

Southern European Pathways across the Great Recession

By *Domenico Maddaloni**

The aim of this paper is to define a typology of individual and collective reactions to the Great Recession, which is affecting southern European societies from 2010. Building on A. O. Hirschman's attempt to frame individual and collective behaviors in response to a condition of decline, the paper maintains that they can be understood mostly in terms of a number of pathways based on different attitudes – exit, voice, loyalty, and neglect. In addition, R. K. Merton's social strain theory is used to clarify some aspects of the complex relationships between societal and cultural macrodynamics and micro reactions.

Keywords: *Crisis, Social Change, Southern Europe.*

Introduction

The public debate on the countries of Southern Europe is dominated by the widespread idea that these countries are experiencing a structural crisis. Seen from outside the area and from a macro perspective, this part of Europe is being presented as the region of the PIGS, a derogatory acronym by which many economic journalists and political analysts refer to these countries because of their economic and financial conditions. Since 2010 Portugal, Italy, Greece and Spain¹ undoubtedly show the lowest economic growth rates and the highest increase in the unemployment rate in all of Europe. Moreover, since many of these countries have a very high ratio of public debt to GDP and a very high incidence of protest movements against all the maneuvers suggested by international advisors to unblock the situation, many opinion makers tend to present them as incurably "sick" of "diseases" such as statism, familism and the quest for rent.

This public debate seems to be strongly influenced by the neoliberal discourse, which – at least in its most popular version, known as "the Washington Consensus" – identifies the United States and Great Britain as a paradigmatic institutional model for all countries of the world. Moreover, this neoliberal discourse maintains that the reforms implemented in these countries – starting from the Reagan Presidency and the Thatcher Government – are the only path possible for a country to adapt to the conditions created by globalization (Harvey 2007).

Alternative narratives show how the neoliberal discourse implies a set of

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¹ These countries are the most important in the southern European region and those, which the PIGS acronym refers. However, the region also includes small countries such as Malta and the republic of Cyprus.

public policies aimed at securing a growing share of income to capital, and a complete freedom of movement to financial capital. These changes are producing an erosion of the "European social model" – based on an active role of the State in the economy and welfare² –, and a growth in social and territorial inequalities. Moreover, since these changes are presented as inevitable and they are mainly imposed through non-democratic institutional mechanisms – such as the *memoranda* of the so-called Troika³ – they seem to produce also an erosion of democracy in most of Europe (Gallino 2011, 2015). Finally, in southern European countries such as Italy, the discrepancy between neoliberal discourse and neoliberal practices becomes even wider, since it leaves more and more room to the political class in relation to civil society, in a context dominated by the legacy of a divide between the rulers and the ruled (Maddaloni 2015).

The aim of this paper is to deal with the micro-social dimension of these changes. In which way do people living in southern European countries respond to this new Great Recession? Which kind of paths do they follow in order to adapt themselves or react to the crisis? In this paper, conceptual tools derived from the theories proposed by A. O Hirschman (1970) and R. K. Merton (1938, 1968: 185-248) will be used in order to give some answers to the preceding questions. In the following paragraphs, after a brief preliminary discussion on some concepts that define the paper's theoretical framework (those of 'Southern Europe', 'crisis' and 'typology') I will try to outline a social phenomenology of individual and collective responses to the crisis. In the conclusions, I will try to draw some implications from my line of argument and to outline a research agenda that could be helpful for a better understanding of our present and future.

Preliminary Questions: On Southern Europe, Crisis and Typologies

Before going further, it could be useful to discuss and clarify some preliminary questions. Is there an object of sociological analysis such as 'Southern Europe'? What exactly does the term 'crisis' mean? What steps must be taken in order to construct a typology?

Regarding the first question, it should be remembered that some scholars have supported the existence of an object of theorizing and research resulting from the aggregation of the southern European countries since at least the 1980s (Arrighi 1986, Leibfried 1992, Sapelli 1995, Ferrera 1996). Even scholars who looked at all (or almost all) the European societies in a comparative perspective found many similarities among the countries of the

² Current debates on economic growth and social welfare in the context of European Union usually share the view that – despite their differences – European States follow a general pattern – that is, the “European social model” –, based on a strong, direct commitment towards full employment, social protections for all citizens, social inclusion, and democracy.

³ The Troika is a tripartite committee, led by the European Commission with the European Central Bank and the International Monetary Fund, which has so far (July 2016) managed loans to the governments of Greece, Ireland, Portugal, and Cyprus.

South and some differences between them and the countries of northern and eastern Europe (Mendras 1997, Crouch 2000, Immerfall and Therborn 2010)⁴. Briefly, we can summarize these common features as follows: 1. a prominent role of traditional activities (agriculture, fishing, handicrafts, and labor-intensive industries) in the economic structure; 2. a deep socio-economic territorial dualism (developed regions vs backward regions); 3. the dominance of family capitalism and informal or irregular economy; 4. an authoritarian and post-authoritarian corporatist and clientelist polity.

In this regard, a frequent criticism of this line of comparative analysis maintains that many authors described southern European societies with reference to "a research framework dependent upon the normative narratives about the right or wrong path to European modernity" (Baumeister and Sala 2015: 9). On the contrary, in the post-World War II era, southern European countries obtained remarkable achievements in terms of level and quality of life, in some cases even surpassing the achievements of European countries conventionally regarded as "advanced". The persistent theoretical and political relevance of international debates on the concept of local development, mostly based on the Italian postwar experience (Kumar 1995: 37-39), can be seen as a good indicator of these successes.

Nevertheless, southern European societies now find themselves in trouble facing neoliberal globalization, more than other societies throughout Europe. This may be caused not just by globalization and neoliberalism in themselves, but also by the interplay among these global structural changes and the specific features of southern European social formations. These phenomena result in inefficiencies and inequities unknown elsewhere in the context of European Union: for example, the inability to provide equal employment opportunities (Maddaloni 2009) or to ensure protection from poverty (Ponzini 2008).

These comments lead us to discuss the concept of crisis used in this paper. At a first glance, and – again – from a macro perspective, that employed by Hirschman in defining the theoretical framework of his analysis, "crisis" may be seen as "a decline in the fortunes of individual firms" (1970: 3), as well as other organizations and States. This decline stems from "a gradual loss of rationality, efficiency, and surplus-producing energy, no matter how well the institutional framework within which they function is designed" (1970: 15). However, according to Hirschman's narrative, "the very process of decline activates certain counterforces" (ibid), even if these forces can go in different directions depending on the peculiar institutional environment and the risk/opportunities structure created in this context. Therefore, alongside the institutional forces that produce a lingering *loyalty* to the firm, organization or social system that is experiencing a decline, there are institutional forces that drive the actors involved in at least two directions. The first is *exit*, which is the escape from the firm, organization or system experiencing the decline. The

⁴ A further problem is to define the boundaries of southern Europe. Arrighi and Sapelli, for example, included Turkey in their definition. In this paper, I prefer to limit the analysis to the southern European countries that are EU members, and more specifically to the four largest countries (Portugal, Spain, Italy, and Greece).

second is *voice*, which is "any attempt at all to change, rather than to escape from, an objectionable state of affairs" (1970: 30), mainly through individual or collective movements of protest, aimed at reform or radical change of the institutional framework. In Hirschman's perspective, not only exit and voice are alternative options, but voice can be viewed – under some institutional conditions – as a function of loyalty. It is because we are consciously loyal to our firm / organization / social system that we struggle to put it back on track⁵. Later research on dissatisfaction in interpersonal relationships has added a new dimension to Hirschman's theory. *Neglect* "differs from loyalty in that it is not directed at recovery of the relationship. Rather, the individual responding with neglect implicitly accepts that recovery is not going to happen. Neglect may be shown by putting in less effort, not working at a relationship, and letting it fall apart" (Whitney and Cooper 1989: 522). Neglecters "let things go", even if it means that things will go away at last, because they are mainly affected by the costs and the efficacy of their responses.

Therefore, Hirschman's theory not only provides us with a definition of the crisis, but also a classification of the possible individual answers. The theory tells us that the incidence of these responses depends on the institutional context, and that they are mutually dependent. Finally, the theory predicts that the prevalence of the voice (based on loyalty) is essential for the recovery of the firm, the organization or the system experiencing the decline. Other types of change are possible: for instance, the bankruptcy of the firm, the breakdown of the organization, or the collapse of the social system.

A different narrative on the crisis may be found in the social strain theory by Robert K. Merton (1938, 1968 (it. tr. 1970: 297-401)). Merton analyzes individual responses to the mental and emotional strain derived from the imbalance between the goals culturally defined as socially acceptable for the individual's life, and the legitimate institutional means to achieve these goals. According to Merton, the imbalance is in the fact that all members of a culture share the same goals, but legitimate means are physically limited and unevenly distributed. This creates a pressure for *anomie*, and thus the spread of different types of non-conformity to the culturally and socially prescribed pattern. The first of them is *innovation*, consisting in the use of institutionally prohibited means to achieve the culturally prescribed goals. The second is *ritualism*, which is the implicit neglect of cultural goals while remaining bound by the institutional rules. The third is *retreatism*, which is the withdrawal from participation in the social system's life. Finally, *rebellion* is the attempt to replace the cultural goals and the institutional means with others – for instance, by means of a political revolution.

Merton states that *conformity* (to both goals and means) is the most common type of individual adaptation: "were this not so, the stability and continuity of the society could not be maintained" (1938: 677). A problem arises when *anomie* is "a consequence of the nature of the goals encouraged by

⁵ In addition, according to Hirschman an unconscious loyalty is possible, based on a missed or reduced perception of the general decline (1970: 91-92; more on this in the section 6 of the paper).

particular cultures. A highly materialistic culture [...] is prone to anomie, and hence to crime at all levels, not just among the relatively deprived lower classes. This is especially so if the goals of material attainment are extolled at the expense of consideration of the legitimacy of the means used to attain them" (Reiner 2007: 349-350). Even more so, if this (modern/ capitalist / neoliberal) culture, which "defines success almost exclusively in monetary terms" (ibid.), merges with a local culture based on a low civic (social and political) engagement. This is the case of southern European countries, compared with other European societies (Immerfall et al. 2010). Even more so, if these countries are experiencing a time of economic decline in which opportunities of access to institutional means are reducing. Therefore, Merton's social strain theory helps to identify the mechanisms – strain and anomie – through which the 'crisis', namely a societal decline, causes different individual responses.

This leads to a final preliminary question, concerning the methodological status of the exercise of classification outlined in this paper. Briefly, the aim of this attempt is to recognize, differentiate and understand an object such as the responses of individuals living in southern European countries to the current crisis, caused by the growing impact of neoliberal globalization on these "semi-peripheral" social formations. This attempt may result in a typology, which is a list of categories that allow simplifying the social complexity aggregating the concrete cases under investigation by means of a variety of *fundamenta divisionis* (Marradi 1990, Bailey 2000). The combination of these principles and aggregation criteria allows the distribution of all possible cases in a limited number of classes or types. Therefore, the aim pursued in this conceptual exercise is descriptive, comparative and understanding-oriented, but it is not explanatory in the sense of a direct search for a causal explanation (Lozares 1990). Moreover, it is true that a good typology can offer a "firm foundation (...) for both theorizing and empirical research" (Bailey 2000: 3188). Nevertheless, a typology is always the result of an (unavoidable) process of "grouping of entities on the basis of similarity" (ibid.: 3180), in which some relevant information may be lost. Typologies do not necessarily match anything or anyone in the real world.

Finally, the usage of Hirschman's theory as a basis for this exercise can be seen as rather un-orthodox in a social research methodology perspective. "Any classification must be mutually exclusive and exhaustive. This requires that there be only one cell for each case" (ibid.). However, Hirschman's categories of exit, voice, loyalty and neglect are interrelated. For instance, voice – or at least some kinds of voice, as we shall see later – may be a function of loyalty (Hirschman 1970: 77-92). In other words, an individual may participate in a protest movement *just because* he or she is loyal to the organizational or societal order. Sometimes exit and voice are not alternative, but complementary reactions to the decline, as it apparently was in the case of German Democratic Republic (Hirschman 1993). While this sheds light on the dynamic character of Hirschman's theory, it can create problems when trying to frame his contribution from a methodological point of view. One way to escape this

difficulty lies in recognizing the complexity of the social world, whose states do not change discretely, but through the build up of small modifications. In the social world, the categories identified by the researcher gradually fade into one another, and this may explain why we have always disputed cases.

Moreover, the attempt of classification presented in this paper refers to lifestyle choices of individuals who are facing the rhetoric and practice of a whole social system – "the new neoliberal southern Europe" –, not to easily reversible behavioral choices. This happens, for instance, when Hirschman's typology is used to analyze the electoral market in a strictly political science perspective, so that "exit" is defined as abstention, and "voice" as blank and null ballots, or voting for new parties (Lago et al. 2007). The choices to emigrate, to participate actively in a protest movement or an anti-system party, or to experience an alternative way of life – some of the behaviors that I shall examine later – seem much more costly and challenging than the decision to abstain or cancel the ballot in some election. Therefore, even if some of the categories in this typology are mutually dependent and fade into one another, and although some empirical cases may be included in multiple categories, the intention of producing an exhaustive categorization is alive and well.

Exit Pathways: Migration, Self-Marginalization and Intentional Communities

Exit-oriented pathways seem to be very important individual responses to southern Europe's Great Recession. The first of them is, of course, *emigration*. There is ample evidence of the fact that migration from the countries of Southern Europe is now an established phenomenon. This new migration involves not only foreigners leaving their previous host societies because of the crisis, often moving towards other destinations in the EU context (Triandafyllidou 2013), but also young and adult citizens of southern European countries. For example, according to Eurostat, in 2013 the net balance between emigrant and immigrant citizens of the four Southern European countries was 168,693 persons, while the total number of emigrant citizens was 268,348 (32.4% of all emigrants). Moreover, there is a growing empirical evidence that many emigrants are high-skilled people, and that their decision to migrate is driven by a sense of relative deprivation because of the crisis and by a frustration with the life conditions in their home countries (Alba et al. 2013, Triandafyllidou and Gropas 2014). At the same time, this migration also depends on a vision of life in which mobility and new experiences are valued positively (ibid.). In this context, the migrants' educational and occupational resources help to protect them from the threat of unemployment. Their reluctance to use the crisis as a reason to leave is part of their attempt to rebuild a set of symbolic and social ties just through international mobility and a "new beginning" abroad⁶ (Bygnes 2015). Nevertheless, this vision of the life turns into an increasingly widespread choice of emigration just because the crisis

⁶ The obvious implication of this argument is that southern European medium- or low-skilled migrants (as well as non-migrants) are more exposed to the risk of anomie.

seems to magnify the "push" factors at work in the southern European countries.

Other exit-oriented pathways are possible, however. Migrants exclude themselves *physically* from participating in the social life of their home country. Even in the age of transnationalism (Vertovec 2009), they have fewer chances to participate compared with residents. It is possible, however, to imagine a pathway leading to a *mental* self-exclusion (or self-marginalization) from the society. Here Merton's theory can be helpful: when discussing the syndrome he calls "retreatism", he describes it as typical of people who "are, strictly speaking, *in* the society but not *of* it. Sociologically, these constitute the true 'aliens'. Not sharing the common frame of orientation, they can be included in the societal population merely in a fictional sense. In this category are *some* of the activities of psychotics, psychoneurotics, chronic autists, pariah, outcasts, vagrants, vagabonds, tramps, chronic drunkards and drug addicts. These have relinquished, in certain spheres of activity, the culturally defined goals, involving complete aim-inhibition in the polar case, and their adjustments are not in accord with institutional norms" (1938: 677; italics by the author).

Individuals with mental problems or having alcohol or drug addiction are increasing in this age of crisis, especially if we include people into depression in this category of "retreatism". Unfortunately, recent comparable data on the incidence of these phenomena in the population of European Union member states are not easy to find⁷. A large stream of social research, however – starting probably from the famous inquiry on the unemployed of Marienthal (Jahoda et al. 1991) –, shows clear and unambiguous evidence of the increase of these phenomena in tough economic times. Furthermore, the World Health Organization states that today "Mental ill health accounts for almost 20% of the burden of disease in the WHO European Region"⁸.

Nevertheless, neither mental illnesses, nor drug addiction or alcohol abuse can be seen as *choices* for southern European individuals facing neoliberal globalization. They are rather the outcome of a process of marginalization suffered by some of them. These people, then, are those who pay the highest price for the increasing anomie that occurs in the southern European societies today. They are the *victims*, of both neoliberal globalization *per se* – with its highly materialistic and individualistic values – and the impact of this on semi-peripheral social formations – with their historical heritage of authoritarianism, clientelism, patriarchal familism, and deep social and territorial inequalities.

If we are looking for a *true* social/cultural self-exclusion (or self-marginalization), we could have more success if we look at the revival of communitarian movements. Today they call themselves *intentional communities*, in the sense that they intend to promote cooperative culture and sustainable living. A list of these experiences can include "ecovillages,

⁷ The last comparable data are from the 2008 *European Health Interview Survey*. New statistics, regarding a 2013-2015 survey, will be available only in December 2016. Retrieved from <http://bit.ly/2atXKdK> [Accessed 14 April, 2016].

⁸ Retrieved from <http://bit.ly/2b21XHp>. [Accessed 14 April, 2016].

cohousing, residential land trusts, income-sharing communes, student co-ops, spiritual communities, and other projects where people live together on the basis of explicit common values"⁹. The website of the movement has a *Communities Directory* showing that several countries are involved, including all the southern European ones¹⁰. An important point can be made here on the inclusion of this kind of choice into the general category of exit responses. Although participants in these experiences may present themselves as actively involved in a project of general transformation of the society, this kind of project is perhaps more an attempt to reconstruct their individual lives. This attempt involves both new social ties – ties that were not present before, and which are based on different principles and cultural values – and a withdrawal, as much as possible, from any contact with the social system. This pathway has, therefore, something in common with emigration, and they both can be seen as varieties of "retreatism" not explicitly included in Merton's theory.

Voice Pathways: Dissent and Rebellion – Against What?

Regarding the paths oriented to *voice*, Hirschman's analysis is based on the functionalist idea that voice is a "recuperation mechanism" (1970: 30) that allows the recovery of a firm, an organization or a social system in crisis or decline. Moreover, his direct and explicit treatment of voice as an option in the political arena is heavily influenced by democratic pluralist theories that were dominant in North American political science of those times. It is not surprising, therefore, that – other things being equal – Hirschman regards voice as a function of loyalty (ibid.: 77-92). In our case, the more a citizen sees himself or herself "loyal" to his / her country, the more he / she can act in order to restore its position and its image in the world trying to influence political decisions in the direction that he or she will believe as the most appropriate.

This view, however, seems too simple when applied to the crisis or decline of a whole, complex society. There is no identity of views on the direction to consider the most appropriate, and this is because those who seek a way out are in different personal and social conditions. Their experience of the anomie induced by both the individualistic and materialistic character of neoliberal globalization, and the crisis of southern European semi-peripheral societies will be different. If voice can be seen as a function of loyalty, to what exactly participants in protest movements are loyal?

Merton's social strain theory may be helpful on the point. We can have a *rebel* voice, an *innovative* voice, and even a *conformist* voice. We can have a rebel voice, when people is active in movements aimed at substituting both cultural goals and institutional means with others. This kind of anti-systemic

⁹ *Welcome to the Fellowship for Intentional Community*, Retrieved from <http://www.ic.org>. [Accessed 14 April 2016].

¹⁰ Retrieved from <http://bit.ly/2ax8v2v>. [Accessed 14 April 2016]. The number of the communities in these countries however, is very small when compared with that of United States.

movements (Arrighi et al. 2000) have now lost the past certitudes on a socialist future and see themselves more as antagonist movements (Hardt and Negri 2004), facing the global capitalist system. Their discourse, therefore, is more on this global system as a whole – seen as a new kind of Empire (Hardt and Negri, 2003) – than on the crisis in southern Europe. In this context, they struggle for a restoration and a renewal of "the commons", a notion that includes not only natural resources but also languages, social practices and modes of sociality (Callinicos 2010, see also Hardt and Negri 2010). *Syriza* in Greece, and *Podemos*, in Spain, gained a considerable success¹¹ defending a political line apparently close to that described by Hardt and Negri. Since 2010, they followed the wave of protests aroused by the austerity policies imposed by the Troika to southern European countries with the consent of national governments. There is little doubt that, from the point of view of the militants of these movements, the decision to support them is costly and difficult. Moreover, this personal choice may involve both the creation of new ties and the attempt to reconstruct the structure of the whole society on a new basis. A simple voter, however, can consider choosing to vote for these parties as something different from a stable reaction to the crisis. Finally, the recent experience of the Syriza government in Greece has shown that it is difficult to meet the widespread expectations for a radical change, since its attempt to renegotiate the conditions imposed by the Troika and boost the Greek economy with a higher government spending has resulted in a failure.

As for what can be seen as innovative voice, it is important to note that, in Merton's schema, "innovation" plays a major role as a category which includes behaviors widely recognized as deviant, even criminal. Innovation means "the use of frequently proscribed but frequently effective means of attaining at least the simulacrum of the culturally defined success – wealth, power, and the like" (1938: 678). In this paper, a rather different use of this category can be introduced. If the "social system" is the whole set produced by the graft of neoliberal globalization in semi-peripheral social formations – with their historical legacy of authoritarianism, patriarchy, familism, and political patronage –, then "innovation" may consist in a partial redefinition of cultural goals and/or institutional means. In the case at issue, this may be a rejection of materialistic values in favor of post-materialist ones – mutualism, social self-organization, and an ecologically sustainable life¹². Moreover, innovation may consist in a refusal of particularistic rules and resources in favor of universalism – that is, the "rule of law" and really equal opportunities for all. In this case, the protest movements arise upon the claim to change more the society in which they operate, than the global system as a whole¹³. The Italian *Movimento 5 Stelle* (5 Star Movement) can be seen as an important

¹¹ These parties got, respectively, 35.5% and 20.7% of the votes at the last general elections, held in September 2015 in Greece and in December 2015 in Spain.

¹² Note that, from Herbert Spencer's times onwards, these values are widely seen as highly compatible with liberal individualism.

¹³ These factors are at work also in the choice of supporting the anti-systemic movements mentioned above. In those cases, however, they are only a part of a more general, anti-capitalistic discourse.

representative of this category. The peculiar character of this movement can be highlighted by the meaning of the 5 stars of its name: public water, sustainable mobility, local development, Internet connectivity, and environmental protection. More than on its program, however, the political fortunes of the *5 Star Movement*, which gained 25.5% of votes in the 2013 general election, seem to be based on two main factors. The first is the proposal of innovative forms of political participation (Biorcio and Natale 2013, Biorcio 2015a, 2015b). The second is the protest against the arrogance and corruption of the Italian political class (Maddaloni 2015).

Finally, we may have a conformist voice. This kind of loyalty refers to the social system as it is now, with its contradictory assortment of cultural goals and institutional means. This kind of loyalty, thus, may come from people affected by the crisis, but willing to charge its costs on other groups. They try to defend their social ties, cultural values and economic resources by excluding others, perceived as outsiders, from the shrinking benefits of the societal inclusion. Thus, they strive not to re-define cultural values and/or institutional means, but the boundaries of what can be perceived as "our society" (our group, our nation, our country) (Bauman 1999). The anomie reduction processes at work here relate to a combination of stereotypes, prejudices and rational calculations about the costs and benefits of public policies (Markaki and Longhi 2012). This may well be the case of southern European societies, since a growing literature (starting perhaps from Dal Lago 1999) shows the emergence of parties and political entrepreneurs indicating the potential enemy in immigrants – the outsiders by definition –, and the common good to "protect and serve" in the whole country's historical, religious and linguistic heritage. How much this legacy is actually shared by "the whole nation" is an entirely open question, however. In southern European countries there is a major political problem concerning ethnic minorities and regional imbalances.

The electoral success of anti-immigrant movements is still very narrow, with the exception of Italy, where *Lega Nord (Northern League)* – a supposedly independentist party, whose political discourse is not only anti-immigrants but also anti-southerners (Diamanti 1996, Biorcio 2010, see also Biorcio 2015a) – gained 6.2% of votes in the 2013 general elections¹⁴. Another exception is Greece, where a party called *Golden Dawn (Chrysi Avghi)* gained recently 7.0%. This party tries to capitalize the growing anti-system attitudes of the Greek electorate, severely affected by the economic crisis, by means of violent tactics and a strong nationalist and anti-immigrant propaganda (Bistis 2013, Dalakoglou 2013, Ellinas 2013). Nevertheless, neither the Northern League in Italy nor Golden Dawn in Greece seems to be close to a non-shared, unchallenged political power. Today, southern European citizens seem still more prone to blame their governments, rather than immigrants, for the crisis and its consequences on their lives – the rising unemployment, the retrenchment of public welfare and services, and the growth of poverty. However, the situation may change, especially in Greece and Italy, because of

¹⁴ The party reached 15.6% in Veneto and 14.6% in Lombardy, two developed regions in northern Italy.

the waves of refugees now (2015-2016) coming from the countries of the Middle East and North Africa¹⁵.

Loyalty Pathways: Innovation, or Taking Neoliberalism Seriously, Conformity, or Neo-Liberalism in Particularistic Sauce

Having defined voice partly as a function of loyalty, we can now focus on loyalty in itself. Two kinds of loyalty, thus, are possible. *Innovative loyalty* refers to proactive responses to the crisis, based on such concepts as self-responsibility, activation, creativity, and entrepreneurship. Innovative individuals, therefore, seem to take neo-liberalism seriously, trying to create a job by themselves without necessarily referring to their particularistic ties (such as their family relationships) or the public sector help. Organic farming, quality artisanship, new technologies, personal services and the nonprofit sector are the areas where these people, especially young people with higher education, create new jobs. Moreover, a survey held in Puglia – a southern Italian region – just before the crisis, showed that the above mentioned values are often linked to some kind of *social* engagement in these innovative pathways (Ingellis 2015) – for instance, in anti-racket or pro-environment associations. This can easily lead to some form of *political* engagement in the directions previously discussed. Even more so, because many of these initiatives are not able to survive without the support of an institutional network, which can be created by means of active local development policies (Di Modugno and Ingellis 2007).

Another social force leading to innovative loyalty are immigrants, especially immigrant entrepreneurs. Mainstream sociological literature describes this group using categories like those of "ethnic niches" and "middlemen markets", but some authors show that other strategies of economic and social insertion are possible. Southern European semi-peripheral societies, for instance, offer many examples of low threshold markets, "where entrance rules are either inclusive, or, if exclusive, are enforced only loosely" (Engelen 2001: 216), especially because of a high social and cultural embeddedness of these markets. A large informal economy – a typical feature of southern European societies – may improve, then, the opportunities for immigrant entrepreneurship, and broaden the range of response strategies to the Great Recession. Immigrant entrepreneurship and self-employment, however, can be seen not only as pathways of integration in the whole society "as it is" (Ålund 2003). Immigrant enterprises depend on the risk/opportunities structure in the host societies. In turn, this structure is tied to the local institutional framework, with particular reference to access to citizenship, residence permits, the labor market, social services, housing, and credit. Immigrants, therefore, may turn themselves in a political actor, thus escaping an actual condition of subordinate inclusion in the southern European semi-peripheral societies (Avallone 2013,

¹⁵ There is evidence that the size of immigrant population can affect the rise of anti-immigrant attitudes in European countries (Markaki and Longhi 2012).

see also Blanco et al. 2016, Tomei 2016).

Whilst innovative voice and innovative loyalty may sometimes overlap, however, it seems that there is less room for this overlapping between conformist voice and *conformist loyalty*. In the context of a semi-peripheral society in crisis, conformist voice pathways are those followed by people who perceive growing risks of being crowded out by structural changes, and react to them by implementing practices aimed at the exclusion of other groups, perceived as different or strangers. Conformist loyal pathways, instead, are those followed by people who still feel at home in the social system "as it is". This may be because they are able to use their particularistic ties to take advantage of the opportunities offered by neoliberal globalization – for example, the privatization of public industries and public services, or the access to soil exploitation rights. Therefore, those who do not perceive anomie – as they continue to draw benefits from the status quo, in terms of power, wealth or prestige – may choose this path. The number of people still capable to follow conformist loyal strategies should not be underestimated. For instance, a recent estimate of those involved in politics (*lato sensu*) in Italy states that they are over a million, more than 5% of total employment (Bagnasco 2015). However, the deepening of the crisis could lead to a growing discontent, and therefore to a shift of many loyal conformists in other directions.

Neglect Pathways: Ritualism

Finally, a *neglect* pathway can be outlined. When Hirschman discusses the functioning of advanced capitalist democracies, such as that of United States in the 1960s, he highlights the role played by the passive acceptance of the social and political order for an effective government. Following the line of argument developed by pluralist democratic political science, he states that political apathy can be useful because the democratic system is based on the alternation between the roles of voters and policy makers. Moreover, the eventual awakening of citizens from apathy provides the political elite a clear signal about the direction to take (1970: 32).

A problem arises, however, when a crisis begins, but citizens do not react. In order to overcome this difficulty, Hirschman refers to an "unconscious loyalty" that could be the result of a missing or reduced perception of the organizational/systemic decline (*ibid.*: 91-92). As we have seen before (see section 1), social-psychological research on interpersonal relationships has offered perhaps a better understanding of this kind of behavior. Neglect does not imply individual misperceptions of the overall social conditions; rather a cost/benefit analysis of different courses of action is put into practice and results into a passive acceptance of things "as they seem to be"¹⁶. Merton's social strain theory may capture this pathway by means of the concept of

¹⁶ Misperceptions, indeed, can affect the individual's choice even in this case. They refer not to the overall social conditions but to his /her cost/benefit balance.

ritualism. In Merton's words, "an extreme assimilation of institutional demands will lead to ritualism wherein the goal is dropped as beyond one's reach but conformity to the mores persists" (1938: 678). In the case discussed here, "conformity to the mores" may be seen as the attempt to defend the social status and the living standard inherited from previous generations, and the goal dropped can be identified, instead, in the social mobility blocked because of the structural crisis.

This can be especially the case of the southern European middle classes, who received large benefits from the economic growth and the social and cultural modernization occurred in the period following World War II. An emerging stream of research describes the strategies by which individuals and families – especially from middle or lower-middle classes – try to defend their social position and purchasing power (for the Italian case, see for instance Secondulfo 2015, for the Spanish one, see for instance Calderón et al. 2016). Consumers faced with shrinking incomes spend their savings, go into debt, sell their (mostly inherited) family assets, change the stores where they shop, do anything to keep their standard of living unchanged as long as possible. Moreover, the concept of neglect can help to identify two other mechanism at work, in the case of ritualism as a response to the crisis. The first is a certain lack of confidence in the ability to change the course of events by means of participation in a collective action. The second is a real or perceived inability to change, at least, the course of one's own life. Even in the case of ritualism, however, the deepening of the crisis could push people to make different choices.

Conclusions

As a final remark, we can ask ourselves to what extent the typology outlined above is suitable to the case of southern Europe. Does the typology capture the specificities of the southern European pathways across the Great Recession? The nine behavioral paths identified on the basis of the four fundamental attitudes of exit, voice, loyalty, and neglect can be found also in other countries.

A possible answer may be that, at a first glance, what is specifically southern European in this exercise is the *relative importance* of each pathway. This can be true for the main exit response – emigration¹⁷ – but also for at least one of the voice responses – innovative voice. In turn, this leads to ask if the differences between innovative, rebel and conformist voice, or between innovative loyalty and conformist loyalty, are so strong in other countries. Following this line of analysis, therefore, we can perhaps come to throw new light on the problem of southern Europe as an object of social-historical research, separate from other European macro-regions.

This can allow us to outline a possible agenda for future research. A first

¹⁷ The available data on alcohol consumption may instead give us the idea that the self-marginalization response is more widespread in eastern Europe.

task may be to assess the reliability of this typology and its ability to cover effectively all the individual responses to the crisis. A second task may be to measure the absolute and relative frequency of each response, identifying their structural causes and their micro-sociological and psychological mechanisms, and assessing the interactions between all the possible pathways.

Finally, a third task may be to assess the effects of these responses – that aggregate in collective behaviors and sometimes give rise to social movements and political parties – on the stability and the prospects for change in each of the countries affected by the Great Recession. Under this perspective, a hypothesis can be advanced about the importance of innovative voice and rebel voice for the building of a more democratic polity and more egalitarian societal institutions in southern European countries. Should this not happen, the overcoming of the crisis could only depend on an unlikely change in the structural trends that are pushing these countries to the periphery of the global system.

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