2021a), none of the countries analyzed reached their targets: Greece (−8.9%), Spain (−8.3%), Italy (−4.4%), and Portugal (−0.3%) (Table 1).

Looking at the data prior to 2020, there was a trend towards a gradual improvement in the employment rate in the 20–64 age group, but this was far from the proposed targets, except for Portugal, which reached its target in 2018 and 2019. In the years between 2010 and 2013, there was a regression in Greece (−10.9%), Spain (−4.2%), and Portugal (−4.9%). Italy, on the other hand, maintained the values from 2010 to 2011, and there was a decline in the employment rate between 2011 and 2013 (−1.3%). We found that in the years when the economic and financial crisis and austerity measures were in force, each country's figures moved away from their targets.

Starting from the year 2014, annual increases between 2013 and 2019 were recorded in all countries: Greece (+8.3%), Spain (+9.4%), Italy (+3.8%), and Portugal (+10.7%). In the years 2018 and 2019, Portugal managed to exceed the set target, but the remaining countries still stay away from their goals. In addition, Eurostat data show that in 2018, Spain, Italy, and Portugal were above the EU average in employment precariousness, affecting women in particular (European Commission 2019).

Table 1. Employment rate, age group 20–64, 2010–2020 (%).

	Greece (GR)		Spain (ES)		Italy (IT)		Portugal (PT)	
2010	63.8		62.8		61		70.3	
2011	59.6	↓	62	↓	61	↓	68.8	↓
2012	55	↓	59.6	↓	60.9	↓	66.3	↓
2013	52.9	↓	58.6	↓	59.7	↓	65.4	↓
2014	53.3	↓	59.9	↓	59.9	↓	67.6	↓
2015	54.9	↓	62	↓	60.5	↓	69.1	↓
2016	56.2	↓	63.9	↓	61.6	↓	70.6	↓
2017	57.8	↓	65.5	↓	62.3	↓	73.4	↓
2018	59.5	↓	67	↓	63	↓	75.4	↑
2019	61.2	↓	68	↓	63.5	↓	76.1	↑
2020	61.1	↓	65.7	↓	62.6	↓	74.7	↓
	Target	70	Target	74	Target	67	Target	75

Source: (Eurostat 2021a) (data extracted on 3 July 2021).

With the emergence of the pandemic, there is a further decrease in the employment rate. From 2019 to 2020, Greece (−1%), Spain (−2.3%), Italy (−0.9%), and Portugal (−1.4%) ended a decade of investment without achieving their targets promoted by the Agenda for new skills and jobs (European Union 2011). In this Agenda, Member States were invited to use European funds for structural reforms and key actions, introducing measures in line with Europe 2020 objectives and targets, notably on flexicurity, skills upgrading and matching, quality of work and working conditions, and job creation. The Europe 2020 Strategy evaluation highlighted that in Greece, Spain, and Italy, greater efforts are still needed to improve their employment rate (European Commission 2019).

Although the employment rate has decreased, we can see that there has been an effort by the member states under analysis in the measures adopted to compensate for the increase in unemployment. According to the Country policy responses documents of the International Labour Organization (n.d.) for Greece, Italy, Spain, and Portugal, published between June 2020 and February 2021, we find some consistency in social protection through the main measures implemented. It is noteworthy that support mechanisms were created for the private sector, allowing the exemption of contributions or the temporary suspension of activity, with the condition that no worker was dismissed. As for unemployed workers, unemployment subsidies were granted, and special subsidies were created. Unemployment benefits were also extended, and this support was extended to situations that were previously not covered by the State. In addition to measures to combat unemployment, new hiring in the health sector was also reinforced, minimizing the effects of the pandemic on employment rates (International Labour Organization n.d.).

Companies and services were encouraged or required to adopt teleworking arrangements in activities where this was possible. According to data from Eurostat (2021b), the percentage of employed persons working from home increased in all European Union countries, except Norway. As for the Southern European countries, between 2019 and 2020, the percentage of teleworkers rose more than threefold in Greece (1.9% to 7%) and Italy (3.6% to 12.3%) and more than twice as much in Portugal (6.6% to 14%) and Spain (4.8% to 11%).

4.1.2. Fighting Poverty and Social Exclusion

With regard to poverty reduction, the Europe 2020 Strategy aimed to reduce the number of people living below the poverty line by 25% and to reduce the number of people living in poverty in Europe by 20 million. Each country defined its own target to contribute to the achievement of this overall European Union goal. However, the indicator used to verify the evolution of these values is the risk of poverty and social exclusion, which combines three indicators: at risk of poverty or severely materially deprived or living in households with very low work intensity (Eurostat 2021c).

The available data show that by 2019, of the four countries under analysis, only Portugal exceeded its goal compared to the 2008 values (Table 2).

Table 2. People at risk of poverty or social exclusion, 2010–2020, cumulative difference from 2008 (thousands).

	Greece (GR)		Spain (ES)		Italy (IT)		Portugal (PT)	
2010	−15	↓	1243	↓	−190	↓	−65	↓
2011	357	↓	1577	↓	1776	↓	−157	↓
2012	749	↓	1841	↓	2894	↓	−90	↓
2013	857	↓	1844	↓	2147	↓	121	↓
2014	838	↓	2616	↓	2064	↓	106	↓
2015	782	↓	2389	↓	2387	↓	7	↓
2016	743	↓	2040	↓	3055	↓	−163	↓
2017	655	↓	1450	↓	2325	↓	−359	↑
2018	302	↓	1261	↓	1360	↓	−535	↑
2019	116	↓	979	↓	306	↓	−543	↑
2020	−2	↓	n.a		n.a		n.a	
Target	−450		−1400		−2200		−200	

n.a—not available; source: (Eurostat 2021c) (data extracted on 3 July 2021).

This scenario was already expected even before the pandemic crisis emerged. The European Commission (2019) had already presented in the report entitled ‘Assessment of the Europe 2020 Strategy’ a discouraging prediction about the outcome of this indicator due to the impacts of the previous financial and economic crisis. In addition to no reduction in poverty compared to 2008, during the last decade, Greece, Spain, and Italy have significantly increased the number of people in socioeconomic vulnerability, as Eurostat data show.

In Greece, the increase occurred between 2011 and 2013, slowly recovering from 2015 to 2017. In 2018, the reduction of poverty and social exclusion started to be more evident. Greece managed to reduce the number of people in poverty by 2020, but it is still far from its target. In Spain, the risk of poverty and social exclusion worsened, with a rather sharp change between 2013 and 2014, only starting its recovery since 2015. The Italian scenario is particularly concerning and irregular. We point out that of the four countries analyzed, Italy was the only one that did not sign the Economic and Financial Assistance Program. In Italy, poverty and social exclusion had a large increase in 2011, with signs of a slight recovery in 2013. However, in 2015, the risk of poverty and social exclusion was aggravated, particularly in 2016.

Spain and Italy, despite having improved the indicator in 2019, were unable to recover from the increases suffered in the previous decade. The European Commission (2019) highlights that the financial crisis affected the Southern European countries (Greece, Spain, and Italy) and that, contrary to other member states, these countries have not yet recovered. In these cases, the European Commission (2019) stressed that the spending on benefits was generous, but it was not allocated effectively to alleviate poverty.

In Portugal, there were oscillations between 2008 and 2014, which, in the first years, seemed to lead to a positive development but which, in 2013, contradicted the expected results. However, in 2014, there was a continuous positive evolution in the reduction of poverty and social exclusion. The case of Portugal contrasts the Southern European trend since it managed to exceed its target in 2017, values that were maintained until 2019.

4.2. European Response to the COVID-19 Pandemic Crisis: Social Protection Recovery Strategies

Considering the official data published and the key measures to reinforce economic and social resilience, we can highlight the amounts assigned to each country in Southern Europe (Table 3).

Table 3. Next Generation EU financing to Greece, Spain, Italy, and Portugal.

Country/Measures	(EUR—Millions)
Greece	Total
	30,500
	Key measures to reinforce economic and social resilience
	Support for private investment
	12,700
	Supporting employment and social inclusion
	740
	Increasing childcare
	159
	Introducing a comprehensive national public health program
	254
	Increasing the efficiency of public administration
	670
Spain	Total
	69,500
	Key measures to reinforce economic and social resilience
	Transformation of the tourism sector
	3400
	Tackling labor market segmentation and modernization of active labor market policies
	2400
	Action Plan against youth unemployment:
	756
	Vocational training
	2000
Italy	Total
	191,500
	Key measures to reinforce economic and social resilience
	Education and labor market
	26,000
	Public administration and the justice system
	3700
	Enhancing social and territorial cohesion
	13,200
	Healthcare, telemedicine and homecare
	15,600
Portugal	Total
	16,600
	Key measures to reinforce economic and social resilience
	Supporting program for access to housing
	1200
	Youth impulse
	130
	Establishment of the Portuguese National Promotional Bank and capitalization of companies
	1600

Source: Data retrieved from [European Union \(2021a, 2021b, 2021c, 2021d\)](#).

According to the information provided as a highlight of social and economic investment, differences between what were the options of each country can be identified. In the case of Greece, there was a large investment in the private sector, but there were also measures in the health sector, employment and social inclusion, childcare, and public administration ([European Commission 2021a; European Union 2021a](#)). Spain highlights investment in the tourism sector, in measures to combat youth unemployment and employment policies, and in training ([European Commission 2021b; European Union 2021b](#)). The Italian government, which, among the four countries, has the highest amount allocated, invested in the areas of education and employment, social and territorial cohesion, and on-site and remote health care, and in the public administration and justice system ([European Commission 2021c; European Union 2021c](#)). Finally, Portugal had less investment in employment, focusing on young people and housing, and strong investment in companies ([European Commission 2021d; European Union 2021d](#)). Thus, we present those measures that stand out as the actions of each country, choosing to focus on social employment and social inclusion policies based on 162 social protection measures.

4.2.1. Greece

From the social protection measures in Greek government program, we analyze 21 measures from two axes: to promote job creation and participation in the labor market and to increase access to effective and inclusive social policies (Table 4).

In this context, the plan presented aims to move forward with reforms in labor legislation and the strengthening of active employment policies, including the most vulnerable groups. There was also investment in social protection for persons with disabilities, childcare protection, homeless people, and refugees. Also present in these measures is the relationship between the modernization and digitalization of social and public services and social integration.

Table 4. Social and employment protection measures in the Greek recovery and resilience plan.

Country/Component		N
Greece		
3.4.	Increase access to effective and inclusive social policies	13
Type	Related measures	
Investment	Social Benefits Optimization	1
Investment	Creation of childcare units within large companies	1
Investment	Digital Transformation of the social support system	1
Investment	Social Integration	2
Investment	Digital Transformation of the immigration and asylum system	1
Investment	Promote integration of the refugee population into the labor market	1
Reform	Disability	3
Reform	Child Protection	3
3.1.	Promote job creation and participation in the labor market	8
Type	Related measures	
Investment	Digital Transformation of Labour Systems	3
Investment	Digital Transformation of the Public Employment Service (OAED)	1
Investment	Restructuring and rebranding of OAED local PES (KPA2)	1
Reform	Modernization and Simplification of Labor Law	1
Reform	Reform of Passive Labor Market Policies to Support Transitions to Employment	1
Reform	Active Labor Market Policies Reform	1

Source: Data retrieved from [European Commission \(2021a\)](#).

4.2.2. Spain

In the case of Spain, we have selected 48 measures proposed by the government on the following axes: an action plan for the care economy, strengthening equality and inclusion policies; new public policies for a dynamic, resilient, and inclusive labor market; and pensions (Table 5).

Table 5. Social and employment protection measures in the Spanish recovery and resilience plan.

Country/Component		N
Spain		
22	Action plan for the care economy, strengthening equality and inclusion policies	15
Type	Related measures	
Investment	Long-term care and support plan: deinstitutionalization, equipment and technology	3
Investment	Plan for the Modernization of Social Services—Technological transformation, innovation, training, and strengthening childcare	2
Investment	Spain Accessible Country Plan	1
Investment	Plan Spain protects you from gender violence	1
Investment	Increasing the capacity and efficiency of the reception system for migrants and applicants of international protection	1
Reform	Strengthening long-term care and promoting a change in the model of support and long-term care	1
Reform	Modernizing public social services and giving them a new regulatory framework	1
Reform	Adopt a new law on protecting families and recognizing their diversity	1
Reform	Reforming the reception system for migrants and applicants of international protection	1
Reform	Improvement of the system of non-contributory financial benefits of General State Administration	3

Table 5. Cont.

Country/Component		N
Spain		
23	New public policies for a dynamic, resilient and inclusive labor market	23
Type	Related measures	
Investment	Youth Employment	1
Investment	Female employment and gender mainstreaming in active labor market policies	1
Investment	New skills for the green, digital and productive transition	1
Investment	New territorial projects for rebalancing and equity	2
Investment	Governance and boost of policies to support activation	2
Investment	Comprehensive plan to boost the social economy	1
Investment	Promoting inclusive growth by linking social inclusion policies to the national minimum income scheme ('IMV')	2
Reform	Regulation of teleworking	1
Reform	Measures to close the gender gap	1
Reform	Regulation of the work of home distributors by digital platforms (riders)	1
Reform	Simplification of contracts: generalization of the open-ended contract, reasons to use temporary contracts, and regulation of the training/apprenticeship contract.	1
Reform	Modernization of active labor market policies (ALMP)	3
Reform	Permanent mechanism for internal flexibility, job stability, and reskilling of workers in transition	1
Reform	Review of hiring incentives	1
Reform	Modernization of collective bargaining	1
Reform	Modernization of sub-contracting activities	1
Reform	Simplification and improvement of unemployment assistance	1
Reform	Digitalization of the Public Employment Services (PES) for its modernization and efficiency.	1
30	Pensions	10
Type	Related measures	
Reform	Separation of sources of social security funding	1
Reform	Maintenance of the purchasing power of pensions, alignment of the effective retirement age with the statutory retirement age, adaptation of the calculation period for the calculation of the retirement pension to new careers and replacement of the sustainability factor by an intergenerational equity mechanism	4
Reform	Reform of the Social Security contribution system for the self-employed	1
Reform	Streamlining of maternity add-ons	1
Reform	Review of the current supplementary pension system	2
Reform	Adjustment of maximum contribution base	1

Source: Data retrieved from [European Commission \(2021b\)](#).

The proposals in the Spanish Plan aim to modernize and strengthen social services and social inclusion policies through a long-term care model and present changes in public policies to face structural challenges in the Spanish labor market. Legislative reforms include areas such as diversity in families, international protection for migrants, and social services. It also includes benefits for people at risk of vulnerability or social exclusion, such as the implementation of the Minimum Vital Income, the improvement of the non-contributory system, and investment in social protection for the elderly, children, and victims of violence. The focus on labor market challenges covers areas such as telework, digitalization, and the promotion of measures for greater gender equality. There is also a proposal for reforms to the pension system and contributions to the social security system.

4.2.3. Italy

The analysis of the plan presented by the Italian government focused on 49 measures along three axes: employment policy; social infrastructures, families, communities, and the Third Sector; and special interventions for territorial cohesion (Table 6).

Table 6. Social and employment protection measures in the Italian recovery and resilience plan.

Country/Component		N
Italy		
5.1	Employment policy	19
Type	Related measures	
Investment	Strengthening Public Employment Services (PES)	2
Investment	Gender equality certification system	3
Investment	Strengthening the dual system.	1
Investment	Universal Civil Service	1
Investment	Creation of women's enterprises	3
Reform	ALMPs and Vocational Training	5
Reform	Undeclared Work	4
5.2	Social infrastructures, families, communities, and the third sector	21
Type	Related measures	
Investment	Supporting vulnerable people and preventing institutionalization	2
Investment	Autonomy patterns for people with disabilities	2
Investment	Housing First and Post Stations	2
Investment	Investments in projects of urban regeneration, aimed at reducing situations of marginalization and social degradation	2
Investment	Urban Integrated Plans—general projects	5
Investment	Innovation Program for Housing Quality	2
Investment	The Sport and Social Inclusion project	2
Reform	Framework Law for Disability	2
Reform	Reform for non-self-sufficient elderly persons	2
5.3	Special interventions for territorial cohesion	9
Type	Related measures	
Investment	Inner Areas Enhancement of community social services and infrastructures	2
Investment	Inner Areas—Territorial proximity health facilities	2
Investment	Enhancement of assets confiscated from organized crime	3
Investment	Structured socioeducational interventions to combat educational poverty in the south, supporting the Third Sector	2

Source: Data retrieved from [European Commission \(2021c\)](#).

This plan stands out for the reform of active labor market policies to increase services' efficiency, the promotion of gender equality, and the investment in young people. The focus on skills development and employability plans seeks to contribute to the Guaranteed Employability of Workers program, including the most vulnerable and excluded groups in the labor market. Other priorities of the measures are to combat undeclared work and illegal work and to invest in the gender equality certification system and in the creation of women's enterprises. In the area of social protection, it stressed the investment and legislation promoting the autonomy of people with disabilities, elderly people, and homeless people. There is also a commitment to invest in projects with sports for social inclusion, housing quality, and urban regeneration, aimed at reducing situations of social marginalization and improving the territories. The social intervention measures also include the support of community social services and the third sector in Southern Italy.

4.2.4. Portugal

The Portuguese government defined a set of measures for mainland Portugal and the islands. The analysis of 44 measures of the Portuguese plan focused on the following axes: social responses and qualifications and skills (Table 7).

Table 7. Social and employment protection measures in the Portuguese recovery and resilience plan.

Country/Component		N
Portugal		26
3	Social responses	
Type	Related measures	
Investment	New generation of equipment and social responses	5
Investment	Accessibility 360°	4
Investment	Strengthening social responses in the Autonomous Region of Madeira (ARM)	2
Investment	Implementing the Regional Strategy for Combating Poverty and Social Exclusion—Social Support Networks (ARA)	5
Investment	Platform + Access	3
Investment	Integrated operations in disadvantaged communities in the Metropolitan Areas of Lisbon and Porto	3
Reform	National Strategy to Combat Poverty	1
Reform	National Strategy for the Inclusion of Persons with Disabilities 2021–2025	1
Reform	Facilities and Social Responses Supply Reform	1
Reform	Contracting of Integrated Support Programs for Disadvantaged Communities in Metropolitan Areas	1
6	Qualifications and Skills	18
Type	Related measures	
Investment	Modernization of vocational education and training institutions	4
Investment	Sustainable Employment Commitment	1
Investment	Adult incentive	1
Investment	Youth impulse—STEAM	3
Investment	Adult Qualification and Lifelong Learning (ARA)	2
Reform	Reform of vocational education and training	1
Reform	Reform of cooperation between higher education and public administration and enterprises	2
Reform	Reducing restrictions in highly regulated professions	1
Reform	Agenda for the promotion of decent work	1
Reform	Combating inequality between women and men	2

Source: Data retrieved from [European Commission \(2021d\)](#).

The measures in the Portuguese plan include investment in third-sector institutions and social facilities through the new generation of equipment and social responses targeted at disadvantaged communities and groups. These stand out as promotion elements for the social protection of children, the elderly, persons with disabilities, and other persons with dependency and situations of poverty and social exclusion. There was also a concern to invest in dwellings, public spaces, and services to people with reduced mobility, improving accessibility conditions. Among the measures, there are specific action plans for more vulnerable communities in the main metropolitan areas and autonomous regions. Regarding the labor market, the measures focus on the development of training and skills as a measure for better qualification and participation in the labor market for adults and young people in areas such as science and technology. This investment involves developing new courses and equipment for training purposes, bringing companies closer to higher education. Additionally, there is the development of measures that address decent work in order to promote unemployment protection and greater gender equality.

5. Discussion

The analysis of these indicators made it possible to present a portrait of the impacts of political strategies in Europe, namely, in central aspects that are vital to European values. The implementation and evolution of the Europe 2020 Strategy have jeopardized, to a certain degree, the social welfare of citizens and the development of the economies of Member States. The results of the Europe 2020 strategy have shown that efforts are still needed to achieve the desired targets to promote employment and to fight poverty and

social exclusion in Southern European countries. A clear point in this analysis is that poverty reduction and employment increase only started to improve after the austerity programs were completed.

With the current pandemic crisis, there was a greater increase in social risks in Europe, and these effects are expected to hinder a possible recovery in the long term. Regarding the response to the socioeconomic impact of the COVID-19 pandemic, the European Commission provided specific recommendations to effective active support for employment (European Commission 2021e). We underline that employment policies should be in line with the European social model to promote sustainable economic growth, high living standards and working conditions, and a more equal society ‘by ending poverty and poverty wages, guaranteeing fundamental human rights, essential services, and an income that allows every individual to live in dignity’ (International Labour Organization 2015, p. 14).

In addition to the implications already pointed out in the Europe 2020 Strategy, the effects of this crisis put at risk the achievement of the 2030 Agenda for Sustainable Development (United Nations 2015), which has already been weakened (United Nations 2020b). Of the 17 goals of the 2030 Agenda, we highlight the risks in Quality Health (SDG 3), with evident effect due to the COVID-19 pandemic. The health crisis has affected the life expectancy and mortality rates of populations at a global level, with implications in purchasing equipment, vaccines, and medication and health professionals’ work. For Poissonnier (2020), during the last decades, austerity policies imposed by international financial institutions have weakened public services and systems, including the health sector. However, the crisis we are now facing shows the importance of a well-functioning State that can provide essential and inclusive public services to the entire population (Santos 2020). Additionally, there is political concern about gender equality (SDG 5), decent work and economic growth (SDG 8), and reducing inequalities (SDG 10) in the recovery and resilience plans analyzed. These priorities on the agenda support the need for economic and social recovery measures as data from the pandemic crisis shows an increase in the occurrence of violence against women as well as unpaid female work with domestic chores, teleworking, and support in the education of children (Organisation for Economic Co-operation and Development 2020; United Nations 2020a).

It is important to note that the effects of COVID-19 on the 2030 Agenda are accentuated in the first two goals: no poverty (SDG1) and zero hunger (SDG2), which end up being affected by the aforementioned reasons. Following the example of previous crises, we can see that poverty and, consequently, hunger have increased (Casquilho-Martins 2018). Food insecurity is added to the fact that there are countries where people live in an informal economy with no unemployment benefits, thus leaving households without any kind of income. These seem to be the greatest threats that will be faced and that hinder the achievement of the 2030 Agenda and the European Pillar of Social Rights Action Plan (European Commission 2021f).

In this sense, the European Union launched a set of measures that were consolidated in a strategy of economic and social recovery. As verified, each country’s measures follow similar paths as to what concerns the protection of more disadvantaged groups or those under social exclusion, such as persons with disabilities, the elderly, children, women, homeless people, and refugees. However, these groups were further exposed during the pandemic, increasing the risk to their already damaged social well-being (Organisation for Economic Co-operation and Development 2020; United Nations 2020a; Redondo-Sama et al. 2020), accentuating existing inequalities in the economic, social, political, and environmental dimensions of sustainable development (Poissonnier 2020). The current economic crisis suspended and reduced the production or supply of services, increased unemployment, and drastically reduced economic growth (e.g., tourism sectors, restaurants, airlines, commerce). This has had severe consequences for the labor market and for the situation of workers, with obvious risks for the fundamental rights of citizens. Santos (2020) reinforces this idea, highlighting the inequalities and intersectoral impacts that the new coronavirus has

brought out and the post-COVID social and economic consequences that will arise. In this sense, it is important that the application of financial funds considers the precariousness of workers, working conditions, and the ineffectiveness of social protection systems for the most vulnerable groups, deeply affected by the economic repercussions (Poissonnier 2020).

While different national responses to address the consequences of this crisis are recognized (Pereirinha and Pereira 2021), there has been a concern in Southern European countries to maintain a welfare model that protects citizens and economies (Organisation for Economic Co-operation and Development 2021). The four countries under analysis presented measures aimed at complying with the European values of social, territorial, and environmental cohesion, combating social inequalities in accordance with the commitment of the 2030 Agenda. However, the presentation of the programs shows differences in how these groups are covered and on labor issues. The reform measures in labor legislation and in employment policies aimed at citizens are more present in the countries that are further away from the goals of the 2020 strategy, such as Greece, Italy, and Spain. Portugal, on the other hand, opted for labor market measures that are more focused on youth training and companies. One aspect present in all countries is the promotion of measures for gender equality in the labor market. These issues are important because the pandemic has worsened existing inequalities in the situation of women both in the labor market and in family life (World Bank Group 2020b). Among the different countries, Spain is the only one that points out a set of measures for the contributory and non-contributory social security system, including pensions. Although Portugal has come closer to its goal in the 2020 Strategy, the actions to fight unemployment need to be reinforced (Almeida and Santos 2020).

Social protection measures for people with disabilities are also present in their plans as a priority for investment and reforms, aimed at enhancing social inclusion and more accessibility. The isolation and limited access to services and care caused by the pandemic have become a major threat to people with disabilities (Thelwall and Levitt 2020).

The fight against poverty is also visible in the programs of the various countries, although with different measures. In Spain, we highlight the implementation of the Minimum Vital Income (Plá and Gambau-Suelves 2020) and the improvement of the social benefit against negative effects on income distribution. Portugal opted to invest in the introduction of the National Strategy to Combat Poverty. Spain and Greece also invested in international social protection for migrants and refugees. Protection measures for refugees, asylum seekers, and migrants in Greece are particularly relevant as Greece is the major entry point for people seeking safety in Europe (Kondilis et al. 2021).

It should be noted that the third sector has played an important role in social protection in Southern European countries, marked by sociohistorical features (S. Ferreira 2006). During the pandemic, non-profit organizations dealt with a series of difficulties in responding to the social impacts of the pandemic, which implies effective support for their action (Cardoso et al. 2020; Cepiku et al. 2021; Eurofound 2020). The digital and ecological transition is transversal to social protection measures. For example, Spain is moving forward with the modernization of social services, including platforms for projects developed by the third sector, and Portugal has allocated ecological vehicles to non-profit institutions. In Greece, a major investment is planned for the digital transformation of the social support system, labor systems, and public employment service.

The responses devised by the European mechanisms and the reality in a crisis context have led to a reflection opportunity. However, there are some limitations to this study. The analysis of the quantitative data refers to the context of the international crisis from 2008 to the beginning of the pandemic crisis, and it is not yet possible to analyze the medium and long-term consequences. We also consider that although this analysis focuses on the measures proposed by Southern European countries, the actual implementation of these funds by countries may differ and promote greater economic and social development but that cannot yet be assessed at this stage. Still, we consider that this analysis can contribute to future studies that will allow us to understand if these countries have managed to evolve positively towards the established goals. This is particularly important to understand the

role of each country, their resilience and recovery plans, and whether these measures can further strengthen a Social Europe. Thus, more social science research will be fundamental to improving this goal and contributing to better public policies.

6. Conclusions

In a context of global emergency, it becomes necessary to rethink social protection as the construction of an integrating social model for the affirmation of human rights and of the European social model. The strengthening of social relations and the sense of social justice point to a participation based on the social rights of citizenship as well as to the improvement of welfare and living conditions. It is fundamental that the values and principles of social cohesion do not allow themselves to be overshadowed by mere protection mechanisms for market failure but rather by the true construction of a balanced economic and social structure. Thus, there is a challenge for European countries to balance their welfare models, promoting forms of social protection prepared for the new social risks and adjusting to the necessary modernization without forgetting the values of Social Europe (Ranci et al. 2014).

The influence that the economic and financial crisis of 2008 had on the countries of Southern Europe is remarkable and did nothing to ensure that in 2020 societies will be prepared for a new global crisis. However, we cannot forget the initial premise of the 2030 Agenda—“Leave no one behind”. This commitment depends on everyone—citizens, organizations, and governments. There is no alternative to the current situation without keeping this responsibility in mind, and even though we know that there will always be lasting trends, this moment also gives us the opportunity to change and not lose sight of the already-made achievements. Therefore, we must emphasize the importance of partnerships for the implementation of the goals and consolidate the 2030 Agenda as well European social rights.

Learning from the past and from each challenge strengthens us and makes us more tolerant. We should not forget that we are all in the same boat and that at any moment, even the strongest can drown or even not know how to swim. The unforeseen future may expose us to further vulnerabilities and surprising situations. Whether individual citizens, managers of organizations, or government members, in the end, we are talking about human beings, and it is in this development that we must invest if we want a sustainable future.

It is important to note that in addition to the consequences already identified, new conflicts may prevent effective measures from being taken against the social and economic impacts of the pandemic. The spread of the virus may also increase social tensions due to existing conflicts (P. M. Ferreira 2020) and the potential for new conflicts (e.g., worsening of the migratory crises). By gaining an experiential notion of current interdependencies, fragilities, priorities, and contradictions (Pereira 2020), we should invest in a logic of promoting peace, justice, and effective institutions, in line with the global commitments of the 2030 Agenda.

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