

## WHERE IS SOUTHERN EUROPE?

by James Wickham

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The book *‘Southern Europe?’* considers how Southern Europe has been conceptualised within contemporary history and social science. There were four ‘PIGS’ (Portugal, Italy, Greece, Spain) but the bailout crisis involved five countries – the fifth PIGS was Ireland. Like its four companions, Ireland has been seen as a modernising society, as a part of peripheral Europe, and even stereotyped as inefficient and exotic. Including Ireland in the discussion enables us to begin to disentangle social processes from more geographical or spatial issues.

Il volume *“Southern Europe?”* analizza l’elaborazione del concetto di “Europa meridionale” nella storia contemporanea e nella scienza sociale. Quattro erano i Paesi cosiddetti “PIGS” (Portogallo, Italia, Grecia e Spagna); la crisi generata dal salvataggio delle banche ne ha però coinvolto un quinto: l’Irlanda. Al pari degli altri quattro, l’Irlanda è stata vista come una società in via di modernizzazione, parte di un’Europa periferica, ed è stata etichettata con l’immagine stereotipata di inefficiente ed “esotica”. Coinvolgere l’Irlanda nel dibattito ci consente di isolare i processi sociali da questioni più precipuamente geografiche o spaziali.

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This challenging study of Southern Europe is entitled “Southern Europe?” with a large question mark. As Martin Baumeister and Roberto Sala note in their Introduction “Southern Europe” has been at the centre of the EU crisis since 2007. We still lack a good comparative study of the experience of the crisis in its epicentre and this book does certainly not claim to be that. Instead, it asks “What is (or perhaps where is) Southern Europe?”. Is Southern Europe a place, a series of places, a particular type of society or the subordinate part of a relationship with somewhere else? Perhaps Southern Europe is just a construct of the imagination or even only a term of opprobrium?

We can approach that question by remembering that the unlovely acronym for the debt crisis countries, the PIGS (Portugal, Italy, Greece and Spain) has sometimes been expanded to P<sup>+</sup>IGS to include another bailout country – Ireland. The book enumerates many different conceptualisations of “Southern Europe”. Asking if these potentially could include Ireland clarifies what is involved – whether “Southern Europe” is more than just a geographical area.

## 1. THE SOUTHERN EUROPEAN WELFARE MODEL

Baumeister and Sala use some simple bibliometric analysis of academic journals to show that since the 1980s social scientists have become much more likely than historians to use the term “Southern Europe”. One driver for this expansion has been the exploration of the specific features of the welfare state and social policy in the South. In one of the most influential of social science typologies, Esping-Andersen (1990) identified “Three Worlds of Welfare” within developed capitalist societies: the liberal, exemplified in Europe by the UK; the conservative, exemplified by (West) Germany; and the social democratic, exemplified by Sweden. The power of the typology was that each of the three different worlds of welfare had its internal coherence and logic. Accordingly, each world or model could be expected to be self-reproducing.

Even allowing for the necessary simplifications needed to produce such a typology, Southern Europe simply did not seem to fit into any one of these three types. Whereas at first the South – which initially meant Italy – was treated as a subtype of the conservative corporatist model, in particular Maurizio Ferrara suggested there was a distinctive Southern model of welfare. That system protected individuals employed by the state and by the few large firms. The family was central because it re-distributed benefits derived from this core employment to members without such protection. Such employment also provided pensions, usually based on very early retirement, and these also supported members of the family who would otherwise have little or no regular income. While a pension system such as that of Greece could appear completely irrational to outsiders, such a systemic approach showed how the system was also crucial to the welfare of many young people.

In the 1980s Ireland was often seen as similar to the South. Experts joked that Ireland, with its clientelistic state and its incomplete welfare system, was really in the Mediterranean – the only difference being the atrocious climate and the even more atrocious food. Nowadays the food has certainly improved, but so has the welfare state. According to EU-SILC data, in Greece in 2009, precisely 12.4% of all unemployed were in receipt of unemployment payments; the comparable figure for Ireland was 67.9% – higher than the mean for the four Nordic countries (Gallie, 2013, p. 24).

## 2. THE MODERNISATION OF SOUTHERN EUROPE

While the Irish experience suggests that change is possible, at first sight the Greek experience shows how much of the Southern European welfare model can remain in place. However, if the institutions have changed little, what is remarkable is how much else has changed. In early formulations there was a neat fit between a welfare state that prioritised a single male family member’s access to core employment and a society in which women’s paid employment was secondary and women were subordinated – not least by conservative religious teaching – within the family. Yet through the 1990s and up until the crisis all that was in flux. As this book makes clear, another approach to Southern Europe has been to postulate an almost unstoppable movement towards “European” living standards and institutions especially from the 1990s onwards. This was clearly the position of Kaelble in his social history of Europe since 1945, first published in 2007. Southern Europe was defined by the fact that it used to be backward and distinctive, but was now becoming normal, modern, European.

Changes in gender roles in Southern Europe are relatively undiscussed in the book, although they are important evidence for the modernisation/Europeanisation thesis. Everywhere there has been an apparently irreversible move away from traditional roles. In the early 1990s in both Ireland and Italy less than 50% of all women of core working age (25-54) were employed; by 2008 Ireland had joined the European mainstream on this indicator, and even in Italy the proportion had increased by another ten percentage points (Wickham, 2016, p. 225). In the crisis employment rates for women have fallen, but significantly the fall amongst men has been steeper. Unlike in early crises, nowhere have there been calls for women to leave the labour market and return to their “natural” place in the home.

For historians like Kaelble, modernisation was more a rather general orientation than a rigorous theory. In his chapter Wolfgang Knöbl presents a brilliant account of the development of the formal sociological theory of modernisation from the 1950s onwards. In Spain and in Italy American sociologists and anthropologists working within the theory were drawn to small scale studies of villages seen to be undergoing “modernisation”. Here too there is an Irish parallel, for in Ireland also conceptually based anthropology and sociology meant an obsession with putative changes in remote rural areas. And as in Southern Europe, this orientation ensured that such researchers had little understanding of major trends in the society as a whole. Knöbl however suggests that some historians used “heterodox modernisation theory”. Instead of accepting the logic of structural functionalism, which assumed that all elements of society fitted together, they focused on the possibility that different sub-systems (the economy, the polity, etc.) could modernise at different speeds or even not modernise at all. Using this approach, American historians such as Stanley Payne could tackle the apparent disjunction between economic modernisation and political retardation in Spain, and Roland Sarti could explore Mussolini’s modernisation of Italy.

### 3. SOUTHERN EUROPE AS EUROPE’S PERIPHERY

In whatever form it surfaced, modernisation theory involved two problematic assumptions. Firstly, it assumed that each national society could be understood as a self-contained entity, developing according to its own internal dynamic. While each national society could be compared with other such societies, questions of the relationship between societies were ignored. Secondly the theory was normative: either in whole or in part, modernisation was not only the normal but the desirable direction of change. We all will become modern, we all want to be modern, we all should be modern. While fully fledged modernisation theory has long been abandoned within academic social science, these basic tenets are still part of contemporary intellectual common sense.

In their chapter on what they term the interrupted industrialisation of Southern Europe Annamaria Simonazzi and Andrea Ginzburg draw on a very different theoretical tradition. While modernisation theory insisted on seeing backward and modern societies in isolation, dependency theory, originating in the study of Latin America in the 1970s, argued that these allegedly backward and *peripheral* societies were actually shaped by their relationship with modern *core* societies. This theory was widely criticised for being inherently simplistic: firstly it treated all social change in the periphery as the result of changes in the core, and secondly, it saw the relationship between core and periphery as one of unchanging dominance.

The strengths and weaknesses of dependency theory are all evident in Simonazzi and Ginsburg's account. Thus instead of treating industrialisation (and the lack of it) in the South as driven by internal forces, they place it firmly in the context of industrial change in the North. What matters therefore is the context in which industrialisation of both the latecomer (Italy) and the "late-latecomers" (Spain, Portugal and Greece) occurs. They argue that this context ensured that industrialisation halted so that the gap between heightened consumption standards and the retarded productive capacity had to be made good by remittances and by tourism. Since the early 1980s, macro-economic policies have meant that European integration has hollowed out the industrial structure of Southern Europe, accentuating the differences both between core and peripheral countries and within the peripheral countries themselves. As a peripheral area, Southern Europe became a subordinate part of the German dominated industrial production system of the core, only to be abandoned in the 2000s as German high-tech manufacturing integrated its new and lower cost production zones of Central Europe.

To the non-economist this chapter will seem over-detailed. More importantly, the relationship between core and periphery is essentially collapsed into one between Germany and the South. If core and periphery are understood primarily in geographic terms, it made sense at one time to describe Europe in terms of an affluent core (stretching perhaps from Stockholm to Milan) and a peripheral core, yet core-periphery relations are not necessarily so neatly geographical. The Irish case exemplifies this, and also shows how dependency relations can change. After independence in 1922 Ireland remained economically dependent on its geographical neighbour, Britain. However, since the late 1950s the attraction of foreign direct investment has become the keystone of Irish economic policy; since 1973 Ireland has been a member of what became the European Union. If economic relations are to be seen in terms of core and periphery, what has mattered for more than fifty years has been the role of US multi-nationals, yet if political relations are to be seen in the same terms, then what matters more are relations with "core" European powers.

Geography, it turns out, may be the basis of core and periphery relations, but geography itself is not so reassuringly natural as we often believe. Russell King's chapter on *Migration and Southern Europe* asks whether this can be seen in terms of a "centre-periphery dynamic". If we draw a map of Western Europe with arrows indicating the size and direction flows in the "classic" post World War II period, then there is a reassuringly simple pattern. Migrants flowed from the edge of Europe (and from adjacent North Africa and Turkey) into the core.

Yet these flows were hardly the whole migration story. Even in the classic phase, much immigration into Britain was long-distance: not just across the Irish Sea from Ireland, but across the Atlantic from the West Indies (and somewhat later from Pakistan and India). Today of course, as King documents, physical geography still matters. Immigration into Southern Europe is partially shaped by the fact that Southern Europe is Europe's porous frontier. At the same time however, much unskilled immigration into Europe leapfrogs the immediate periphery: people, whether refugees or economic migrants, come from sub-Saharan Africa or the Middle East. Such long-distance migration is not the novel consequence of new transport and communication technologies as is sometimes claimed. After all, the 19<sup>th</sup> century was the peak period of European emigration, and for these migrants the key destination. However, from the 1920s onwards the USA ceased to welcome mass immigration. The closure of the Atlantic route is one precondition for the apparently

natural core-periphery flows in Europe's classic immigration phase – a phase that turns out to be historically rather unusual.

King offers a useful periodisation of Southern European migration. His account of the third post World War II phase, of immigration “from the periphery to the semi-periphery” importantly connects the form of immigration into Southern Europe to its economic structure and to its welfare state. This “Southern European Model of Immigration” thus links to issues discussed in other chapters of the book. The final phase of migration returns however to a core-periphery model, with young and educated Southern Europeans again moving from the periphery to the core. Yet even here the core-periphery map is deceptive. Of all four PIIGS, it is actually Portugal and Ireland that have by far the highest levels of graduate emigration. Yet for many of these migrants their destinations are not within Continental Europe. More so than in the 1980s (the last period of mass Irish emigration), Irish emigrants head for the Anglosphere – the UK, Canada, Australia. And even the Portuguese, it seems go overseas, especially to Angola and Mozambique (Glynn, 2015). What matters it not just geographical contiguity, but cultural resources (language) and whether or not the borders are open.

#### 4. SOUTHERN EUROPE AS EUROPE'S INTERNAL OTHER

A theme running through the book and discussed explicitly in Patricia Hertel's chapter is that “the South” has been “othered” within contemporary discourses, whether scholarly or popular. With plentiful references to Edward Saïd's *Orientalism*, the argument goes that Southern Europe became Europe's internalised “other”, a backward, exotic and perhaps enticing land. Such images can of course be utilised by their recipients. From the 1950s precisely such images became part of the new mass tourism product of the sunny South.

As we have seen, up until the crisis economic growth and social change gave credence to “modernisation” as a background understanding of the South in many academic discourses. In everyday understandings in the North however, the crisis has re-energised the negative stereotypes. Notoriously the popular press in Germany has at times understood the Greek crisis in terms of spendthrift Southerners begging money from thrifty Northerners. In the crisis too it seemed that Ireland risked ritual contamination by association with the South – after all, Ireland and Irishness has long been identified in British stereotypes as charming but primitive and certainly not financially reliable. During the various bailout negotiations the Irish government seemed determined to prove that Ireland really should not be confused with those shifty Southerners. Yet if the negotiations amongst bankers and finance ministers were shaped by one definition of Europe and its internal other, that definition was also open to challenge. In Ireland the new popular left quite consciously used the rhetoric developed by parties such as Syriza and Podemos to call for solidarity with Greece as part of an alternative Europe.

#### 5. CONCLUSION

Perhaps it all depends on where you stand and from where you look. Hertel notes in her chapter calls for a decentring of European history. At its simplest this means including in the European story areas away from the centre: Scandinavia, the South, the Balkans

and perhaps above all, what used to be called “Eastern Europe”. Here clearly social science is ahead of history, even if most work is still limited to comparing and contrasting different national institutions and social structures. Developing models such as that of a Southern European Immigration allows a better differentiation between geography and social structure as causal factors. This is especially the case if the model is used to examine areas of Europe which might be peripheral but are not geographically Southern. Indeed, expanding the PIGS into the PIIGS suggests that looking for common cause of the economic crisis in their socio-economic structure is dubious.

In his concluding chapter Massimo Piermattei calls for a Copernican revolution, a study of Southern Europe in terms of the overarching European integration process which, so he claims, has reconfigured Southern European in terms of *European* regional policy. However, this assumes the continuing pull of the European sun on the European planets. Treading in Braudel’s footsteps, contemporary scholars such as Abulafia (2011) have headed South and taken the Mediterranean itself as their topic. The contributors to this book seem to assume, like the modernisation theorists they criticise, the inevitability of continued European integration. In 2016 a collapse of the European Union is no longer an absurdity. In that situation, Southern Europe might well become again the Northern shore of the Mediterranean.

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