A Long Road South. Southern Europe as a Discursive Construction and Historical Region after 1945

Martin Baumeister and Roberto Sala

"In the space we read the time": In this catchy book title the historian Karl Schlögel closely links space and history with a suggestive textual metaphor. He presents physical space as a written text, where one can read the traces of the human past (Schlögel 2003). There are not so many historians who follow Schlögel's motto of deciphering space as a man-made historical source. In the humanities and social sciences spatial categories, however, play a crucial role in defining units of research, whether villages or cities, states, nations, smaller or larger regions among others, as simple 'containers' or even as particular 'individualities'. The idea of a concurrence of space and history or culture respectively has been considered a self-evident truth in academic discourse for a long time. A wide range of disciplines in the field of area studies is defined by its regional focus, which generally implies some strong assumptions about particular features distinguishing one region from others as a cultural and historical entity. Nevertheless, some decades ago in light of the 'spatial turn' the idea of fixing history and culture in space was radically questioned by considering spatial categories basically as a product of cultural marking. Edward Said's critique of 'Orientalism' perhaps is the most famous case of deconstructing a major spatial concept as a result of explicit as well as implicit mental mapping, expressing claims to power and supremacy (Said 1978).

Even today, almost forty years after the publication of Said's seminal work, the divide has not been overcome between 'constructivists' who refer to spatial concepts as useful analytical tools and 'deconstructivists' who accuse 'spacing' of being a power game and therefore refuse to analyze spatial units as particular individual entities defined by common structures and cultural traits.[1] We can see this opposition for example in the dispute between two historians studying Southeastern Europe. Maria Todorova in an influ-

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1 A survey of the debate is given by Macfie (2000). The further development of 'Orientalism' after Said is discussed by Burke III and Prochaska (2008).

ential book, published for the first time in 1997, analyzed the Balkans as a discursive construction, as a sample of predominantly negative stereotypical images closely intertwined with politics which, following Said, she called "Balkanism". Instead of considering the Balkans as a cultural or historical region of its own and in this way, as she warned, falling into the trap of essentialism, teleology and determinism, she proposed considering the role of "historical legacies" as perceived and referred to by concrete groups and individuals in order to define a region in specific historical and political contexts (Todorova 1997; 2002; 2005). Her colleague Holm Sundhaussen, however, defended the concept of the Balkans as a distinct historical-cultural region with a "unique, fascinating and sometimes dreadful profile" (Sundhaussen 1999, 651), formed, as he maintained, in a long historical process. For his part, he was convinced of the usefulness and legitimacy of studying historical regions, defined by patterns of common structures and interrelations.[2]

Looking at the Todorova-Sundhaussen controversy[3], there seems to be no middle ground between conceiving of spaces as discursive products or as structured entities. This general problem has to be kept in mind when it comes to reflect on another key concept related to Europe's South, i.e. 'Southern (Western) Europe'. On the one hand, contemporary Italy, Spain, Portugal, and Greece appear to share important analogies. On the other, as both a political and a scientific category 'Southern Europe' seems often to be affected by normative and moral assumptions.

To overcome the impasse that emerges from opposing structures and discourses, it must be realized that both perspectives are two sides of one coin—as this paper argues. Images of the South are, indeed, primarily an expression of power relations within Europe; in this context 'Southern Europe' is a relatively young (research) category that was deeply shaped by the political climate in the post-war period, and that, at once, has absorbed long-term narratives on Europe's South and the 'Mediterranean'. However, to contextualize 'Southern Europe' as a concept rooted in the struggles for supremacy between European societies does not mean, however, to get rid of Southern Europe as a field of enquiry; it rather confirms that (Western) European history must be read with regard to interdependencies between (changing) 'centers' and 'peripheries'. From this perspective, purged from normative assumptions, the question of to what extent Italy, Spain, Portugal, and Greece

2 For a similar position on 'historical regions' see Mishkova et al. 2013, Troebst 2003.
3 For further debates see Rutar 2014.

have shared similar paths can offer essential insights into Europe's present and recent past.

Southern Europe as a Category in Social Sciences and Historiography

'Southern Europe', contrary to Western or Eastern Europe among others, is not a particularly prominent paradigm in academic discourse. Mostly referred to as Italy, Spain, Portugal and Greece, it represents, however, an influential analytical category within social sciences. Since the seventies and eighties many studies in disciplines such as sociology, economics and political science have considered these countries as an area with common features and paths of development. At least four main thematic strands—widely tackled in this volume—shape this manifold field. Looking at Southern Europe, scholars have, firstly, examined the economic and political integration into the European Union (Gibson 2001; Holman 1996; Magone 2003; Simonazzi et al. 2013; Williams 1984). They have, secondly, discussed welfare state structures as well as social policy issues (Ferrera 2005, Rhodes 1997), and, thirdly, raised the question of whether these states share similar political cultures and experiences (Arrighi 1985; Diamandouros et al. 2001; Gunther et al. 1995; Gunther et al. 2006; Linz 1996; McLaren 2008). Fourthly, social science scholars have discovered new migration movements to that area, which for a century or so has been a classical region of emigration, as a key field of investigation (King et al. 2000). Moreover, Southern Europe has served as an analytical framework to deal with such different topics as international security politics and international relations, gender or welfare (Yachir 1989; González et al. 1999; Santos 2013).

These studies mostly offer interpretative models that, taking into account national and/or regional characteristics, do not approach Southern Europe in a reductionist way. Adopting a comparative perspective, several analyses rather enhance the specific experiences of single countries. However, the basic assumption that Southern Europe represents an area shaped by various analogies is never questioned. Political scientist Maurizio Ferrera, one of the most influential scholars within the field of studies on Southern Europe, writes:

"The nations of Southern Europe have followed a specific path to modernization (in the broad sense of the concept) and still share a number of common traits in their cultural backgrounds and political economies. There are, of course, significant differences between the four countries [i.e. Italy, Spain, Portugal, and Greece] of the region: the intra-area variation is certainly greater than in the Nordic context, though probably lower than in Central Continental Europe. It would be difficult to deny that the notion of 'Southern Europe' has not only a geographical, but also a substantive, cultural and politic-economic connotation." (Ferrera 2005, 3)

As an analytical category, the rank of Southern Europe within historiography is partly different. We cannot overlook that several historical studies have considered this area in a similar way as social sciences, i.e. to refer to Italy, Spain, Portugal, and Greece as a distinct cluster of countries within post-war Europe. Recently, in his social history of contemporary Europe, Béla Tomka has defined Southern Europe as a European region referring to these four countries and clearly distinguished from Western Europe, which "includes North Western Europe (United Kingdom/Great Britain, France, the Netherlands, Belgium and Ireland), Central Europe (Germany/FRG, Switzerland, and Austria) and Scandinavia (Sweden, Denmark, Norway, and Finland)" (Tomka 2013). Also monumental collective works such as the *Cambridge Economic History of Modern Europe* make systematic use of this regional macro-category (Broadberry and O'Rourke 2010).

Already in the eighties and nineties historians used Southern Europe as a strong conceptual framework. This is not only true for Giulio Sapelli's impressive study that conferred to the term historiographical deepness (Sapelli 1995).[4] Within the context of a broad social and economic history of Western Europe, Anthony Sutcliffe, for instance, described this area as "Europe's southern fringe [...] made up of three economic backwards countries—Spain, Portugal, and Greece—and a country which combined advanced and backward regions, Italy" (Sutcliffe 2014 [1996], 81). Moreover, in 1986, the influential historian of modern Spain Stanley G. Payne raised explicitly the question of whether Southern Europe represented a useful analytical perspective:

"In recent years a number of historians and social scientists have advanced the notion of the regional model of 'southern Europe' as a useful comparative frame of reference for understanding common features of modernization in Italy, Spain, Greece and Portugal. Though the concept has never been fully defined or gained common acceptance, it rests on the observation that the four southernmost countries of Europe

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4 Sapelli belongs to the authors including Turkey in Southern Europe.

underwent generally similar changes along the path to political development and economic modernization, particularly during the late nineteenth and early twentieth centuries." (Payne 1986, 108)

Payne concluded his analysis by observing that, in spite of not offering a framework valid for all economic, political, and social processes, Southern Europe constituted a useful comparative category for key research issues such as the study of a common path of development (Payne 1986, 115). By raising similar questions, in 1992 Edward Malefakis looked at the career of what it still was at that time—a young concept:

"About twenty years ago, in the early seventies, a new term entered the academic vocabulary—Southern Europe. Occasionally the term included France, and some-times Yugoslavia, Malta, Cyprus and even Turkey as well. But for the most part it referred to four countries—Portugal, Spain, Italy & Greece. It was logical that this should be so, because of the striking similarities in their recent development. All had been economically backward, socially divided and politically unstable countries. […] The events of the past two decades have thus confirmed the usefulness of the idea of "Southern Europe," and converted it into one of the principle concepts through which we analyze the European experience of the present and future. But to what extent is it also viable in the past? […] The concept of Southern Europe has gained currency among sociologists, anthropologists and above all political scientists; does it also merit adoption by historians?" (Malefakis 1992, 1)

Like Stanley Paine and—more recently—Effi Pedaliu (2013), Malefakis came to the conclusion that Southern Europe is a useful tool for research on contemporary European history (Malefakis 1992, 80). Most remarkable is the fact that Malefakis considered the concept a product of social sciences. By using it, historians would have adopted an analytical category developed by other disciplines.

This leads us to the question of whether Southern Europe, as a research category, has had similar success in historiography as it has had in social sci-ences. Besides the works cited above, further studies in modern and con-temporary history have used the term to identify Italy, Spain, Portugal, and Greece, as regards both longer-time scales (Bock et al. 2003, Baumeister and Liedtke 2009; Taveres de Almeida et al. 2003) and the post-war period (Boulder 2002; Rizas 2012).[5] In comparison to the considerable social scien-tific production on the topic, however, historical studies appear not to have
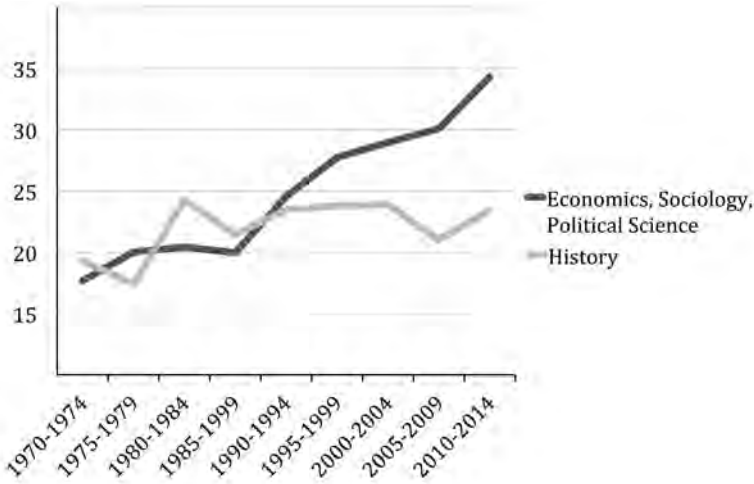
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5 Focusing on authoritarian regimes and democratization processes after 1945, some au-thors have associated Southern Europe primarily with the latter three countries (Del Pero 2011; Judt 2005 [2011]).

assumed Southern Europe to be a strong analytical framework for looking at these four countries. While social scientists have carried out intense debates on different issues, such as a Southern European model of welfare state (Rhodes 1997), only a handful of historians have proposed strong theoretical claims as far as common paths of Italy, Spain, Portugal, and Greece are concerned. Several historical studies often use the category Southern Europe in a more general—we might say geographical—way to indicate also a variety of additional countries, i.a. Austria (Grell et al. 2005) and France (Pacquette 2009). For historians influenced by Ferdinand Braudel's perspectives, the European South consists in the broad region reaching from the Iberian Peninsula to Northern Africa, from the Balkans to the Levant (Schenk and Winkler 2007); for scholars of the early modern, the Mediterranean area still represents a strong analytical framework (Piterberg 2010).

Statistical evidence helps illustrate to what extent Southern Europe has represented a relevant research category for the present and recent past. Using one of the largest databases of scientific journals, we have conducted a word frequency analysis on the words Southern Europe and Italy, Spain, Portugal and Greece. To determine an interpretative scale, we have calculated, with regard to five-year periods, in how many items these terms appear out of a thousand articles containing the word Europe in two different groups of journals: historical ones and others associated with three social scientific disciplines, i.e. economics, sociology, and political science.

Run for "Southern Europe", the word frequency analysis offers first interesting results. Until the eighties the frequency of this term was comparable in both groups. Afterwards, it has remained stable in historical journals, while it has increased remarkably in social scientific revues (see Graph 1). This appears to confirm that the category has gained more relevance in social scientific than in historical studies. In spite of reaching a difference of almost 50%, however, the gap between the frequency indexes does not allow for assuming the term "Southern" had a radically different status in the two groups.
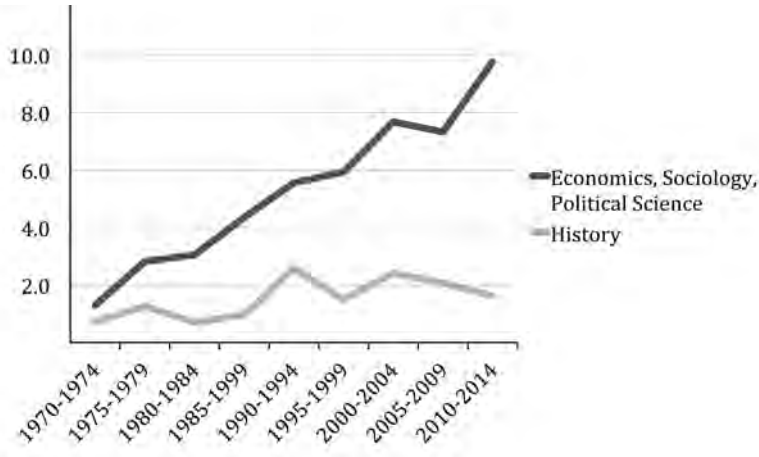
Graph 1: Word frequency in scholarly journals: "Southern Europe"

Source: Elaborations on Jstor.org data (accessed on March 23, 2015)

The word frequency analysis provides indisputable results if we search for articles containing both the terms Southern Europe and Italy, Spain, Portugal, and Greece, i.e. if we ask to what extent the former is related to the latter. At the beginning of the seventies, our frequency index amounts to approximately 1 both in historical and in social scientific journals (0,7 and 1,3 respectively, see Graph 2), i.e. these terms appeared only in one item out of a thousand articles containing the word Europe. With regard to historical studies, we can observe an increase up to the value of 2,6. However, as far as economics, political science, and sociology are concerned, the growth is rather significant. The index amounts to 5,6 in the early nineties, and reaches a value of almost 9,8 in the last period, more than five times more than in historical reviews. The figures are quite evident: As related to Italy, Spain, Portugal, and Greece, since the seventies the specific use of "Southern Europe" has gained more and more influence in social scientific studies, while it has remained in the background in historical research.

Graph 2: Word frequency in scholarly journals: "Southern Europe" in combination with Italy, Spain, Portugal, and Greece

Source: Elaborations on Jstor.org data (accessed on March 23, 2015)

The analysis of scholarly journals raises the question of why the tendency of considering Italy, Spain, Portugal, and Greece as a common area has been predominant in social sciences and pretty marginal in historiography. The fact that social scientists have a strong tradition in area studies and international comparative research (Jacob and Hawkins 2011, 4), while historians—despite the "revolution" towards transnational history (Iriye 2013, 70) and the increasing attention to "historical regions" (Troebst 2003)—are still more inclined to focus on national developments, might have played a role; however, it does not offer a satisfying explanation.

These different trends are rooted in two interconnected dimensions: the Cold War and the European integration process. In the second half of the 20th century, "the very nature of bloc building had encouraged the search for historical narratives that legitimated such supranational alliance systems, therefore going beyond the national framework" (Berger 2007, 64). In other words, influenced by the East-West discourse, historiography tended to conceive Western Europe as a homogenous region; rather than neglecting them, it paid little attention to internal differences such as the contradictions between democratic and authoritarian regimes on the one hand, and between economic underdevelopment and material progress and wealth on the other. After the breakdown of the iron curtain, scholars have developed more dif-

ferentiated approaches to contemporary (Western) European history (Judt 2005; Mazower 2000). Nevertheless, within the transnational historiographic canon, the recent past of Italy, Spain, Portugal, and Greece has still remained in the shadow of the 'core countries'. In a bibliography which records historiographical studies concerning post-war Western Europe, published in the mid-nineties, almost 250 works cited referred to France and (Western and Eastern) Germany, while only approximately 100 were related to Italy and Spain (Higbee 1996, 49–139). As a research category borrowed from the social sciences, Southern Europe has thus not been adopted but by a niche of historians, without advancing to a mainstream reference. This is true also after the financial and debt crisis, which does not appear to have evoked a major interest in the European South among historians, at least in the short term.

Not limited to studies on post-war Europe, the marginal position of these countries has tradition in international historiography. In the early nineties, Derek H. Aldcroft and Richard Rodger (1992) published one of the most complete historiographical bibliographies on European social and economic history, covering the period between 1700 and 1939. Remarkably, Southern Europe constituted one of the regions considered in the book. Works cited were however much fewer as regards "Southern European" compared to those regarding "Western European" countries. The former was employed in only one-fifth of the pages dedicated to the latter (see Table 1). While the bibliography on France and Germany contained 80 pages, the references to Italy and Spain did not reach even 15 pages. This disparity concerned also smaller countries such as Belgium and the Netherlands on the one hand, and Portugal and Greece on the other.

Cold War discourses deeply affected social sciences as well, one may think of the rise of modernization theory (Gilman 2003). However, present-oriented disciplines such as economics, sociology and political science found transnational objects partly situated beyond the East-West Conflict more easily. This is especially true for the "Mediterranean Enlargement" of the European Economic Community. Although the European integration process was deeply connected with the Cold War, as regards both the "hot" and the "détente" phases (Hanhimäki and Westad 2003, 313–346; Soutou 2007), it gained momentum independently from that major geopolitical controversy. When Greece, in 1981, and Spain and Portugal, in 1986, entered the European Economic Community, cold-war issues were not in the foreground

Table 1: Attention paid to single "Western Europe" and "Southern Europe" in the Bibliography of European Economic and Social History (Aldcroft and Roger 1992)

	Approx. number of pages
Western Europe[*]	95
France	42
Germany	38
Belgium	5
The Netherlands	9
Switzerland	2
Southern Europe	19
Italy	8
Spain	6
Turkey	2
Greece	2
Portugal	2
Malta	1

[*] Britain is not included in the analysis as the authors point to another bibliography, i.e. Chaloner and Richardson 1984.

(Preston 1997, 46–86). Rather socio-economic gaps between new and old members of the community were at the center of political debates (Kaiser and Elvert 2005, 75–138). The membership in the European Economic Community—and the preceeding negotiations that led to it—created a climate promoting social scientific research on these countries. While the hunger for studies on Spain, Portugal, and Greece became stronger, the concept of Southern Europe proved helpful in canalizing research. In this context, scholarship tended to identify these countries as an area to be distinguished from the rest of Western Europe. We might describe this tendency as an inclusion by exclusion: Greece, Spain, and Portugal were included into the social-scientific discourse on Europe by conceiving them as a separate group.

Italy was soon associated with that area because of its ambivalent status. In spite of belonging to the European communities from the very beginning and constituting a major industrial economy, the country has not conquered the deep inequalities between Northern and Southern regions, and appears to be in between a European core and its periphery (Demertzis 1997, 203).

By inserting Italy into a broader area, scholars have achieved a clear framework to situate the country within Europe, and at the same time strengthened the concept of Southern Europe. In this way—and in close connection with the political discourse—social sciences have coined a key category which reflects power hierarchies within contemporary Europe.

Discourses and Varieties of Mapping

Italy can serve as an example to illustrate the political implications of regional framing in academic research and public discourse. In its case, however, it would be difficult to find such a clear statement about the dialectics of the discursive construction of space as in the following affirmation by the Croatian writer Predrag Matvejević about another geographical and geopolitical concept used to include the Apennine Peninsula: "The Mediterranean and the discourse on it are inseparable from each other." (Matvejević 2007, 21) This affirmation without a doubt is particularly valid for the Mediterranean as a kind of symbolically overcharged imagined landscape, but it is certainly true also in the case of the Euro-Mediterranean area or, in other words, of the European South as spatial concepts which overlap and are entangled with the Mediterranean region in a larger sense. The fact that, contrary to Central or Eastern Europe, the history of Southern Europe does not exist as an established academic discipline or—with the exceptions discussed above—as a well-defined field of historical research has contributed perhaps to avoiding a critical revision or at least a serious reconsideration of what could be the meanings and consequences of the mental mapping of Southern Europe.

First of all, it seems almost trivial to observe, but has to be stressed that the South is a relational category. The idea of the European South as a historical and cultural region has a long-lasting and twisted history which is closely interrelated with the history of Europe as a physical space and a social and cultural construct. Moreover, its history is linked with that of other parts of Europe, such as Eastern and Southeastern Europe, which since the Age of Enlightenment, together with the South, were destined to become the periphery of a Western 'core' Europe along a double axis, a West-East and a North-South divide, marking a hierarchy of development, progress and power. Furthermore, like other subdivisions of Europe as well as the whole continent itself, the European South is a spatial category with rather

fluid borders, which depend on the point of view of who is referring to it. It seems remarkable that the category of the South is not normally used by 'insiders' as a label for designating one's own origins or expressing one's sense of belonging, but is used by 'outsiders', from the 'West' or the 'North', for a rather wide range of countries and regions, generally including Portugal and Spain, Italy, Greece and sometimes even Turkey, as in the case of Giulio Sapelli's 'Southern Europe' (1995). The views of local people and the view from the outside can here diverge radically. Basques and Tuscans as well as Catalans and Lombards, to give only a few examples, would vehemently contest being labeled as 'Southerners'.

There are also some countries which reproduce the European North-South divide even within their own territory. In Spain it is Andalusia which often represents the quintessential South in images going back to European romanticism (e.g. Hoffmann 1961). In France, which as a whole is definitely not seen as a Southern country, but generally as the very essence of the European West, there is the *Midi* with main characteristics of the European South expressed in the idea of *méridionalité* (Borutta 2013). And in the case of Italy, the construction of a united nation state from the eighteen sixties onward was based on an explicit North-South dichotomy and the 'invention' of the *Mezzogiorno* as a defective and alien, if not hostile part of the body of the nation, a division which still continues to be considered a structural feature of Italian economy, society and politics today (Bevilacqua 2005; Petraccone 2000; Schneider 1998; Soriero 2014).

The spatial blurredness and ambiguous position of the European South is further enhanced by overlapping regional concepts, particularly the Mediterranean, generally reduced to its northern shores from a European point of view. The idea of a 'new Mediterranean' had emerged parallel to the rise of the concept of the European South since the second half 18th century and was in many aspects identical to it (Baumeister, 2015; Giaccaria and Minca 2010, 350–353). As far as the idea of a hegemonic 'West' was concerned, the South as well as the Mediterranean were expressions which, together with the East, were used to define peripheral zones lagging behind the West in its rush to modernity. We can't maintain that the North-South conflict is one of the constants of European history (Lepenies 2013, 11), but this divide certainly plays a significant role in the formation of what can be called a European or Western idea of modernity. The concept of the East from a Western point of view had already been used for a long time to refer to barbarous lands far from civilization and could easily be conflated with the quintessen-

tial European 'Other', Asia. The South, however, since the 18th century underwent a deep re-evaluation or devaluation, from a European core region, defined by its cultural pre-eminence, its economic wealth and political power in the case of Italy and Spain respectively, to a loser region on the borders of Europe, at best with a particular heritage of ancient greatness and splendor. In this tension between a glorious past and current misery, the South, by analogy to or as part of the Mediterranean, assumed a deeply ambivalent position on the reconfigured maps of a new Europe, marked by Orientalism and Classicism (Jirat-Wasiutyńsky 2007). That means on the one hand that this 'new' European South, increasingly marginalized after the shift of political and economic hegemony to the Atlantic West, was conceived in the context of euro-centrism, imperialism and colonialism, beginning with the Anglo-French struggle over the succession of the decaying Ottoman Empire in its former hegemonic position in the Mediterranean world. On the other hand, the South excelled as a unique place of origin by its role as the 'cradle' of Western civilization, located in ancient Greece and Rome, and by the attractions of an Arcadian nature and of artistic treasures as well as of pilgrimage and archaeological sites central to European identity.

While the Mediterranean in academic and public discourse, as expressed in Fernand Braudel's classic historical work, published in a first edition in 1949 (Braudel 1982), was imagined as a physical unity, held together by economic, social, cultural and political bonds, the European South remained a sample of national and regional cases, lacking contiguity and spatial coherence. All of these cases or elements, however, were considered to follow more or less similar dynamics and were associated with a common set of images and value judgements. This set of ideas emerged from what, according to Roberto Dainotto, was a radical shift in the rhetorical discourse of Europe, from an antithetical to a compensatory way of conceiving of the continent as an ethical category. While Europe had defined itself before in antithesis to a hostile 'Other', whether the kingdom of the Persians or the Muslim Orient, now alterity was assimilated by designating an intra-European 'Other', the South—and one might add the East—which in this way became a "symbolic formation of a displaced other", a "compensatory trope for a problematic modernity" (Dainotto 2000, 383, 387; Dainotto 2007). The European South was part of a "moral geography" which opposed the protestant North as the origin of capitalist and industrial modernity to the South as a zone of archaic immobility and backwardness.

After 1945 the political situation changed, however, and triggered another fundamental shift on the European mental maps. The European North-South divide was reduced considerably in the context of the Cold War, decolonization, an increasing European integration, and deep transformations of the Southern European countries from rural into predominantly urban societies, while a larger 'West', in contrast to the East in its hostile isolation behind the Iron Curtain, was absorbing first, post-fascist Italy, and then definitely after the fall of the respective dictatorships, Portugal, Spain and Greece. This change was sanctioned by the admission of the three countries into the European Community in 1981 and 1986, only a few years before things changed again completely after the dissolution of the Eastern bloc. The East-West divide of the Cold War was smoothening, while there was a role reversal between new members of the European Union and their Southern counterparts. Driven by the financial crisis from 2008 onwards, the old North-South divide resurged with new vigour (Ther 2014, 267–276). Even if the infamous PIGS acronym had been coined earlier on during the process of strengthening European integration (Dainotto 2007, 2; Pedaliu, 8) and the dark images of a problem-ridden South had never faded completely, it has been in the last years of a growing questioning of a European basic consensus, that old stereotypes of the contrasts between a virtuous North and a vicious South have appeared again in public debates as well as in political and economic analyses. Northern critics on Southern failure and misery, by re-cycling old stereotypes of a seemingly timeless European 'moral geography', are contested not only by appeals to question and deconstruct these stereotypes, but also by benevolent philo-southerners who answer negative with positive stereotypes, referring to the 'true' good essence of Southern thought and ways of life in contrast to the devastations of a merciless 'Northern' capitalism[6].

It is particularly in this context, where current debates about a 'problematic' South are intermingling and overlapping with the concept of the Mediterranean. Since Braudel's opus magnum, historians dealt with the 'interior sea' predominantly regarding the centuries prior to the French Revolution.

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6 For German examples of presenting a stereotyped South see the cover story including the magazine's polemic cover: Die Armutslüge: Wie Europas Krisenländer ihre Vermögen verstecken. In *Der Spiegel*, nr. 16, 15.4.2013, instrumentalizing negative clichés; from a "philo-southerner" point of view: Max A. Höfer, Siempre la siesta. Südeuropa fühlt sich und die lateinische Lebensart bedroht. Absurd ist das nicht. In *Der Spiegel*, nr. 26, 24.6.2013, 128–129; Schoepp (2014); more nuanced Leggewie (2014).

The last impressive effort to revitalize the conception of the Mediterranean as an historical region beyond Braudel's structuralism has been presented by two British historians, a classicist and a medievalist, for a range of two thousand years, up to the end of the first millennium A.C. (Horden and Purcell 2000). A brilliantly written synthesis for a broader audience by the well known British medievalist David Abulafia covers the widest possible time range from the first human traces up to recent times, but presents more a panoramic view of history *in* the Mediterranean than a coherent analysis of the history *of* the Mediterranean, as expected by his colleagues Peregrine Horden and Nicholas Purcell (Abulafia 2011)[7]. For the history of the last two centuries, exactly the period when a new idea about the Mediterranean, which still continues to be ours, was rising in Europe, the Mediterranean Sea is not much more than a geographic indicator for historians (Borutta and Lemmes 2013). This is also true for the last decades, when the European South has become, as explained above, increasingly an object of research, at least in the social sciences. There are, after all, some cases in research about the era after 1945 where the 'Mediterranean' is used as a synonym for Southern Europe. This is what the Greek geographer Lila Leontidou does. Studying the period of rapid urbanization of Greece, Italy and Spain after World War II, she defines common structural features of what she calls the Mediterranean city. This type of city de facto refers to Southern European cities which she analyzes by distinguishing a Southern European form of urban development from a Northern one (Leontidou 1990).

Just when the transformations in the Euro-Mediterranean region analyzed by Leontidou were occurring, a whole generation of Anglo-Saxon ethnologist chose the 'interior sea' as their favourite area of research, shifting their fieldwork in the context of decolonization from overseas to circum Mediterranean regions. These scholars did not focus their attention on the rapidly expanding, continuously changing cities, but studied the Mediterranean as an essentially rural, archaic world, a sample of seemingly isolated village communities and small towns characterized by a value system of honor and shame, by "amoral familism" and patron-client relationships as the dominant mode of social integration (e.g. Davis 1977). Parallel to the Southern enlargement of the European Community in the eighties, anthropologists increasingly reduced their focus from a perspective encompassing the whole

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7 This distinction between a history *of* from a history *in* the Mediterranean is made by Horden and Purcell 2000, 9 and passim.

Mediterranean region with its Northern, Southern and Eastern shores to simply Southern Europe (Driessen 2011). At the same time, however, in this relatively new academic discipline which conceived of the Mediterranean as a 'culture area', characterized by common social structures and values in open contrast to North-Western European modernity (Ben-Yehoyada 2014), a fundamental critique of using this spatial concept as an analytical paradigm arose, not because of its territorial reductionism, but more generally because of its basic legitimacy. Critics maintained that the Sea in Mediterranean studies, instead of being a physical reality, was a mere intellectual construction, deformed by its ideological content and political bias, informed, among other things, by colonialism and euro centrism (e.g. Horden and Purcell 2006, 725). Criticism culminated in the charge of 'Mediterraneanism', a term coined in analogy with 'Orientalism', as a form of essentializing, exoticizing and homogenizing of a culture area (Herzfeld 1984; 1987).

Certainly, many of the negative stereotypes targeted in discussions about Mediterraneanism are being revitalized in current debates about Southern vices and defects. There is, however, another type of Southern essentialism based on the older dialectic relationship of putting down the European South while at the same time emphasising its excellent qualities and values. This kind of Mediterraneanism positively spilled over into international media, when the philosopher Giorgio Agamben, in March 2013, published a polemic essay in Italian, quickly translated into other languages, calling for the creation of a "Latin empire" against the hegemony of nefarious Northern Protestant capitalism (Agamben 2013). A group of scholars, living and working mainly in Italy and France, among them most prominently the sociologist Franco Cassano, claim that what they call the 'South', a rather abstract Mediterranean region with an unmistakable European flavor, constitutes a physical, social and cultural reality, an "anchorage for a big common fatherland, a root of stone and sea which is stronger than the diversity, of that drift of continents, religions and ethnic pride from which incessantly arises the integralist temptation" (Cassano in Goffredo 2000, 19). They defend the diversity and peculiarity of the 'South', against the 'North Western' perspective, which considers it as its negative counterpart, as a deficient, pathological modernity, "the disease of the world" (Cassano 2001, 1). According to this "militant Mediterraneanism" (Giaccaria and Minca 2010, 355), the 'South' is more than a mere projection, more than a Northern invention. It is a subject of its own which must, however, "re-conquer its own outlook" and "learn to view itself independently" in open contrast with the 'North' (Cassano 2001,

2). Cassano and his peers turn 'classical' Mediterraneanism upside down and call for "re-attributing to the Mediterranean the role of a new center, a paradoxical center, because it is situated on the borderline" (Cassano 2001, 7). The essence of this 'South' is 'Southern thought' which is characterized by its rejection of all kinds of fundamentalism and hegemonic universalism, by its insistence on "slow time" against capitalist acceleration and its profound "sense of measure" (Cassano 2011; Fogu 2010, 14). For militant Mediterraneanists the "smaller" South, the Italian *Mezzogiorno,* Southern Europe and the Mediterranean, are closely connected with all other Souths of the world (Cassano 2011, IX), that is to say that for them *il sud* is part of the 'global South'.

The advocates of 'Southern thought' argue against a hegemonic 'Northern' project of modernity and progress, where terms as "the modern Mediterranean" and "Mediterranean modernity" appear "debatable if not outright oxymoronic" (Ben-Yehoyada 2014, 107). Cassano and his followers, in contrast, interpret the 'South' as including the Mediterranean, as "an invaluable source of inspiration for the experience of 'alternative modernities'" (Giaccaria and Minca 2010, 346). The anthropologist and sociologist Iain Chambers sees Naples, a quintessential 'Southern', Mediterranean city, as a configuration of a modern life of its own, as the opposite to the "modern myth of the rational organization of urban space, production, labor and profit" which in this city "continues to be interrupted, decomposed, and deviated by innumerable pockets of social resistance, mercantilism, barter, corruption, and crime" (Chambers 2008, 74, 73). For him, the city under the volcano is the expression of a "porous modernity", capable of soaking up external elements, of embodying and incorporating foreign elements and external pressures while maintaining its initial form:

"Naples proposes an interruption and interrogation of our inherited understanding of urban life, architecture and planning. Participating in progress without being fully absorbed in its agenda, Naples, as a composite space, reintroduces the uneven and the unplanned, the contingent, the historical." (Chambers 2008, 81)

Chambers presents Italy in its ambiguous position between 'modern West' and the 'South' as a case of a "composite modernity", not as a late-comer, but as a country between 'North' and 'South' with its own, diverse trajectory to European modernity (Chambers 2010, 3). Accordingly, in a critical distance to normative teleological concepts of modernity and modernization, some scholars refer to Shmuel N. Eisenstadt's notion of "multiple modernities" in

order to tackle the contradictory realities and developments of Southern Europe or, in a wider sense, of the circum-Mediterranean cultures (Welz 2004).

Beyond Discourses?

Debates about 'modernity' and 'modernization' have been at the origins of conceiving of the 'European South' as a region characterized by common structures and dynamics of development in the post-war era. The concept of 'Southern Europe' is closely connected with the idea that those countries have followed a special path to modernity, i.e. that they are supposed to have achieved only an incomplete modernization in comparison with Europe's 'core'. These arguments about the peculiarities of the 'South' have a different historical depth. While disciplines such as economics, sociology, and political science look at Southern Europe from a short-term perspective, by referring to assumed long-term special features, there are some attempts by historians to explain a particular Southern European path to modernity in a long-term view, going back to the caesuras of the French Revolution and the Napoleonic era. Stanley Payne, in his assessment of "common dilemmas of economic development or social structure and change" of Southern European countries, considered two periods of "maximum convergence" in contemporary history, "between about 1860 and 1915, when structures and sequences were most clearly parallel to each other" and again since 1975, "when Spain, Portugal and Greece all joined Italy once more in the ranks of democracy while pursuing somewhat similar policies of social democracy and more rapid modernization within the EEC and the Nato alliance" (Payne 1986, 115). Edward Malefakis, while using metaphors of trauma and pathology,[8] shares Payne's *longue durée* approach and his interpretation of the two last centuries of the history of Southern European countries as an arduous way to modernity, crowned by a positive final outcome. Southern Europe, according to his interpretation, at the beginning of the 19th century, belonged fully to the Western mainstream only in its aspirations: "A beginning had been made toward political modernization, but it was a traumatic beginning, one

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8 For metaphors of a defective South, more concretely European Southwest, comprising Italy, Portugal, and Spain, in moral terms see Tortella (1994, 4), who in order to investigate its "common political and economic sins" wants "to study what was wrong with the bodies and the souls of our Latin countries".

that left deep wounds which would affect Southern Europe's further evolution" (Malefakis 1992, 19). For Malefakis, the "decades from the 1790s to the 1870s witnessed the agonizing birth of a new and seriously deformed Southern Europe" (1995, 76). The "curse of Southern Europe" (1992, 35), of a delayed, if not failed catch up with Western Europe could be lifted only in the quarter-century between 1950 and 1975, due to a unique mix of external and domestic factors, when the region "witnessed an astonishing reinvigoration […] which carried it well beyond the thresholds of sickness around which it had hovered for the preceding two centuries and one which seemed to assure it a more or less normal future" (1995, 76).

In historical analyses concentrating on the post-war development of Southern Europe we find key elements of Payne's and Malefakis's arguments regarding "normalization", i.e. "Europeanization" and the catching up of Southern Europe, pushed along by 'Western' influence since the fifties. At first look, however, there seem to be considerable differences between such works as those by Giulio Sapelli (1995) and Tony Judt (2005 [2011]). While Sapelli is mostly committed to economic and social history, Judt argues rather from the point of view of political history. Adopting a Weberian perspective, Sapelli analyzes Southern Europe as an area split up between tradition and modernity. By linking up economic, social and political developments, he identifies the common features that, in his opinion, shape Southern European countries, like for instance, a weak industrialization (63–90) and a clientelistic political culture (114–122). Enhancing the persistence of traditional structures, Sapelli points to the deficits affecting Southern Europe, i.e. its incomplete modernization (10–13). From a quite different point of view, Judt focuses on Southern European dictatorships and their position within Europe. He underlines that Spain, Portugal and Greece were integrated into the so-called Western block long before the dictatorships collapsed. Only on this basis, in his eyes, modernization and economic development accelerated when they joined the Economic European Community and received significant financial as well as political stimuli. According to Judt, writing in 2005, between the sixties and the nineties these countries had thus got through an enormous catching up process, and achieved a social and economic standard not far from that of continental Europe (Judt 2005 [2011], 516–529).

The authors' different approaches apparently lead to almost opposite results. Inspired by the ideal types of Western modernity, Sapelli enhances economic and social structures. From this perspective, Southern Europe appears as an area affected by multiple deficits, unable to get over the gaps separating

it from the European core. On the contrary, Judt looks primarily at politics, i.e. he regards economic and social developments as a result of the geopolitical framework. He believes that the Spanish, Portuguese, and Greek societies and economies could catch up to those of other European countries especially thanks to the political integration within Western Europe. While Sapelli focuses on the persistence of differences, Judt emphasizes integration processes. Paradoxically, both perspectives can be combined. Placing sharp boundaries on Western Europe, the geopolitical context of the Cold War and European integration significantly influenced the economic and social development of those countries. As they had to belong to the capitalist societies politically, their integration into the 'Western' economies constituted an important policy issue within international relations—this applies also to Italy and its regions affected by economic underdevelopment (Bouchard and Ferme 2013, 5). In that context, moreover, Greece had been virtually included in the West: until the present day, it is generally said to belong to Southern Europe, i.e. *Southwestern Europe*, and not to Southeastern Europe, in spite of having close cultural, geographical and historical linkages to the other Balkan countries (Augustinos 2003).

With its unsteady pace, the European integration process has indeed deeply shaped the notion of Southern Europe both in the political and academic discourse. As it joined the 'West' and the European Union only after the end of the Cold War, a country like Bulgaria is usually not numbered among the Southern European states. On the contrary, some scholars—such as Giulio Sapelli (1995)—do regard Turkey as part of Southern Europe. This results from the country's political "Westernization" and "Europeanization" since the fifties (Müftüler-Bac 1997)[9], that—in spite of not having led to a full membership in the European Union—keeps on raising the normative question of Turkey's place within Europe or, in other words, between "tradition and modernity" (Kramer 2000, 11–23). Suggesting—as underlined above—both inclusion and exclusion, Southern Europe expresses the country's ambivalent position within the European hierarchy.

Within that transnational space, however, socio-economic development has gone beyond the integrative dynamic that resulted from the geopolitical order. The interconnectivity characterizing Western Europe has depended

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9 For similar reasons, also Cyprus and Malta—which, in spite of having joined the European Union not until the beginning of the 21st century, belonged to the "Western block" within the post-war order—are often mentioned as Southern European countries (Verney 2011).

not only on similarities, but also and especially on different levels of social and economic structures. By focusing on this aspect, the question of whether 'Southern European' countries have shared common paths becomes sharper. A valuable example in dealing with inner European interdependence dynamics is international labor migration. Between the fifties and the seventies, millions of labor migrants left Italy, Spain, Portugal, and Greece: "labour migrations divided Europe into a northern in-migration region and a southern out-migration regions" (Bade 2003, 219). Within a short time, they all developed from emigration to immigration countries, sharing as such quite similar features (Reyneri and Baganha 2001). From this perspective, it seems hardly possible to neglect a Southern European path as regards international migration (King et al. 2000).

By broadening the perspective, however, the existence of a "Southern European migration system" (Mau and Verwiebe 2010) appears less evident. With Thomas Hammar (1985, 3), for instance, we can describe post-war labor migration until the seventies, instead of a movement from south to north, as one from the periphery to the center (see Map 1). Hereby, we can observe that Ireland and Finland were subject to mass emigration to more industrialized areas. Moreover, besides to some extent northern African countries, Turkey and Yugoslavia participated significantly in that phenomenon. Migration flows from Italy, Spain, Portugal, and Greece thus have to be inserted into the broader context of post-war labor mobility that concerned both other Western European countries as well as those only partially integrated into the capitalist bloc. Among them, several ones turned into immigration areas.

Starting from processes such as migration, it makes sense to adopt a center-periphery perspective[10], as it has been developed particularly by political economists with regard to the interdependence among more and less advanced capitalist societies (Arrighi 1985). This approach can help to solve a main dilemma concerning the concept of Southern Europe, i.e. the danger of interpreting common dynamics in terms of an area sharing all paths of development. In his social history of Europe in the second half of the 20th century, historian Hartmut Kaelble (2013) offers a good example of this approach, referring to the interplay between a 'rich center' and 'poor periphery' as the analytical framework of his book. This applies to the relation between Western and Eastern European countries on the one hand, and to the inter-

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10 See the chapter by Russell King in this volume.

action between more and less developed regions within Western Europe on the other. In Kaelble's opinion, after the Second World War, countries both in the North—Finland and Ireland—and in the South—Italy, Spain, Portugal and Greece—belonged to a scarcely industrialized Western European periphery. From this perspective, he reconstructs various analogies that have shaped the recent past of these states as regards different fields such as education, migration, urbanization, labor, welfare, secularization, civil society, and consumption. Kaelble, however, is far from depicting this 'periphery' as a homogenous space. He rather looks at the convergence dynamics that, triggered by Europe's economic and social (as well as political) integration, have involved several countries, but with different rhythms and partly different results. In his book, whose first edition was published in 2007, shortly before the financial crisis, he observes that at the beginning of the 21ˢᵗ century Finland, Ireland, and (as a whole) Italy had fully achieved the social and economic standards of the European 'core', while Spain, Portugal, and Greece—similarly to Slovenia, Estonia and Latvia—were still, but rapidly catching up.

Map 1: Schematic representation of post-war labor migration, 1950–1973

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As employed by Kaelble, the center-periphery perspective bears the danger of conceiving monolithic areas, leading to exhaustive interpretative models as well as introducing by the backdoor normative conjectures we see in the modernization paradigms used by scholars such as Payne, Malefakis or Sapelli. This risk can be avoided if we consider the interrelation between more or less 'advanced' European economies and societies as one (mighty) dynamic that interacts, however, with more specific national, regional, and transnational configurations. In other words, we can look for analogies characterizing certain groups of countries in different fields without assuming the existence of one unique path of development.

With these 'precautions', the center-periphery perspective can contribute to pondering the several similarities shared by Italy, Spain, Portugal, and Greece, independently from the fact of whether we define them as 'Southern Europe' or not. As concerns the welfare state, for instance[11], we can observe that these countries' social policies had to face similar challenges without hiding the important differences that—due to specific national settings—partly led to divergent solutions. From this point of view, the general interpretations of Southern Europe's recent past and present proposed by Edward Malefakis and Giulio Sapelli should be revisited by eliminating their Weberian all-encompassing pretensions and re-scaling them according to the respective research agenda.

Conclusions

The idea of the European South as a cultural and historical region is deeply rooted in the continent's 'moral geography'. It cannot be detached as an 'objective' autonomous physical-cultural entity from processes of mental mapping which, in addition, up to now have undergone profound shifts and reconfigurations influenced by changing geopolitical situations. In the decades after 1945, dominant factors have been the Cold War, European Integration, the (supposed) end of the East-West-confrontation, and recently, the financial and economic crisis. The Cold War and the great transformation of 'Southern' countries starting in the fifties after the turmoil of the Second

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11 See the chapters by Claude Martin and Martin Rhodes in this volume for an exhaustive analysis of the debate on a Southern European model of welfare state.

World War had contributed to forging a 'new South' as an integral part of the 'West'. The formation of the European community, democratic consolidation and the socio-economic catching-up process gave new visibility to the 'South' as a model of successful development and a reliable European partner, which in the nineties appeared even more dynamic and promising than problem-ridden, unified Germany. After 2007, however, the ghost of a 'bad South' re-emerged and with it a whole bundle of seemingly old outdated stereotypes of Southern sins and failures.

The 'South' as a geographical unit dealt with in social sciences and history is not independent from these shifting constellations and political trends. Academic interests and perspectives are rather clearly interrelated with them and are imbued with assumptions and value judgments deriving immediately from the discursive construction of the region. We can observe this dependency in central paradigms used with regard to the changing destinies of Southern European countries such as progress and backwardness or modernity and modernization. Revisiting, or better, relocating the 'South' in this perspective means to deconstruct highly normative assessments, often expressed in a moralizing or medical language, of sins and pathologies. It is not appropriate to narrate recent developments of the European South as a 'long road West'—as imagined for Germany by Heinrich August Winkler (2006–2007)— with the final menace of breaking away from it. It might be legitimate and useful to reconstruct the history of the 'South' as a literary-artistic idea (Richter 2009)—an attempt which, notwithstanding all the differences in approach and scope, has some parallels with Winkler's highly ambitious monumental study of the history of the 'West' as a political-cultural project unfolding from Greco-Roman antiquity up to our present (Winkler 2009–2015). At the same time, however, it is necessary to review critically a spatial category which is transformed too easily into rather abstract ideas and principles. In this way, it might be possible to overcome the impasse between 'constructivists' and 'deconstructivists' as manifest in the Todorova-Sundhaussen controversy we mentioned initally. Studying the 'South' on the mental maps might be an important task for understanding internal hierarchies, power relations and the logics of defining 'core' and 'periphery' in Europe, but a critical re-evaluation of this category could also be a first step in reconsidering the 'South' as a research agenda without falling into the trap, inherent in every concept of a historical region, of essentialization, homogenization and teleological determinism.

With this in mind, one can start again from the rich agenda developed by social sciences studying 'Southern Europe' as a composite region with common political, economic and cultural convergences and structures. This approach has been particularly fruitful for the analysis of periods of profound transformations in these respective countries, looking at dynamic processes more than at apparently immutable, timeless structures. The 'European South', however, may not serve only as a sample of cases for this kind of comparative study. The 'South' is also an essentially relational category, both in a European and an extra-European perspective. This becomes evident also in recent developments. Under the impact of the financial and economic crisis, the 'South' is being considered a 'new East' (Ther 2014, 253–264). Many recent EU member states in Eastern and Central Eastern Europe seem to be recovering more successfully from the effects of the crisis than their Southern counterparts, which are dropped back to levels of the early sixties when the process of economic and social convergence was starting. An imbalance, already perceptible before 2007, is currently aggravated by the effects of the crisis, as one can deduce from statistics concerning public debts, (youth) unemployment, increasing regional disparities and declining spending power. Growing prosperity of most of the new EU members and economic decline in the 'South' have caused a role reversal when politicians and economic experts praise Eastern and Central Eastern countries for their economic "successes" in the context of a globalizing neoliberal order while blaming the economies of Southern PIGS. These are serious indications of a deep re-configuration of European mental maps. (Ther 2014, 267–276).

At the same time, the 'South' in its Mediterranean extension has a strong transregional and even intercontinental dimension, passing European borders. There has always been a certain overlapping of the two distinct concepts of the Euro-Mediterranean and an all-encompassing circum-Mediterranean region. In the current geopolitical situation, when hundreds of thousands of refugees are trying desperately to cross the Sea and fears of international terrorism are spreading, the idea of the Mediterranean as a zone of connectivity, of contact and struggle reemerges, gaining, however, new meanings, in many ways opposite to the values of peace, security and prosperity proclaimed in the so-called Barcelona declaration of 1995 which was intended to create a new Euro-Mediterranean partnership (European Union. External Action n.d.; Euro-Mediterranean Conference 1995).

The current crises with their global backgrounds and dynamics show clearly how 'Southern Europe' is not only a testing ground for the future of

Europe, but also for understanding its past and present, as its borders, internal hierarchies, the relations between 'core' and 'periphery' and its political and cultural identity are concerned. Looking at the 'South' one can reevaluate Europe's mental maps, one can discuss basic assumptions about the development of European societies in a comparative perspective, and one can contextualize Europe in broader settings and relationships. That is why it is worth the effort to reconsider and relocate the 'South' beyond familiar stereotypes and preconceived expectations.

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