



Martin Baumeister, Roberto Sala (eds.)

SOUTHERN EUROPE?

*Italy, Spain, Portugal, and Greece
from the 1950s until the present day*

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Southern Europe?

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Greece from the 1950s until the
present day**

Campus Verlag
Frankfurt/New York

About the book

Gegenwärtig erlebt der Süden Europas in der öffentlichen Debatte eine neue Konjunktur. Mit Vorliebe wird dabei ein europäischer Nord-Süd-Gegensatz heraufbeschworen, ohne jedoch auf seine lange Geschichte zu blicken.

Wirtschaftlich und politisch unterentwickelt, unterschieden sich Italien, Spanien, Portugal und Griechenland nach dem Zweiten Weltkrieg von den sogenannten westeuropäischen Gesellschaften. Zu Beginn des 21. Jahrhunderts schien diese Ungleichheit überwunden. Nun droht die Schuldenkrise den Kontinent erneut zu spalten. Die Beiträge hinterfragen gängige Annahmen und Bilder von »Südeuropa« und ergründen, inwiefern der »Süden« einen homogenen Raum mit strukturellen Gemeinsamkeiten darstellt.

Vita

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Introduction

Martin Baumeister and Roberto Sala

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 dynamic 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 Mediterranean 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.

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 discussion 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 outdated 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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I. Southern Models?

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.³ We can see this opposition for example in the dispute between two historians studying Southeastern Europe. Maria Todorova in an influential 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.⁴

Looking at the Todorova-Sundhaussen controversy⁵, 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 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).⁶ 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 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 sometimes 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)

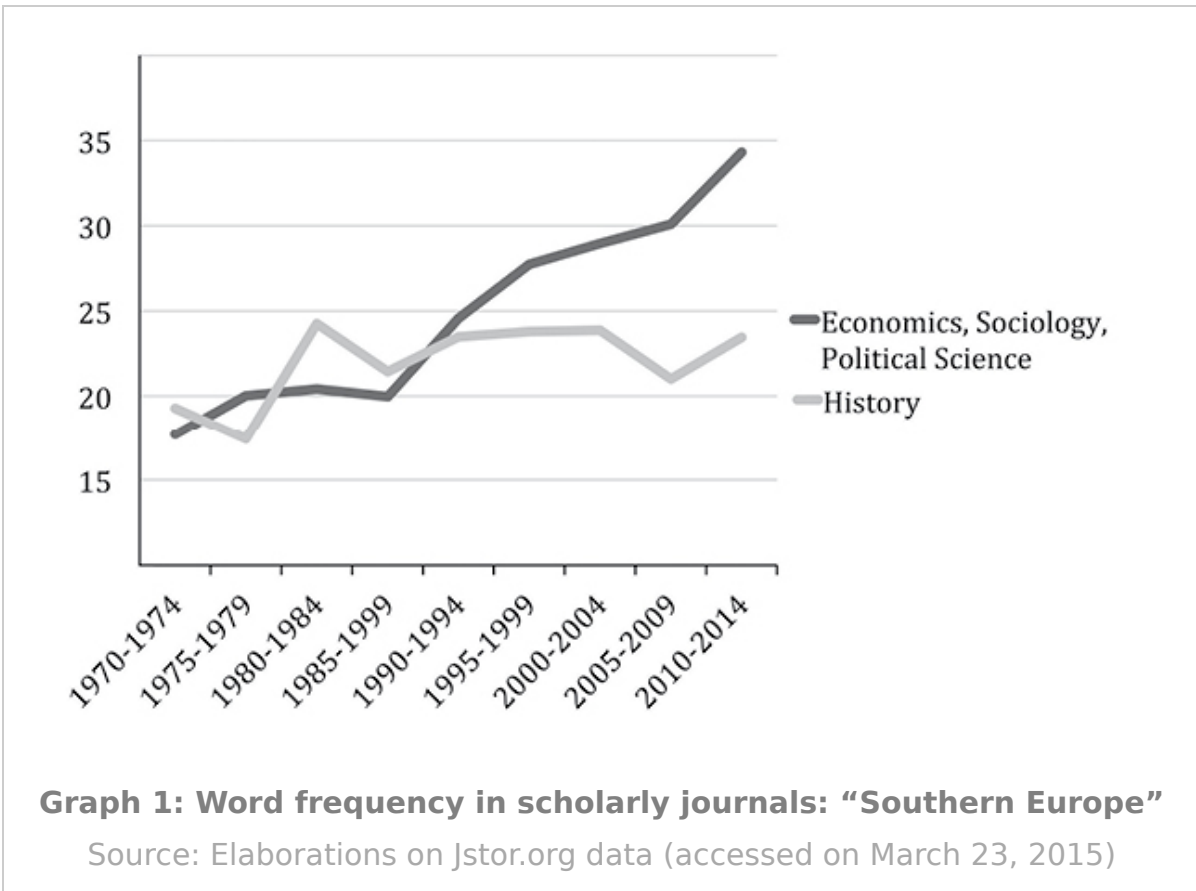
Like Stanley Paine and—more recently—Effi Pedaliu (2013), Malefakis came to the conclusion that Southern Europe is a useful tool for research on contemporary European history (Malefakis 1992, 80). Most remarkable is the fact that Malefakis considered the concept a product of social sciences. By using 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 sciences. Besides the works cited above, further studies in modern and contemporary 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).⁷ In comparison to the considerable social scientific production on the topic, however, historical studies appear not to have 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.



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,