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Comparisons, Categories, and Labels: Investigating the North–South Dichotomy in Europe

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Abstract

The paper presents genealogy-oriented analysis of how the Nordic model gained its dominant characterisation as modern, advanced and superior to other European welfare models while Southern European countries came to be labelled laggards in the welfare domain. To illuminate the relational nature of these, and all, comparisons, the analysis accentuates how researchers, politicians, and civil servants alike designate Nordic and Southern European states, their societies, and their welfare models. The empirical analysis focuses on scholarly writings about welfare-state comparisons (1986–2017) and on European Union documents addressing cohesion policies (1986–2021).

This analytical scrutiny of the vocabulary and labelling applied in European comparisons illuminates how the Scandocentric and the South-related bias have been produced and reproduced in different parts of society. While cross-country comparisons stem largely from statistical measurement, their results are communicated in words, a dimension of comparison not addressed by prior research. The analysis indicates that labels, once established, tend to get replicated without question and grow unquestionable in science and policy-making both. While reducing complexity and increasing predictability, this process simultaneously constrains alternative ways to interpret changing situations and alternative contexts. It is incumbent upon social scientists to make these taken-for-granted certainties that govern the present visible.

Keywords: comparisons, labelling, welfare state modelling, dichotomies, Europe, policy discourse analysis

1. **Introduction**

Everyday comparisons between countries or nationalities are often accused of falling into broad generalisations or creating stereotypes. Scientifically oriented disciplines have produced ostensibly more sophisticated forms of comparison, typically called taxonomies, categorisation, typologies, or models. In welfare-state research, comparative analysis applying these has been a major trend since the 1990s, although the history of model-building extends back to the 1950s (Flora and Heidenheimer 1981; Kuhnle 1981; Titmuss 1974; Wilensky and Lebeaux 1958; see also Abrahamson 1999; Arts and Gelissen 2002, 2012; Baldwin 1996; Christiansen and Markkola 2006; Kautto et al. 1999, 2012). In the last five decades, scholars engaged in comparative social-policy research have pinpointed several distinct models or regimes of welfare states as implemented in the world.

Building on insights from constructivist analysis, our study proceeded from the notion of constitutiveness of language (Hajer 1995; Paul 2009; Risse 2000). From this angle, categorisation schemes produced in academia, devised in politics, or generated by the media are understood as constructing and constituting the world around us. This paper examines the seemingly profound and permanent North–South dichotomy in the European context and makes visible the interdiscursive connections of science and politics in constructing and maintaining it. Applying a genealogical approach, we analysed how the 'Nordic model' gained its prevailing characterisation as modern, advanced, and superior in relation to other European models. To shed the greatest possible light on the relationality of comparisons, we focus here on how we as researchers and politicians speak of Nordic and Southern European states, societies, and welfare models[1].

[1] The Southern European welfare model is typified by dualistic social protection with focus on occupation-linked insurance, universal health care, weak safety nets, and strong familialism (Ferrera 2012). The Nordic one is known for emphasising social rights, equity, and universality, and for an extensive, mostly tax-financed public sector that provides the health and social services. These produce a degree of redistribution that is higher than under other models (Kautto 2012). When analysing the core characteristics of welfare states or studying the related labelling, it is important to bear in mind the highly divergent historical contexts where Southern and Northern welfare states emerged and developed (ibids.)

In research as in life more generally, categorisations serve as efficient means to simplify a complex reality. They can be considered taken-for-granted when their use goes without explanation. Successful categorisations can be understood easily, which facilitates their diffusion from one person to the next, from research to politics, from country to country, etc. When political decision-makers adopt a certain category, opportunities for its wider diffusion are created. This often takes place in co-operation with media entities (Tervonen-Gonçalves and Oinonen 2012; Czarniawska and Joerges 1996; Müller et al. 2018).

Recent political, social, and economic challenges in Europe and the global rise of populism have favoured the creation and utilisation of superficial categorisation and simplification (Matthijs and McNamara 2015). That said, the growth in populist tendencies has been accompanied by accelerating demands for evidence-based policies. The evidence called for is scientific in nature, with both researchers and the authority of science being called on to support political decision-making (Boden and Epstein 2006; Fischer 2009; Newman 2017). But what kind of evidence is in demand?

It seems that those studies that provide evidence in the form of comparisons and grouping into categories are especially welcome. Welfare-state-related research, which has offered comparative information and models for some time now, is one of focal areas of research that has responded to the challenge in Europe (e.g., Esping-Andersen et al. 2002)[2]. Generally, this branch of research has treated the Scandinavian model as best practice (see Scharpf 2002). As an authoritative and prestigious political-administrative institution, the European Union (EU) follows by formalising the categories declared by science (Tervonen-Gonçalves 2012; see also Bonoli 1995; Ferrera 2012). It also produces statistical information of its own (e.g. Eurostat) (See Mörth 2004). From this major multi-sector organisation, categorisations and labels spread rapidly not only to all of its members but throughout numerous policy domains, worldwide.

Comparative social research often produces categorisation and classification systems that highlight differences or similarities grounded in statistical data. An important part of this

[2] See page 19.

comparison is labelling, which can be understood as a tool of communicating and describing the results of comparison. Though comparisons are central to both research and European policy-making, debate on labelling and the associated power of comparisons has remained scarce (Tervonen-Gonçalves and Oinonen 2012; Kettunen 2006). According to Barbara Czarniawska and Bernward Joerges (1996), words are turned into labels by frequent repetition, often in unchanged form in similar contexts, and successful labels spread from one context to another, ultimately becoming institutionalised categories.

Many of the most successfully propagating categories are dichotomies, with trichotomies occasionally appearing in the model but larger numbers of vertices found only rarely (Noël 2006). Dichotomous division of Europe into 'South' and 'North', 'centre' and 'periphery', 'laggards' and 'front runners' has been visible in many arenas, research among them. Use of dichotomies and juxtaposition of opposites render comparisons easily understandable and, therefore, easily spread and successful. Although attempting to pinpoint the origins of categories and dichotomies is difficult and may even be pointless, it is important to try to understand how they become dominant and get taken for granted. The method of genealogy is suited to tackling this task.

This article is intended to stimulate debate about the constitutive nature of European comparisons. It draws attention to categorisations as not only reflecting a diversity-rich European reality but also constructing the future Europe and the world in which we live. We begin by describing the methodological approach and our data, then present empirical analysis of what occurs in terms of labelling when one compares welfare states. Once we have scrutinised the process of labelling practised in the social-scientific domain, we turn to the political realm and consider the constitutive power of comparisons and labels. In this connection, the EU´s cohesion policy is examined as a concrete case. Finally, we discuss the results.

2. The theoretical-methodological framework and data

Constructivism takes the stance that words – be they names given to categories, the labels used, or whole vocabularies set in motion – not only describe or reflect the reality but also construct it. Accordingly, language and texts merit study in that they are understood to constitute reality or be part of 'world-making' (Fischer 2003; Paul 2009; Risse 2000). While discourse is commonly understood as a patterned way of thinking and arguing (Seidel and Vidal 1997), it is the task of the analyst to make these patterns visible. In this article, we combine a discourse-theory-informed approach with genealogical methods.

The constitutive nature of discourse and, in particular, its inbuilt power to categorise and label, is evident in the following definition of discourse provided by Chris Shore and Susan Wright (1997, 22): 'Discourse is a particular way of thinking and arguing which involves the political activity of naming and classifying, and which excludes other ways of thinking.' Although multiple discourses operate simultaneously, dominant discourses stand out in setting up terms of reference and disallowing or marginalising alternatives to these (Seidel and Vidal 1997).

Genealogy is an approach that can be useful for investigating the 'history' of taken-for-granted concepts or states of affairs, such as the North–South dichotomy constructed and upheld in various societal arenas, as Paula Saukko points out; it does this through examining historical documents for purposes of tapping into moments and eras wherein particular statements begin to recur, thereby producing a history (2003, 133). In our study of the construction of that particular dichotomy and the related notion of Nordic superiority with regard to welfare issues and beyond, we pinpointed one such stretch of time as the mid-1980s to 1990, when Gøsta Esping-Andersen's *The Three Worlds of Welfare Capitalism* was published. This seminal work laid out the results of international welfare scholarship and attributed highly distinct characteristics to Nordic welfare systems (Christiansen and Markkola 2006, 12). With that book, a golden age of welfare-state modelling business (see Abrahamson 1999) began. In the era of modelling welfare states, the label 'welfare state' itself came to be associated with a certain class of industrialised capitalist society,

characterised by certain properties (Arts and Gelissen 2002), and the Nordic model[3] became its prime example and constructed as the best possible way to look after a nation's welfare (Baldwin 1996; Christiansen and Markkola 2006).

Mapping statements within discourse leads one to interdiscursive exploration, whereby connections emerge between one particular discourse (e.g., in comparative social-policy research) and others, such as political preoccupation with European unity, cohesion, and convergence (cf. Saukko 2003). Following Foucauldian ideas, Saukko described discourses as constituting their objects through repetition and as, by repetition, knitting together multiple kinds of knowledge and several discourses into a broad political and social agenda. The task for genealogy here is to unravel the way in which a given discourse weaves together social-scientific and political agendas (122).

A characteristic feature of genealogy is the way in which it reads the history. While the traditional history of origins legitimates the present by finding its roots in the past (e.g., calling Southern welfare states ex-fascist), studying genealogy is aimed at challenging the present (Tervonen-Gonçalves 2013; Saukko 2003). According to Saukko, the genealogical method is characterised by a careful reading of historical details in terms of not the truths they tell but the truths they constitute (118). Social scientists tend to agree that, in essence, all typologies created in the discipline are 'mere abstract models' and that, as such, they are seen as conceptual tools of some kind that aid in figuring out the complex reality. At the same time, however, these conceptual models restrict thinking and action – of researchers, policy-makers, politicians, and citizens. In other words, not all categorisation systems or categories attract the same degree of attention; the attention level depends on the extent to which the categorisation in question is able to contribute to the institutionalisation of the paradigm, which hinges, in turn, on which scientific and social paradigms are regarded as current (Bothfield 2008). Esping-Andersen's regime theory and

[3] The idea of Nordic uniqueness has been traced to the 1930s in international politics. At first, Sweden was understood as quintessential in this regard, but the term 'Nordic model' has encompassed also Denmark, Finland, Iceland, and Norway from the 1950s onward. Comparative welfare-state research has employed the concept since the 1980s. One can conclude that the notion of the Nordic model has become standard in that field and political-science studies, as well as in political debate (Christiansen and Markkola 2006, 9; see also Alestalo et al. 2009).

its offspring gained predominance in the field of international social-policy research in the 1990s. When Peter Abrahamson dubbed this flourishing practice 'the welfare modelling business' a full 20 years ago, he rightly predicted that it would 'continue as an important dimension of welfare and social-policy research well into the next millennium' (1999, 394).

With this paper, we lay bare the categorisation and labelling practised in political and public spheres, and we shed light on the constitutiveness of comparative discourses. The data sources consist of both scholarly writings on comparisons of welfare states and documents produced and published by the EU on cohesion policy. In the former class are books, chapters therein, and articles published in scientific journals, most of them in English. In line with the tradition of scientific publishing, authors appear under their own name. For detailed analysis, we selected 33 key works published in 1986–2017 in the field of comparative welfare-state research that describe both Southern and Northern Europe. As for EU documents, we examined 13 issued on regional policy and, more specifically, cohesion policy. These works, all in the English language and available on the European Commission (EC) Web site, are the EU's second evaluation report on economic and social cohesion (2001), the strategy document *Cohesion Policy 2007–13: Commentaries and Official Texts* (2007), the cohesion-policy history presented in 'EU Cohesion Policy 1988–2008' (2008a), the 'Regions 2020' report assessing future challenges for EU regions (2008b), background document 'Globalization Challenges for the European Regions' (2009), the strategy document 'Cohesion Policy 2014–2020: Investing in Growth and Jobs' (2011a), the report 'Economic Challenges of Lagging Regions' (2017a), and the so-called Lagging Regions Report (2017b), alongside several documents and info sheets published on its Regional Policy pages: 'History of Policy' (2011b), 'The EU´s Main Investment Policy' (2019), and 'Cohesion Policy Frequently Asked Questions' (2020), 'European Regional Competitiveness Index' (2021). Although all of these were published post-2000, the materials analysed describe the categorisations applied in cohesion policy since 1986[4]. Also, info sheet 'Overview of Regions and Cities' (2021) published on Eurostat pages was examined.

[4] Also considered was the Single European Act (1986), available from the EUR-Lex database.

The sources of these materials are two distinct institutions, each with its own rules and legitimate modes of expression. Interested in finding commonalities among the texts with regard to European comparisons and, especially, the repetitive positioning and labelling traceable in those comparisons, we searched our data for those descriptions in which Northern and Southern Europe or Nordic countries and Southern European countries are positioned in relation to Europe. Our interest was in the comparisons themselves and in ascertaining which related discursive elements – categorisations, names, and labels – are repeated with respect to particular societal arenas. In our age, what are the typical ways of conceptualising Europe, the European social space, and – especially – Northern and Southern Europe comparatively? Besides delving into the content of the categorisations, we investigated those techniques that have made such comparisons successful.

3. Labelling European welfare states

This section looks at what is done in terms of labelling when welfare states get compared. We start by analysing how the so-called Nordic model came to be considered superior in relation to other models. To gain understanding of the historicity of this development, we directed our attention to the positionings given to that model relative to others, over the decades, and to how it and the models depicted as opposite have been labelled.

The fundamental idea of model-building is to emphasise both the similarities represented by the relevant type, model, or cluster and the differences between types, models, or clusters (see Ragin 2000). Interested in how differences are built, we proceeded from the notion that labelling plays a significant role in this. Although welfare-state research's models and their mutual differences are based on a wide variety of statistical analysis and manipulation[5], the fundamental mechanism of rendering them comprehensible involves choosing one salient feature explaining the models' functioning in terms of ideology,

[5] The very first words in the preface to Esping-Andersen's *The Three Worlds of Welfare Capitalism* (1990) crystallise this: 'It may not show, but this is a book that stands on a veritable mountain of data and years of endless statistical manipulation.'

principles, or institution and naming them accordingly. Thus, when Richard Titmuss presented his three '*contrasting* models of social policy [emphasis added]' (1974), he highlighted the differences between his models and denoted these three as a 'residual welfare model of social policy, industrial achievement- performance- model of social policy and institutional redistributive model of social welfare' (30). Although Titmuss briefly discussed several empirical examples of these models[6], he did emphasise that the models are only rough approximations of real-world social policies. It is worth noting also that the models cited at the time were of social policy, not welfare states. At that point, Nordic countries did not feature among the empirical examples (ibid.).

By the mid-1980s, there was already considerable evidence, from comparative social-policy research, that Nordic welfare states had developed a 'distinctive welfare state model' (Alestalo et al. 2009; Kautto 2010, 590). Since then, the notion of said model has been standardised in both Nordic and international social policy (Christiansen and Markkola 2006, 12). Whether conducting social-policy or welfare-state comparisons that involve Nordic countries, researchers have generally used neutral, geographical terms, such as 'Scandinavian' (Erikson et al. 1987; Esping-Andersen and Korpi 1986; Ferrera 1996; Leibfried 1992) or 'Nordic' (Greve 2007), to describe this model. When employing qualitative terms instead, they have called these models 'modern' (Leibfried 1992) or 'encompassing' (Korpi and Palme 1998) or have labelled them with such political terms as 'social democratic' (Esping-Andersen 1990) or 'Protestant social democratic' (Siaroff 1994), where social democracy has been equated with the positively charged values of universalism, egalitarianism, and solidarity (Kuisma 2007). According to Peter Baldwin, the 'Nordic model has commonly been regarded as the embodiment of the highest stage of the welfare state's evolution' (1990, 43). It has been argued that Nordic researchers have shown a tendency to analyse welfare states in terms of variables that are salient in Nordic countries but not necessarily in other societies (Hellsten 1995). In consequence, mainstream research has been biased toward examining all welfare states on the basis of institutions, values, and political-cultural choices recognised as central specifically in the

[6] Titmuss discussed the following countries or societies as empirical examples: Brazil, Ireland, France, Israel, Nazi Germany, South Africa, Tanzania, the USA, the USSR, and West Germany.

Nordic countries (Baldwin 1996). Matti Alestalo, Sven E.O. Hort, and Stein Kuhnle (2009) have termed this bias 'Scandocentric'.

While Scandinavia has been depicted as 'the best of all worlds' (Abrahamson 1999), researchers have located the other pole in their comparisons of European welfare states as lying in Southern Europe, with the following expressions getting employed for a Southern-European-type welfare state: 'rudimentary' (Gough et al. 1997; Leibfried 1992), 'semi-institutionalized promise' (Leibfried 1992), 'peripheral' (Kosonen 1995), 'post-authoritarian' (Lessenich 1994), 'distinct group of laggards' (Katrougalos 1996), 'ex-fascist' (Navarro and Shi 2001), and 'immature' (Muffels and Fouarge 2004). The overall 'immaturity' of Southern European welfare states has been considered either a passing feature of their development, as manifested in the term 'catching up countries' (e.g., Leibfried 1992), or a relatively stable structural or institutional feature. Behind the notion of catching-up countries, we can find a modernistic assumption that lagging Southern European states will follow the development path taken by more advanced welfare states.

Applying the approach of Maurizio Ferrera (1996), Southern European researchers have identified these countries as having their own distinct model of welfare production and spoken of it in neutral, geographical terms as 'Southern European' or 'Mediterranean' (Guillén and Matsaganis 2000; Moreno 2000; Rhodes 1997). Ana M. Guillén and Manos Matsaganis (2000) explicitly argued that labelling Southern European countries as rudimentary welfare states has been misleading and rooted in misinterpretation of empirical data. They concluded that the problem facing Southern European welfare states is not that they are lagging behind as systems but that they suffer from imbalance among individual parts of the systems, which leads to increasing inequality and inefficiency.

In his 1999 article on the state of the art, Abrahamson examined depictions of the Continental model in terms of shortcomings or missing elements relative to the Nordic or Anglo-Saxon model rather than in terms of what distinguishes it in its own right. He not only highlighted that this contrast favours one set of cases over the others but also called attention to the pejorative ways of describing the Continental model (400). When Southern

European countries were brought into the comparisons and the number of models thus grew from 3 to 4, their model, in turn, was presented as opposite the others. That added further rotations to the normative bias. Once Southern European countries were included in the analysis, the Southern model gained the label of 'rudimentary' and Southern countries were the ones lagging, while the Nordic model was modern and Nordic countries forerunners.

This manifests human cognition's tendency to follow established ways of thinking, ordering new observations along the lines of known categories. Scientific thinking and reasoning are far from immune. Indeed, this tendency is at the core of building scientific paradigms (see van Kersbergen and Vis 2015). As Mary Douglas (2000 [1966]) pointed out, if something does not fit into the established picture, it gets treated as anomalous. One good example comes from a study by Ruud Muffels and Didier Fouarge (2004), who discovered that unemployed people were less deprived in Southern countries than elsewhere in Europe. This result was described as perverse (319), because it did not jibe with the picture of the immature Southern welfare state.

If the label 'laggard' has demonstrated stubborn endurance when applied to the Southern European welfare-state model, the idea of Nordic countries as superior or advanced in relation to others is likewise resilient. For instance, in 2010, Margitta Mätzke and Ilona Ostner called Scandinavian countries forerunners in that they have prepared their system well in advance for the problems of postindustrial societies, and Mary Daly and Emanuele Ferragina identified Nordic countries as being at the forefront of change with regard to progressive family policies in 2017. They stated that the 'original elements of policies are not dismantled or replaced but rather progressively accompanied by new policy instruments which sometimes overshadow them' (267). These more contemporary examples indicate that labels, once in place, tend to stick. Nordic countries seem to get depicted as forerunners in building the welfare state but also in downshifting or overhauling its core principles[7]. The label appears to endure even as the policies' content changes.

[7] Since the 1970s neoliberal ideology has brought along ideas and practices of deregulation, marketization and competition also to Nordic welfare states (Edling 2019, 323).

The central practices via which these labels and the related vocabularies are produced and reproduced are connected with conferences, books, journals, joint research projects, and policy advice for a wide variety of political organisations and decision-making processes (Marcussen 2004). According to Elina Palola (2007), the surge in comparative welfare-state research began back in the 1990s as a response to the EU's needs for information on its various member states' welfare systems and their development (see also Bonoli 1995; Ferrera 2012). Extensive application of knowledge and research in the modernisation of the European Social Model after the Lisbon Summit took the alliance of scientific and political communities to a new level (Palola 2007). With this backdrop from scrutinising the process of labelling in the domain of comparative social-policy research, we now turn to the labelling practised in politics.

4. European Commission labelling practices

The EU is currently composed of 27 nation-states, with distinct histories and various present-day conditions. The EU aims to promote integration and internal cohesion while improving the union's economic performance and competitiveness too. Cohesion-related policies play a pivotal role in these efforts, and, accounting for nearly a third of the total EU budget in 2014–2020 (EC 2019), are considered to constitute the EU's main avenue of redistributive policy (Bache 2015). The EU has invested tremendous amounts of money[8] to eradicate its territories' disparities via cohesion policy, but how has Europe(an space) been constituted in EU discourse? In this section, our focus is on Southern Europe and the picture painted of it in the language and practices of governance connected with cohesion policies.

Though cohesion policy expresses solidarity between richer and poorer parts of the EU, its depiction as the union's main redistributive policy delineates lines of tension: Central and Northern European members are the net payers, and those in the South and East are net recipients (see Bache 2015). The greatest beneficiaries of cohesion efforts in 1994–2006

[8] According to EU Cohesion Policy Database the cohesion policy budget for the period of 2014-2020 is €515bn (EC 2021b).

were Ireland, Spain, Italy, and Portugal (EC2008b). Thus, the labelling practices are embedded in the politicised issue of Europe-wide redistribution of wealth.

Italy was one of the founding members of the EU in its current form. The other countries of Southern Europe acceded in the 1980s: Greece, in 1981, was followed by Portugal and Spain, in 1986. Preceding the 'Southern expansion' was a decade of preparation and negotiation. It is worth remembering that the EU of the 1970s–1980s was primarily an economic union. With the expansion, the common economic area grew larger, but it was chiefly a political gesture of support for Southern countries that had suffered under right-wing dictatorships. In the history of European integration, this move extended the scope of integration into political and social realms (Single European Act 1987).

Although the Southern European countries had clearly made progress by 1986, the gulf with the other members remained considerable. The EU sought to reduce the differences in development among the Member States by means of cohesion policy (Bache 2015). In practice, this has entailed specifying goals and criteria for cohesion-directed policies and determining the allocation of financial benefits per the criteria defined. For 1988–1992, the main principle of cohesion policy was to focus on 'the most backward and undeveloped areas' (EC2011b). For 1989–1993, 1994–1999, and 2000–2006, the primary objective for subsidies from the Structural Funds was 'supporting development and structural adjustment of regions whose development is lagging behind' (EC2008a). This was followed, for 2007–2013, by targeting 'the least well-developed Member States and regions' (EC2007). The bulk of 2014–2020 cohesion-policy funding was concentrated on 'less developed European countries and regions in order to help them to catch up and to reduce the economic, social and territorial disparities that still exist in the EU (EC2019).

The Cohesion Fund directs subsidies to Member States 'whose GDP per capita is lower than 90% of the EU average' (EC 2019). For many years, this meant Greece, Italy, Spain, and Portugal (EC2008a). By dint of having received these subsidies, they are commonly identified as the cohesion countries (see Wallace 2000, 31).

The EU has expanded its borders over the years, but it was only the 2004 enlargement involving Central and Eastern Europe that widened the set of cohesion countries beyond Southern Europe: almost all of the new Member States were categorised as cohesion countries for 2007–2013 (EC 2011b). For the 2014–2020 programme period, EU cohesion policy accords priority to 'countries and regions whose development was lagging behind' (EC 2011a).

In 2017, the EC published a study report titled 'Economic Challenges of Lagging Regions' (EC 2017b). This recognises two distinct types of lagging regions: low-growth and low-income regions. While some portions of countries in Eastern Europe are specified as low-income regions, the entirety of Southern Europe makes up the low-growth zone: the area whose growth did not converge with the EU's average per-capita GDP under purchasing-power standards between 2000 and 2013. It is stated that '[t]his group covers almost all the less developed and transition regions in Greece, Italy, Spain and Portugal' (ibid.). Although the policy emphasis and the formal criteria for eligibility for financial benefits are defined at region level, the sentence cited above encapsulates how categorisations continue operating, also at national level. From the perspective of this article, it is worth noting that, additionally, regions within Southern European countries are now recognised as a specific type of laggard (low-growth regions) in EU27 context. This indicates that, although the criteria for labelling a country or region 'lagging' have changed over the four decades that Southern countries have been members of the EU, the position of laggard has remained.

In 2015, the Commission launched its Catching Up initiative, or 'Lagging Regions' initiative (EC 2017a). A governance practice of this sort assigns the subject position of laggard to the regions and countries applying for funding. In other words, a city, region, or country seeking funding under this initiative is required to position itself as a laggard relative to other cities, regions, or countries.

Primarily, the following labels have been used to identify those regions eligible for EU financial subsidies: 'the least favoured regions' (Single European Act 1987), 'less prosperous regions' (EC 2011b), 'the poorest and most backward regions' (EC 2008b), 'lagging regions'

(EC 2001, 2017b, 2019), ‘low-growth regions’ (EC 2017b), and regions that need help to ‘catch up’ (EC 2019). While ‘low-growth’ and ‘less prosperous’ fairly narrowly encompass economic conditions, the language of ‘lagging’ regions and ‘most backward’ is more expansive, pointing to a general level of (non)development. The idea behind the notions of lagging and catching up is that these areas should follow the general pattern of development and progress present elsewhere in the EU. For most part, the other end in the continuum of development and progress has not been explicitly identified in the analysed documents, but there are some indices where the term ‘region leading’ has appeared next to the ‘lagging region’ (EC 2009, 2017b). Also, category of “more developed regions” referring to those regions “where GDP per inhabitant was more than 90% of EU average”, provides an antipode to “less developed regions, where GDP per inhabitant was less than 75% of the EU average” (Eurostat 2021). Since 2007 more developed regions have been able to obtain cohesion funding under the objective of “regional competitiveness and employment”. This is often considered a turning point (Manzella and Mendez 2009) which shifted cohesion policy of a more liberal social-democratic policy of compensation for disadvantages into an economic governance instrument aiming to achieve the Lisbon goals of turning Europe into the most competitive region in the world. While EC (2021) launched regional competitive index in 2010 yet another ongoing comparative practise, now in the form of rankings, distinguished lagging regions and the most competitive regions from each other.

If, year after year and decade after decade, a country or region is labelled pejoratively in relation to its peers or partners, the negative terms may start getting echoed in its national policy documents too, whether strategies articulating the desired future of the country or reports depicting its history. Persistent positioning as a laggard and use of other, related pejorative labels provide actors with relevant discursive resources – sometimes the only ones available – and could well become the core to vocabularies of regions’ or nations’ collective identity-building. A study examining Portuguese government documents illustrates how the message percolated from arenas of science and European politics has been internalised in national policy-making; in the spirit of solid governance and adherence

to discursive discipline[9] (Hajer 1995), the discourse wherein the country is 'peripheral and lagging' has entered active use in national political discourse (Tervonen-Gonçalves 2012).

5. Conclusions

The foregoing analysis illuminates labels' and dichotomizations' use on a par with comparisons in research and policy-making. Headlines run in international media when 'coronabonds' reached the EU agenda as a possible solution to assist those Southern members hit hardest by the crisis, attest that the North–South dichotomy in European context is deep, profound, and perhaps even permanent:

'Fighting Pandemic, Europe Divides Again Along North and South Lines'
- *Foreign Policy Insider*, 30 March 2020

'Coronavirus reopens Europe's angry divide'
- *Washington Post*, 1 April 2020

While this dichotomy usually remains latent in public discussion, it agilely resurfaces in times of crisis, particularly where money and cost allocations are involved. Matthias Matthijs and Kathleen McNamara (2015) drew similar conclusions when analysing policy-making in the 'eurozone crisis' context. They described the process by which austerity became the sole legitimised solution for the crisis, supported by identification of national failings (as opposed to seeking more systemic explanations). Rhetoric juxtaposing Northern virtues (hard work, prudent savings, moderate consumption, wage restraint, and fiscal stability) with Southern vices (low competitiveness, meagre savings, irresponsible consumption, inflated wages, and fiscal profligacy) transformed the euro crisis into a 'morality tale'. The authors teased out how austerity became the answer, built on the foundations of the highly normative dichotomy of 'Southern Sinners' and 'Northern

[9] In Maarten Hajer's (1995) social-interactive discourse theory, dominant discourses give actors subject positions, which define their social and power relationships in terms of principal narratives. From this perspective, if wishing to be taken seriously in societal debate, actors ought to employ the same discourses and vocabulary that the other socially relevant actors do. Actors can deny or accept the positions offered, such as forerunner or laggard, but cannot ignore them. This factor, which may be termed discursive discipline, strengthens dominant discourses and the taken-for-granted 'truths' they support.

Saints'. Even only a brief glance at media headlines in the wake of the COVID-19 pandemic in spring 2020 reveals similar patterns. However vivid the European dichotomies displayed in these recent accounts, our analysis indicates that these patterns and the related oversimplifying categorisation of North/South are not an outgrowth of the euro-area crisis, events coalescing around the pandemic, or any other specific crisis; rather, they have been constructed over a much longer span of time. From analysis of four decades of academic studies and policy documents, one may argue that the Scandocentric bias observed in academia is replicated in the spheres of policy-making and the mass media too. We have demonstrated how categorisations can become dominant and taken as self-evident truth through simplification, dichotomisation, sheer repetition, and legitimising numeric comparisons and scientific authority. The categorisations and labels gain further strength when institutions such as EU entities formalise them in their language use and governance practices.

Our findings should stimulate and inform debate about the process of labelling in social-science research, especially in the field of comparative welfare-state research. As politics relies heavily on evidence and as researchers are called upon for their stamp of expertise and thereby legitimise politics and its arguments, it is vital to look more carefully at how to describe and label different ways of living and of resolving social and economic issues.

Firstly, though researchers consider several conditional factors behind the categories they create, those factors readily get lost when scientific discourse diffuses to public arenas. Accordingly, categories and labels gain acritical acceptance and get cited as truths. Secondly, some objects of politics may eventually start acting in the manner expected of them (see Hajer 1995). For instance, the 'immature laggard' position repeatedly accorded to Greece, Portugal, and Spain on the map of Europe and the ubiquitous media-borne labels of these countries as losers, weak, or less solid amid financial crises could be expected to exert a negative influence on national self-image and politics. Undoubtedly, the 'laggard' position has benefited Southern European societies with regard to cohesion funds, but has

that position also restricted these societies and obstructed new openings and independent development?

It is worth reiterating that labels, by definition, emerge from repetition. As these tags, once established, get repeated time and time again, they may operate against variation. Our analysis of the labels employed in welfare-state research and cohesion policy indicates that, while the labels chosen have exhibited some variation, overall perceptions have remained the same. With regard to negative labelling, our work makes strikingly visible the labels whereby the general sense of Southern Europe as a peripheral laggard propagates. Likewise, our study revealed how readily those countries in Southern Europe with a history of fascist state regimes are branded 'ex-fascist' or 'ex-authoritarian' welfare states even today. Similarly, the term 'crisis country', which gained widespread currency in post-2008-financial-crisis media discourse for denoting Greece, Portugal, and Spain (Tervonen-Gonçalves and Oinonen 2012), is still in use a decade on, in the form 'ex-crisis country'. Taking a broader perspective, we can observe that, notwithstanding popular culture's numerous terms for a less-than-respectable woman or a 'person of colour' in nearly any given language, the pejorative meaning and the overall perception remain the same. Hence, we find that the problem lies not in labels alone but in the entire labelling process. Particular labels today start conditioning future labelling. This is what the constitutiveness of labels is all about.

One would not expect categorisations and labels to prove as problematic for a country categorised and labelled as a 'Nordic welfare state' or among the 'best euro countries' or 'Frugal Four' as for one constantly classed as an 'immature welfare state' or as a 'true crisis country' or 'laggard'. Negative umbrella terms and labelling of Southern Europe lump countries together and conceal positive means of producing well-being and those institutions and cultural traits that maintain it in these countries. For example, women's participation in the workforce has been among the indicators used in categorising welfare states. High female representation here is associated with the Nordic model, supporting a definition of the Nordic countries as gender-neutral and egalitarian. In European context, Portuguese women's participation in the labour force has long been at the same level as

theirs (over 70% of those aged 20–64), yet Portugal instead gets characterised as 'interesting' or an awkward exception among the male-dominated, gender-biased countries of the South, where women's labour-force participation remains below the EU average (Tervonen-Gonçalves and Oinonen 2012; Eurostat 2020). Likewise, Southern European societies are regularly painted as religious and traditional. This obscures the fact that in 2005 Spain became the third country in Europe, after the Netherlands (2001) and Belgium (2004), to legalise same-sex marriage, with Portugal following in 2010. In contrast, a same-sex marriage act did not enter force until 2009 in Sweden and 2017 in Finland (ILGA Europe 2021).

From a Nordic perspective, the perils of stagnant labelling are quite different: repeated positioning of a given country or region as a forerunner in many domains, relative to its neighbours and other reference groups, could obscure deep societal problems and negative trends in these societies. For example, Finland has been depicted for decades as leading the way in public-health policy, but socioeconomic inequalities in health remain relatively high there (Mackenbach 2020). In fact, substantial differences in morbidity and mortality between social classes have been observed in other Nordic countries too. The lack of association between the generosity of these nations' welfare policies and the magnitude of the evident health inequalities has, in fact, been identified as a Nordic paradox (ibid.). Likewise, OECD PISA assessments repeatedly cite the Finnish education system as among the world leaders for learning outcomes, yet Finnish pupils rank low in international comparisons of the school-related well-being experienced (Suomen UNICEF 2012).

Every research discipline enshrines particular core texts or classics that sum up the essentials and guide future research. Disciplines running the gamut of social-policy research, sociology, history, political science, political economics, European studies, and beyond have undertaken comparative welfare-state research, with the indisputable central publication for all of these having been the above-mentioned *The Three World of Welfare Capitalism*, so much so that the *Journal of European Social Policy* devoted a special issue to the twenty-fifth anniversary of this sophisticated work's publication. Several telling observations were made in retrospect as to this book's impact on this comparative research.

According to Kees van Kersbergen and Barbara Vis (2015), *The Three Worlds of Welfare Capitalism* has obtained such paradigmatic status in comparative welfare-state research that its claims and conclusions are often taken for granted rather than challenged (see also Emmenegger et al. 2015). Our study demonstrates that the habitual forms of labelling, alongside these, continue to hold sway within the paradigm of welfare-state comparisons. This is partly explained by the fact that the role of language has remained under-studied in comparative research (Paul 2009). Bundled up with the lack of attention to the power of language might also be a sense that the debate on labelling is not scientific or relevant enough. In reality, though, with science being intertwined with the spheres of policies and politics, the question of labelling and of what we call other countries and regions – and, thereby, how we refer to the people living there – is crucial. Although the derogatory labels and dichotomies have not yet sparked major conflicts between European states, it is at the very least conceivable that they might induce political tensions, exacerbate conflicts, and hamper the construction of a common Europe. When trained scholars use reductionist labels for countries and regions in their input to policy-making, we should not be surprised if, for example, nationalistically tuned Euro-critical parties and other factions exploit these 'scientific results' politically. Detached from a scientific setting, conditional statements, and the bounds of statistical analysis or institutional theory, such labels could readily fuel outcomes that stand in sharp contrast against core values and principles of the European project: 'cohesion', 'convergence', and 'solidarity'.

The processes of labelling and dichotomization discussed in this article are closely related to the concept of othering, which Fred Dervin defines as differentiating discourses that lead to moral and political judgements of the superiority and inferiority of 'us' vs. 'them' (2015, 2). The other is often described within a deficit framework; that is, the other is not as good as 'we' are, and stereotypes emerge. Dervin outlines how this often happens in media, public, and even scholarly discourse. Indeed, our analysis has laid bare the process of othering in academia and, further, in EU governance practices intended to advance unity and cohesion. Several mechanisms of othering can be identified from our data: juxtaposition (emphasising oppositeness), pejoration (using pejorative labels), homogenisation (lumping countries together and ruling out variation via stereotypical

description), exclusion (ignoring certain cases or certain aspects of them outright), and conditional inclusion (assuming that the other will become like us if given enough time and does not really deserve a separate label – as with 'semi-institutional welfare states' or 'catching-up countries') (cf. Dervin 2015, 3).

The notion of Nordic superiority has had its use as a nation-branding tool, but all researchers should be more aware of its political nature (Dervin 2015). Here, we have taken a step in this direction by examining European comparison and dichotomisation from the perspective of contemporary history and the genealogical approach, through a real-world example of how certain ideas become self-evident and end up acritically accepted in a given historical context. We do not deny the utility of typologies and categories in studying and interpreting the world. Rather, we call for a comparative approach aimed at understanding, not at generalising (Adcock 2006), and for studies designed to apply 'thick description' (Geertz 1973) rather than reductionist labels.

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