

Introduction

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In 2004, *The Economist* published, under the title “The Fit and the Flabby”, a cartoon depicting three men in underpants.¹ The man at the center was remarkably obese and wore drawers in the colors of the German flag. At his sides, two slender bodybuilders—whose briefs had the colors of Spain and France—exhibited their fully oversized muscles. The message was clear. At that time, Germany was considered the ‘sick man of Europe’, as a country “facing its most serious stagnation in postwar history” (Hein and Truger, 2005). France, its traditional main concurrent, appeared to be in much better shape. The novelty was, however, the third counterpart: as Europe’s new ‘top performer’, Spain appeared to match the two major economies of the continent. The Spanish economy represented a model envied by many that since the seventies had successfully managed the “transition from an agricultural society to a modern economy dominated by the service sector” (Mas and Quesada 2007, 87).

After the outbreak of the financial, the economic and eventually the debt crisis, a few years later the situation has fully changed. Not least thanks to its broad industrial sector, previously considered its weak spot, Germany has resurged and mutated from “Sick Man of Europe to Economic Superstar” (Dustman et al. 2014) while France has been hit by severe economic and social problems. Of the three, however, the main loser has been Spain, falling down from the economic miracle to a dramatic recession that has deeply affected the Spanish society as well as the cohesiveness of the European Union.

The rise and decline of Spain is paradigmatic for the area that—including also Italy, Portugal, and Greece—is usually called ‘Southern Europe’ in today’s political and scientific discourse. Before the crisis, the international reputation of these countries was quite different. In comparison with other Western European states, Portugal and Greece were still regarded as less dy-

1 Anonymous (18/09/2004). The Fit and the Flabby. *The Economist*, 8393, 93–94.

namic economies that, nonetheless, were achieving remarkable results. On the contrary, Italy was said to be a country affected by stagnation and still living off the economic boom of the past. Nevertheless, all four Southern European countries were considered an integral part of the wealthy (Western) European economies. Also by leaving behind the past authoritarian regimes, they seemed to have mastered the deep economic underdevelopment still affecting them after World War II and become solid democracies and reliable members of the Western community.

After 2007 and especially 2010, the South has been at the center of public debates over the crisis. Although Ireland—as regards the debt crisis the second ‘I’ of the *PIIGS*—and partly France have shared common problems with these countries, it is undisputed that ‘Southern Europe’ constitutes ‘the’ European problem. In other words—as far as their economic and social emergencies are concerned—the near future of Italy, Spain, Portugal, and Greece appears to be decisive for the success or failure of the European integration project.

This book addresses the question of whether ‘Southern Europe’ is a useful concept for understanding the European present and recent past. Do Italy, Spain, Portugal, and Greece represent an area shaped by common paths and patterns of development as well as structural analogies? Or is ‘Southern Europe’ a misleading notion brought up by polarized political debates? From this perspective, following an interdisciplinary approach, the volume looks both at the current situation and considers its historical roots, back in the early post-war period.

While historiography has not dealt intensively with ‘Southern Europe’, in the last decades, disciplines such as economics, sociology, and political science have offered in-depth analyses of Italy, Spain, Portugal, and Greece in terms of a common area of development. A recurrent characteristic of these studies consists of highlighting the supposed deficits of ‘Southern Europe’ with regard to a European ‘core’. A good example is a passage that Maurizio Ferrera—a renowned expert in the field of welfare state studies—wrote in 1996 and that retrospectively appears almost prophetic:

“Within national debates, some voices have started to lament explicitly that perhaps the ‘deeper and wider’ European Union has arrived too early for the new southern Europe, which is therefore doomed to remain a second rate periphery. Others argue that the constraints posed by the integration process represent a good chance for a ‘big’ modernising ‘bang’, capable of finally aligning the still underdeveloped Medi-

terranean littoral with the more civilized European inland. The next decade is very likely to show which scenario will prevail.” (Ferrera 1996, 34)

Even regarding the more technical aspects of his analysis of a Southern European welfare state, Ferrera focuses on insufficiencies of his ‘Southern model’, whose characteristics are its dualism, ineffectiveness, and particularistic clientelism, producing its permanent structural crisis (Ferrera 1996, 19, 25, 31). This tendency becomes especially evident in the *opus magnum* by Giulio Sapelli (1995)—one of the few historians dealing with this field—dedicated to the post-war history of Italy, Spain, Portugal, and Greece (as well as Turkey, which the author considers to be part of that area).² Adopting a Weberian perspective and examining both the economic and socio-political systems, Sapelli describes ‘Southern Europe’ as an area floating between *tradition* and *modernity*, i.e. as a region that—caught in archaic structures—has only partially achieved the features of a modern society. This development, in his opinion, is due to the fact that Southern European societies have experienced only a weak industrialization, changing almost directly from agricultural to service economies. Under these circumstances, the ‘contractual system’ and the ‘market forces’ shaping modern societies have not been able to develop fully. On the contrary, they have been slowed down by clientelistic and patronage structures both in economy and politics.

Without blaming their specific arguments, we can observe that Sapelli and Ferrera—like many other authors in the field—adopt a research framework dependant upon the normative narratives about the right or wrong path to European modernity. From this perspective, the volume is based on the assumption that both political debates and scientific research on ‘Southern Europe’ have been influenced by polarizing discourses reflecting internal European power hierarchies. To contextualize and historicize these discourses, however, does not mean rejecting the concept of ‘Southern Europe’ as a whole. It rather implies the necessity of identifying the danger of ‘all-inclusive’ interpretative paradigms, and of raising the question of to what extent this regional concept helps to understand Europe’s present and recent past.

² There are scholars who like Sapelli consider Turkey—as well as, in a similar logic, Cyprus—a part of ‘Southern Europe’ due to its reinforced ‘Westernization’ and ‘Europeanization’ in the post-war era. In this volume Turkey is largely left out of our discussion of the ‘European South’ according to the perspective of a good deal of research and the country’s rather ambivalent position in political discourses about the mapping of Europe.

The volume consists of four sections. The *first section*, ‘Southern Models?’, surveys debates of the last three decades regarding the existence of ‘Southern Europe’ as an analytical category. In their chapter, *Martin Baumeister* and *Roberto Sala* examine the career and the potential of ‘Southern Europe’ as research agenda. They show that this concept is relatively young both in political and scientific discourses when referring to Italy, Spain, Portugal, and Greece. This category, as they show, almost ignored by historiography, has been increasingly employed since the seventies—in the specific context of the European integration as well as the Cold War and its aftermath—by social scientific studies. Although quite recent in its current use, the category of ‘Southern Europe’ has absorbed long-term normative discourses about the European South, especially those related to the idea of the ‘Mediterranean’. *Baumeister* and *Sala* argue that both short- and long-term narratives underpinning the mental mapping of ‘Southern Europe’, rather than ignored, have to be examined as an expression of the economic, political and social structures. As an analytical tool to investigate the present and recent past, ‘Southern Europe’ has to focus on the relation of Italy, Spain, Portugal, and Greece with other parts of Europe. In this context, they see a potential useful framework in the ‘center-periphery’ perspective as it allows them to conceptualize structures of interdependence within Europe.

In his chapter, *Martin Rhodes* traces the concept as used in different perspectives and approaches since the eighties: firstly in international political economy, via world system theory (and its political-cultural variants), in which the area is located in the ‘semi-periphery’; and secondly in comparative politics and political economy, where models of a Southern European ‘variety of capitalism’, or of a Southern European ‘welfare state’ have been proposed, sometimes as heuristic devices but also as empirical realities. *Rhodes* raises the question whether these theories and models can be useful for empirical analysis as well as for overcoming the theoretical inadequacy of historic-development approaches on Southern Europe, or whether they obfuscate as much as they reveal. The article also considers Italy, Spain, Portugal, and Greece in light of the recent financial crisis, and whether the causes and consequences of the crisis reveal similarities or deep contrasts across the region.

Focusing on a key sector of comparative research, *Claude Martin* analyzes the specific welfare regime that—in the opinion of many scholars—has shaped Italy, Spain, Portugal, and Greece. As he points out, in the nineties the existence of such a regime played a significant role within the discus-

sion on Gøsta Esping-Andersen's three welfare state models (Esping-Andersen 1990). While some authors emphasized the specificities of those countries up to the point of building a fourth model, a 'southern ideal-type' beside the continental, liberal and universalist ones, others considered the southern configuration as a late development of a continental regime. *Martin* shows that this debate is still of great importance in spite of—or perhaps because of—the fact that the financial and debt crisis has deeply challenged the welfare state structures. He highlights the heuristic relevance of one characteristic attributed to the 'southern configuration', i.e. the central role of the family as a source of protection against risks and vulnerability. Examining family and gender structures can help to understand processes of change and the resilience capacity of the welfare systems, both in 'Southern Europe' and in many additional countries.

The *second section*, 'A European periphery?', adopts the center-periphery analytical framework as regards as the economic as well as socio-economic embedment of Italy, Spain, Portugal, and Greece within Europe. To analyze the interconnection of Western European industrial economies, *Annamaria Simonazzi* and *Andrea Ginzburg* define the 'center' as the first-comer industrializers (i.e. Germany and France) and the 'periphery' as the late-comers (Italy) or late-late-comers (Spain, Portugal, Greece). As they argue, most studies have regarded these clusters as two separate units without examining in depth the relations between 'core' and 'peripheral' countries. From their point of view, the analysis of center-periphery relations is crucial in evaluating the integration of European economies as well as their position within globalization processes in the last decades. In their opinion, the deep crisis that has hit the Southern European economies since 2007 cannot be understood without considering long-term roots to be traced back to the seventies on the one hand and the effects of economic policies promoted by the European partners, especially Germany, on the other. Simonazzi and Ginzburg show that catching-up processes of Italy, Spain, Portugal, and Greece have been less sustainable than commonly assumed as these countries were affected by an 'interrupted industrialization'.

As *Russel King* shows in his chapter, also migration movements from and to contemporary Italy, Spain, Portugal, and Greece give evidence of center-periphery dynamics. He distinguishes three main phases in post-war Europe. Firstly, King points to the impressive labor migration to countries such as Germany, France, and Switzerland; in the decades after the war, these flows involved millions of migrants from Southern Europe and resulted from its

peripheral condition in comparison to the more advanced European industrial economies. Secondly, he looks at the transformation from mass emigration to immigration countries that shaped Southern Europe between the seventies and the nineties; due to flows from Asia, Africa, South America and Eastern Europe, Southern Europe became a 'semi-periphery' within global migration. Finally, King underlines that after the beginning of the economic crisis, Italian, Spanish, Portuguese, and Greece migrants are increasingly seeking job opportunities in the 'North'. Although they differ quantitatively and qualitatively from those in the past, these new flows are proof that center-periphery interdependencies within Europe are far from being overcome.

The *third section*, 'Modernity and other master narratives', looks in depth at discourses on the South. *Wolfgang Knöbl* illustrates that, against the background of the US-American cultural dominance after World War II, modernization theory significantly influenced sociological and anthropological analyses of single 'Southern European' countries, in particular Spain and Italy. On the one hand, these studies enhanced the persistence of archaic structures that would, for instance, affect political culture, on the other, they emphasized that those societies were experiencing modernization processes. As Knöbl shows, in the context of these studies, scholars developed a theoretical repertoire that, based on the diagnosis of a special path to modernity, has led to the concept of 'Southern Europe'.

In her chapter, *Patricia Hertel* emphasizes that there are not one, but different discursive connotations of 'Southern Europe'; although interwoven, these various narratives must be regarded in their peculiarity. As she shows, the 'backwardness discourse', which emerged in the 18th and 19th centuries, deeply shaped the transnational perception of 'Southern Europe' in the second half of the 20th century. By exoticizing those countries, France, Germany, or Great Britain could virtually consolidate their supremacy. However, cultural elites in the 'North' did not have the monopoly when it comes to employing the 'South' as a discursive device. On the one hand, in Italy as well as, to some extent, in Spain and Portugal, narratives of backwardness have emerged towards their own, economically weaker Southern regions. On the other hand, in the post-war period 'Southern European' countries had to renegotiate their discursive position towards Europe and the world. As Hertel analyzes with regard to Portugal, by relocating itself in Europe's South, the country could virtually compensate for the loss of power in the Atlantic sphere. Finally, she looks at the 'overshadowing' of the South in the context of the Cold War: due to the East-West divide, within Western Europe the

differences between the 'South' and the 'North' remained in the background of public and political discourses, as shown through, for example, the little attention paid by international historiography towards 'Southern Europe'.

The *fourth section*, 'Political entanglements' raises the question as to what extent the concept of 'Southern Europe' has been shaped by international politics. As *Guido Franzinetti* illustrates, in the context of international relations, the tendency to perceive Italy, Spain, Portugal, and Greece (as well as, partly, Turkey) as a common area was an indirect consequence of Cold War and European Integration. The geopolitical upheavals leading to the formation of the 'Southern Flank' of NATO determined that Greece and Turkey were virtually absorbed into Western Europe, together with Italy that—in spite of being a founding member of the EEC and, at least formally, a stable democracy—had a precarious position in geopolitical terms. At the same time, after Spain had overcome the international isolation of the immediate post-war years, also the Iberian dictatorships began to be attracted by the Western sphere of influence. Against this background, due both to the progressive integration and the structural peripheral position in Western Europe of Greece and Italy on the one hand, and Spain and Portugal on the other, in the medium-term were perceived as parts of 'Southern Europe'. *Franzinetti* underlines that this way of thinking played an important role for democratization processes in Spain, Portugal, and Greece that, eventually, led to their admission into the European communities. As he shows, in the first years of the millennium, however, the concept of 'Southern Europe' partly lost importance: the end of the Cold War in the medium-term had caused a significant political instability in Italy and Greece, while Spain and Portugal continued to consolidate their reputation as solid democracies. It is after the beginning of the crisis that 'Southern Europe' became again a strong framework to locate these four countries within international relations.

In his chapter, *Massimo Piermattei* focuses on the specific interplay between 'Southern Europe' and European Integration. As he shows, the idea of 'Southern Europe' as a common area including the four countries under analysis constituted a conceptual framework closely connected with the expansion of the European communities and, eventually, the European Union. However, he argues, this concept was not simply a positive, undisputed reference resulting from the Southern enlargement. At the turn between the 20th and 21st centuries, alternative macro-regional concepts of Europe's South were also employed by other 'Southern' countries excluded from the Union and aspiring to become its members. Moreover, long before the debt crisis,

‘Southern Europe’ could be used as a negative reference within the conflicts between members states, as the negotiations for the monetary union in the nineties show.

The contributions of this book illustrate that indeed it can be useful to look at Italy, Spain, Portugal, and Greece from a common perspective—under three conditions. Firstly, it must be recognized that ‘Southern Europe’ has become a category that plays a decisive role within the struggles for resources between European countries. To employ it as an analytical framework, it is necessary to filter normative assumptions deriving from political and social discourses. Secondly, it is not enough to stigmatize and deconstruct these discourses as mere expressions of power hierarchies; they must be examined in depth as they are part of the European integration (or dis-integration) process. Thirdly, Southern European countries cannot be regarded as an isolated area; they rather must be examined with regard to their interconnection with Europe as a whole as well as to their position within global developments. Moreover, it makes sense to look at ‘Southern Europe’ as a common space to investigate several social, economic, and political processes as far as their present and recent past is concerned, without falling, however, into the traps of homogenization, essentialization, or determinism.

The analysis of Southern Europe can contribute to important theoretical and empirical achievements. Helping develop a differentiated approach towards (Western) European contemporary history, it shows not least that Europe cannot be regarded as a monolithic area within the globalization processes of the 20th and early 21st centuries. The category of ‘Southern Europe’ can serve as a useful agenda for comparative research, as a framework to discuss processes of negotiating, defining, and mediating relations of ‘center’ and ‘periphery’ in the continent. And it can also serve to contextualize Europe in wider settings and relationships.

As we are concluding the manuscript of this volume, negotiations about the Greek public debt are coming to their end. It is said that their success, or their failure, will decide whether Greece will continue to be part of the Eurozone, or be forced to leave it (as well as perhaps even the European Union). The ‘Grexit’ is much feared as it could initiate a chain reaction and provoke the contagion of other Southern European countries. Against the background of these dramatic upheavals, tense relations between ‘South’ and ‘North’ appear of no less importance than the emergence of a new ‘East’-‘West’-confrontation—which after the beginning of the crisis in the Ukraine might lead to a ‘new cold war’. From this perspective, while apparently out-

dated mental maps are resurging from their graves to reflect on the 'South' plays a key role when it comes to understand Europe's recent history and its present.

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