

Introduction to the special issue: Justice and solidarity in Europe

Andrea Sangiovanni & Juri Viehoff

To cite this article: Andrea Sangiovanni & Juri Viehoff (2023) Introduction to the special issue: Justice and solidarity in Europe, *Review of Social Economy*, 81:1, 1-7, DOI: 10.1080/00346764.2023.2168037

To link to this article: <https://doi.org/10.1080/00346764.2023.2168037>



© 2023 The Author(s). Published by Informa UK Limited, trading as Taylor & Francis Group



Published online: 16 Feb 2023.



Submit your article to this journal [↗](#)



Article views: 2352



View related articles [↗](#)



View Crossmark data [↗](#)

Introduction to the special issue: Justice and solidarity in Europe

Andrea Sangiovanni^a and Juri Viehoff ^b


^aKings' College London, London, England; ^bMANCEPT, University of Manchester, Manchester, UK

ARTICLE HISTORY Received 19 December 2022; Accepted 20 December 2022

Introduction

Publics across Europe increasingly feel that the European Union (EU) undermines the problem-solving capacities of its member states – particularly in social, welfare, migration, and labour policy – and increases inequality both within and across them. As a result, the EU in general, and specific institutions within it, strike many as standing in need of significant reform. This raises various questions: Which areas of EU policymaking and which specific institutions need to be reformed? What standard of assessment should guide us in formulating alternatives? More abstractly, what principles of socio-economic justice and solidarity, if any, apply at the EU level and how can these principles inform policies and institutional design proposals? Over the years, much has been written on the democratic deficit of the EU. But much less has been written on *substantive* (as opposed to procedural) normative standards. Even fewer authors have sought to bring together substantive moral analysis with concrete, empirically grounded policy suggestions. The goal of this Special Issue is to remedy both the lack of theorizing of justice and fairness in relation to the EU, and to make some headway in bridging the gap between normative, philosophical perspectives, and empirical analysis. To this end, the issue puts into dialogue political theorists and philosophers with more empirically minded researchers working in political science, sociology, and political economy to critically and constructively analyse the EU's major institutions.

In terms of topic area, all these essays can be thought of as contributions to the investigation of the EU's evolving 'economic constitution'. Sometimes this engagement occurs indirectly and at a level of theoretical and philosophical abstraction, as when authors seek to determine the best interpretation

CONTACT Juri Viehoff  juri.viehoff@manchester.ac.uk  MANCEPT, University of Manchester, Oxford Road, M13 3PM Manchester, United Kingdom

© 2023 The Author(s). Published by Informa UK Limited, trading as Taylor & Francis Group
This is an Open Access article distributed under the terms of the Creative Commons Attribution-NonCommercial-NoDerivatives License (<http://creativecommons.org/licenses/by-nc-nd/4.0/>), which permits non-commercial re-use, distribution, and reproduction in any medium, provided the original work is properly cited, and is not altered, transformed, or built upon in any way.

of political values like equality, collective autonomy, or (republican) freedom under conditions of intense supranational institutional entanglement (e.g. in the works of Follesdal and de Schutter). At other times, the project is advanced by more empirically oriented analysis that investigates, in one way or another, those sociological, political, and economic conditions necessary for the proper functioning of institutions and the realization of moral ideals at the supranational level (Schelkle, Ferrera, Bellamy, and Kröger). And finally, a third group of authors look specifically at the one part of Europe's economic constitution that has generated most public and academic debate and brought to the fore serious chasms between member states: the Eurozone and its monetary policy regime (Dietsch, Merlo). These pieces move the debate into more applied and non-ideal territory by investigating normative issues with a clear view of institutional design.

Across these three focal areas, most authors adopt the language of solidarity over and above the more 'mainstream' notion of distributive justice or institutional fairness. This should of course not be very surprising given the centrality of 'solidarity talk' in both public debates about European integration, and in the EU's official documents (e.g. Articles 2 and 3 of the Treaty of European Union that mention solidarity). But it seems to us that solidarity as a concept also plays a very useful *theoretical* function in the context of our attempt to put empirical and normative work in dialogue: Some contributors treat solidarity as a neutral term to describe these empirical prerequisites for justice, legitimacy, or autonomy amongst EU citizens and member states to be attainable. Others, by contrast, deploy the language of solidarity in a richer, more evaluative sense to designate the hoped-for state of affairs in which fairness and distributive justice are realized. We think that, rather than sowing confusion, this bifocal use of the concept of solidarity throughout this issue may allow empirical and normative perspectives to inform each other and guide further inquiry: On the one hand, the concept's historic tradition and evaluative connotations challenge those working on the empirical prerequisites of cooperative behaviour to clarify how solidarity differs from self-interested attitudes that inform, for example, decisions to engage in mutually beneficial insurance (Schelkle). But on the other hand, empirically focused chapters on solidarity as a sociological phenomenon remind those addressing normative issues to be mindful of the question what actually grounds richer solidaristic attitudes.

The first two contributions, by philosophers working on justice beyond the state, address the role of two central values that any liberal theory of justice must respect: equality and autonomy. Whilst much philosophical reflection has gone into how these values can be reconciled in a unified theory of justice at the domestic level, the EU, as a complex novel polity arrangement, requires us to rethink how such a balance ought to be struck once questions of collective autonomy (i.e. self-determination) and equality amongst

collective agents (i.e. member state equity) need to figure in our normative assessment.

Andreas Follesdal, in his 'A just yet unequal European Union: a defense of moderate economic inequality', attempts to vindicate the view that whilst the EU should reduce cross-national economic inequalities among inhabitants of different member states, it is not required, as a matter of justice, to bring about full economic distributive equality. Follesdal rejects such a Rawls-inspired interpersonal or state-level European 'Difference Principle' in order to respect member state choices regarding the structure of domestic welfare states. He first positions the question relative to arguments for a European universal income and accounts for the special features of the EU before suggesting that contractualist arguments against certain forms of economic inequality do not establish a definitive requirement of full equalization across borders. Having identified some reasons for a fair (equal) distribution of benefits of social cooperation, he goes on to argue that these reasons for economic distributive equality must be weighed against more political influence over matters controlled by the individual's sub-unit (i.e. member state), thus striking a balance between distributive equality and collective autonomy.

Helder De Schutter's contribution, entitled 'Solidarity and autonomy in the European Union', aims to determine at which level a particular policy domain ought to be governed: he calls this the normative issue of levelism. De Schutter articulates and defends two normative principles that ought to govern levelism for distributive justice in the European Union. According to the *Highest-Level Solidarity Principle*, we should transfer distributive solidarity to the highest level of the multilevel polity. In the EU, this is the EU-wide level. According to the *Policymaker Pays Principle*, policymaking and funding should be located at the same level: the level that makes the policy should also be the level that funds the policy (assuming background conditions of justice apply). De Schutter's conclusion is that, since the funding for core redistributive projects should be Europeanized, and since funding and policymaking should be allocated to the same level, we have a *pro tanto* reason to Europeanize both the funding and the policymaking over core redistributive powers.

De Schutter's conclusions stand in contrast to Bellamy and Kröger's project, according to which the EU would become a fairer institutional arrangement if it allowed for differentiated integration: Differentiated integration (DI) describes an institutional mechanism whereby some member states opt out or are excluded from certain common EU policies for sovereignty or capacity reasons. DI is thought by some to undermine the EU's functioning as what John Rawls called a 'fair scheme of cooperation', grounded in norms of impartiality and reciprocity. Bellamy and Kröger reject this claim and aim to show that different forms of DI can be compatible with fair cooperation in two senses developed by John Rawls. First, it can establish fair cooperation between states on the model that Rawls put forward in his *Law of Peoples* (2001). Second, it can also

advance fair cooperation among citizens on the model of Rawls' two principles of domestic justice developed in his *Theory of Justice* (1971). Bellamy and Kröger suggest that the EU has features of both these models because it is an international union of states and a supra- and trans-national union of citizens. Based on this characterization of the EU they defend the coherence of this combination and contend that DI can provide a justified mechanism for balancing the demands of fairness between *states* and fairness between *citizens* (both within and across states).

The next two pieces move towards the empirical analysis of when and how solidarity and redistributive justice may be possible amongst a group of economically heterogenous member states and their increasingly diverse populations. The institutions that make up the Eurozone, and indeed the historical events of the Eurozone crisis of 2009–2012, play an important role in both arguments. Waltraud Schelkle asks how the inherent norm of integration, notably the norm to share risks among member states in good faith, can become a self-sustaining practice amongst European states. She addresses this question in a two-fold manner by looking at it both in the abstract and in relation to a critical case of a divisive institution, namely the evolution of sovereign bailout funding in the Euro Area since 2010. Schelkle maintains that community building between states is a potential *outcome* of solidaristic practices, reinforced by positive feedback processes. Inspired by Stone's (1999) work on insurance, she demonstrates that there are social mechanisms at play that favour the secular expansion of risk sharing between states.

Maurizio Ferrera's contribution 'The European Union and cross-national solidarity: safeguarding "togetherness" in hard times' complements Schelkle's analysis. According to Ferrera, the EU is a new form of political organization which can be defined as an 'experimental polity'. Its distinctiveness lies in a novel assemblage of the constituent elements of polity (boundaries, binding authority, and bonding ties), and in the constant testing of new combinations of such elements when facing functional and political challenges. Experimentalism is not always successful and can occasionally trigger dynamics of polity disruption. The paper discusses two instances of 'bad experiments' along the bounding and binding dimensions, i.e. Brexit and the Euro crisis. It then focuses on the Covid-19 crisis and shows that in this case, EU leaders were able not only to launch an ambitious plan of response based on joint action, but also to re-establish an 'ethos of togetherness' among the member states, on which it can build for securing both social solidarity and political stability.

The final two pieces of the special issue look directly at the Eurozone crisis. In his article 'Self-fulfilling crises in the Eurozone and the institutional preconditions of republican sovereignty', Stefano Merlo brings together concrete institutional analysis with questions of republican freedom that were discussed more theoretically by Follesdal, De Schutter, and Bellamy and Kröger. His main contention is that the normative vocabulary of republican political theory can

be fruitfully applied to evaluate the phases of market turbulence in sovereign debt markets witnessed during the Eurozone crisis, that is, a view of justice that requires the minimization of dominating relationships between agents highlights how the institutional preconditions of undominated sovereignty were lacking in the Eurozone. Analysing the Eurozone as a historical case study, Merlo shows that the agreed-upon structure within which countries operated fuelled self-fulfilling market movements in sovereign bond markets, which bore the hallmark of unjust domination: weaker member states formed a social relationship with investors over which they did not have meaningful control. In motivating this thesis, Merlo's article touches upon the recent debates on the sources and sites of domination and on the stance that republican scholars should take toward competitive markets. Given his diagnosis, Merlo, unsurprisingly, concludes that Eurozone countries have an obligation to establish supranational institutions that increase private and public channels of risk sharing.

Peter Dietsch's contribution 'Designing the fiscal-monetary nexus: policy options for the EU' constitutes the final piece in this Special Issue. It is in certain respects the most policy-minded contribution: His initial observation is that in recent decades – and in particular since the shift towards independent central banks – there has been no explicit coordination of fiscal and monetary policy. Dietsch argues that in the Eurozone, this lack of coordination represents an important flaw, especially since the Eurozone is not an optimal currency area. Complementing the monetary union with a transfer union represents one possible solution. He then suggests that the negative impact of post-2008 and post-Covid-19 unconventional monetary policy on income inequalities provides a second reason for coordinating fiscal and monetary policy. Among various institutional arrangements to implement such coordination, he defends the idea that the European Central Bank should be sensitive to distributive considerations when formulating its monetary policy. Such an arrangement would help both to contain the distributive side-effects of monetary policy and to at least partially remedy the flaw at the heart of the Eurozone, as long as an outright transfer union remains unfeasible.

We want to close this Introduction by reflecting briefly on potential further avenues for research into justice and solidarity at the European level. One first observation is that there still remains a 'theory gap' when it comes to theorizing justice and fairness for the EU. Whilst there are numerous well-developed, competing theories of justice for domestic and global justice, the EU, as a novel and form of political cooperation, does not have a developed corpus of competing theories of justice or fairness. As questions of European integration are increasingly politicized (and rightly so!), there is still much work to be done for political theorists to put forward more detailed and worked-out theories for this unique institutional formation.

Secondly, the motivating idea behind this Special Issue, we suggested above, was to both showcase *substantive* normative theorizing about specific areas of European integration and to bridge the gap between empirical and normative research on these topics. Perhaps most obviously, there is much more work to be done that brings together empirical analysis with normative assessment beyond the confines of Europe's economic constitution and, specifically, the Eurozone and its consequences. For example, the EU's role in intra-union and external migration seems a topic ripe for more extensive collaboration and reciprocal engagement between normative theorists, economists, and other social scientists – not least because of the topic's salience with European citizens, as the Brexit vote so plainly revealed.

Finally, it is worth pointing out that almost all contributions to this Special Issue grew out of contributions to a workshop held at the European University Institute in Florence in the summer of 2019. Although some contributors chose to integrate pandemic-related observations in their subsequent articles, it is revealing how different everybody's view on what constitutes Europe's most pressing political problems was then as compared to now (2023): Three years of global pandemic, and, more recently, Russia's war of aggression against Ukraine, have brought home how much policy areas that have not been high up on the integration agenda – first and foremost healthcare and European military cooperation – merit our attention and critical scrutiny. This insight does not, of course, change or invalidate how we should think about social justice and solidarity in the process of European integration (if anything, these events demonstrate how important a well-functioning, fair EU is in light of the challenges that its member states face!). But perhaps these recent events help to broaden the range of values and topics that EU scholars, both normative and empirical, will focus their future work on.

Disclosure statement

No potential conflict of interest was reported by the author(s).

Funding

This work was supported by HORIZON EUROPE European Research Council: [Grant Number 771635].

Notes on contributors

Andrea Sangiovanni is Professor of Philosophy at King's College London.

Juri Viehoff is lecturer in political theory and the University of Manchester.

ORCID

Juri Viehoff  <http://orcid.org/0000-0002-5763-0279>

References

- Rawls, J. (1971). *A theory of justice*. Belknap Press of Harvard University Press.
- Rawls, J. (2001). *The law of peoples*. Harvard University Press.
- Stone, D. A. (1999). Beyond moral hazard: Insurance as moral opportunity. *Connecticut Insurance Law Journal*, 6(1), 11–46.