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# Debating fiscal solidarity in the EU: interests, values and identities in the legitimisation of the Next Generation EU plan

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## ABSTRACT



The article departs from the assumption that issues of member state solidarity, particularly in crisis moments, undergird the stability of the EU by holding the key to its legitimisation. Against this background, the article employs the tools of discourse analysis to study how European executives deliberated over the institution of new mechanisms of fiscal solidarity in response to the outbreak of the COVID-19 crisis, as well as how they later legitimised the agreed mechanisms. Having coded 1,143 quotes from 21 office-holders drawn from national and international press, the article shows how, during the COVID-19 crisis management debate, diverging visions on what is the EU and why should EU solidarity be embraced developed along the Northern–Southern interstate cleavage. More importantly, it indicates how some trends towards the nationalisation, instead of Europeanisation, of EU deliberative dynamics might hinder the future establishment of deeper forms of fiscal integration.

## KEYWORDS

EU politics; COVID-19; fiscal solidarity; discourse analysis; elite communication; legitimacy

## Introduction

In a press conference after the European Council of 26 March 2020 in which the common EU responses to the outbreak of the COVID-19 pandemic were discussed among EU executives, Dutch Prime Minister Mark Rutte made his opposition to any form of common debt issuance crystal clear: ‘I cannot foresee any circumstances in which the Netherlands will accept Coronabonds’. For Rutte, this would turn the eurozone into a ‘transfer union’ in a way not foreseen by the Maastricht Treaty: ‘[Coronabonds] do not fit with the euro and the euro-system, countries such as the Netherlands, Germany and others believe. So, I don’t think that’s going to happen’ (*Reuters*, 27 March 2020). Merkel agreed with this idea, explaining that although ‘some member states have suggested Coronabonds [...] We said this is not the point of view of all member states. And that’s why the ESM is the preferred instrument for me’ (*Euractiv*, 27 March 2020). Amid the greatest post-war contraction of the European economy since World War II, the idea of a joint issuance of common debt had been proposed by Southern members of the Eurozone, particularly Italy, Spain and France, in order to ensure a fiscal response commensurate with the scale

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of the crisis. However, due to the entrenched opposition of the Northern European countries of the EU, particularly the so-called Frugal Four (Netherlands, Denmark, Austria and Sweden), the adoption of this measure appeared highly improbable. Ten years after the outbreak of the euro crisis, the debate on interstate fiscal solidarity had emerged again to haunt with a vengeance the EU's cohesion and throw the Union into yet another existential crisis.

However, on 21 July, 5 months after the March European Council, EU Heads of State agreed that in addition to the new seven-year €1.074tn European budget, they would collectively borrow €750 billion (almost 3% of EU GDP) to finance €390 billion in grants and €360 billion in loans to help their pandemic-hit economies to recover (European Council 2020). The programme, called Next-Generation EU (NGEU), was rightly hailed as a major institutional innovation: never had the EU borrowed to finance expenditures of, let alone transfers to, member states; for the first time, the EU would be able to run a fiscal deficit to respond to an economic shock.

This article contributes to understanding how this leap in integration was possible, as well as what will be its long-term consequences for the EU project, by focusing on an admittedly narrow but arguably key aspect of it: the public deliberation and legitimation processes of the NGEU plan undertaken by EU executive leaders during the spring and summer of 2020. Discussions around the future of the Eurozone during the COVID-19 pandemic turned into an institutional legitimacy crisis that inflamed decade-long political divisions in existence inside the Union. The COVID-19 crisis thus unleashed a pure post-functional moment (Hooghe and Marks 2009) in which the high politicisation of EU policy debates concerning core state powers became enmeshed with national(istic) identity logics in domestic public spheres (Schmidt 2020, 1189), thereby constraining the scope for elite-led bargained solutions and endangering the stability of the EU polity.

In this context, the public communication of EU executive actors becomes key to understanding not only the dynamics and outputs of the policy debate on the macro-economic responses to COVID-19 but also the implications of this debate for the future of the EU. This is because citizens' opinions on EU integration depend to a considerable extent, on the one hand, on elite cueing (Sanders and Toka 2013), so that the continuous work of justification by elites *vis-à-vis* public audiences is key to EU legitimation. On the other hand, the concrete justificatory strategies used by EU elites in order to push for some sets of reforms over others not only matters for the institution (or not) of the concrete reforms at stake but also for the ideational legacies they sediment (Schmidt 2001). Different legitimation strategies mobilise different higher order normative principles and materialise in different institutional logics (Beetham 2013; Weber 1978, 952), so that different justificatory arguments have different impacts on the solidarity structure of the Union as well as on what 'point and purpose' the EU is perceived to have (Sangiovanni 2013).

Against this background, this article employs the tools of discourse analysis to respond to two main research questions: What were the main arguments and legitimatisation strategies used by EU elites during the debate on the NGEU plan? What do the examined discursive dynamics tell us about the future forms of institutionalised fiscal solidarity in the EU? To respond to these questions, the article analyses a systematic corpus of 1,143 direct quotes by the Heads of Government and Finance Ministers of 9 EU member states drawn from a dataset of 6,715 news articles from a set of international and national

newspapers and news agencies. The timeframe of our analysis stretches from 1 March 2020, the month in which the debate about the EU macroeconomic responses to the COVID-19 pandemic started to rise, until 15 September 2020, date by which the conclusions of the 17–21 July European Council had already been communicated by the executives in the different national parliaments.

The article is structured as follows. Section two is dedicated to clarifying our understanding of the meaning and implications of the two key concepts of the article – namely legitimisation and fiscal solidarity in the EU. Section three spells out the methodological strategy, while section four presents the empirical results. Section five builds on them in order to move from the retrospective to the prospective analysis; that is, to re-read the main political logics governing the discursive conflict on the EU fiscal responses to the COVID-19 crisis as a means of gaining some traction on the future debates on fiscal integration that are sure to come. Section six recaps the argument and concludes.

### Theoretical priors

Contrasting the ‘permissive consensus’ era, in which relatively insulated European executives shaped EU institutional evolution on behalf of uninterested but generally approving publics, European integration has become, since the 1990s, ‘politicised’, that is, subject to controversial and salient debates in domestic public spheres (Hooghe and Marks 2009). As such, further integration has become more dependent on the consent of the wider citizenry in the member states (Rauh, Bes, and Schoonvelde 2020).

Although deep divergences exist in the literature on the consequences of this politicisation for the future trajectories of development of the integration process, certain consensus exist on both the crisis driven as well as potentially disruptive potential of this process (e.g. De Wilde and Lord 2016; Hooghe and Marks 2009). As De Wilde (2011, 564) argues, the ‘politicisation of EU issues often involves debates about the nature of the EU polity itself and raises the question of legitimacy’. In fact, politicisation incentivises international organisations and their stakeholders to engage in public communication in order to sustain legitimacy (Rauh and Zürn 2019) when not directly influencing their policy decisions (Miró 2020).

Controversies over the legitimacy of the EU polity are particularly likely to emerge with regards to redistributive policies. We know from comparative federalism research that territorial solidarity – that is, financial redistribution between member states – constitutes an intricate problem for federal polities, particularly in multinational polities with very heterogenous members (Trein 2020). Indeed, EU-wide redistributive mechanisms of financial solidarity have very rarely been adopted in the EU, while remaining hotly contested issues after their establishment (Leconte 2010).

In managing these legitimisation problems, the role of political elites is crucial. Ferrera, Miró, and Ronchi (2021) define elites’ practices to perform this task as ‘polity maintenance’: the elaboration and deployment of discourses, values and symbols that justify policy choices and at the same time reinforce the collective identities and diffuse trust that underpin the stability of a polity. In other words, any political community is dependent upon the cultivation of a symbolic order that defines a ‘we-together’ and thereby legitimises its structures of solidarity and authority (Ferrera and Burelli 2019). This is

particularly important in the politicisation-prone polity that constitutes the EU, in which very often, as Kutter (2020, 105) underlies, 'discursive legitimation is best understood as polity construction'.

However, although being elite led, the construction of legitimacy is always a two-sided process: elites are able to cultivate convincing symbolic orders to the extent that these orders resonate or are consistent with socially accepted normative beliefs about the common good (Beetham 2013). At the EU level, this interactive process is reflected in the fact that national executives negotiating at the EU level need to convince not only their European counterparts but also their national constituencies. As such, we know that if executives publicly tie their hands on national preferences at the EU level, the political costs of concessions in closed-door negotiations increase (Schimmelfennig 2001). In other words, if they prove unable to legitimise agreements brokered at the EU level, they will have to deal with popular resentment at the domestic level.

As Crespy and Schmidt (2014, 1089) pointed out, one should avoid the complete collapse of such a need for domestic legitimation with the liberal intergovernmentalist assumption about the nationally formed character, based on dominant societal interests, of member states' preferences at the EU level. Rather, 'the rationality of leaders resides not so much in any cost-benefit calculations but rather in their capacity to discursively articulate and (re)construct the (interest-based) position of the state both for their domestic constituencies and their European counterparts'. In other words, while part of leaders' discourses is constrained by both material interests and inherited national economic philosophies, hence entailing a path dependent logic, political communication is also strategically used by elites in order to reconfigure interests and legacies and, as such, can constitute an independent variable influencing policy change.

In this sense, legitimisation practices have an obvious discursive component: if, following Weber (1964), an institutional system is legitimate to the extent that its subjects (and rulers) *believe* it has moral permission to command, legitimacy then constitutes an intersubjective component of political power, that is, situated at the level of meanings (Vaara 2014). Or in other words, if legitimation means the production of a sense of worthy, ethical, positive or otherwise necessary policy actions, and thereby the establishment of 'normative approval' or such actions, then it is clear that legitimation is to a large extent accomplished by having recourse to discursive devices (Rojo and van Dijk 1997, 528; see also Kutter 2020).

In our case study, which concerns the legitimation of new fiscal solidarity mechanisms, such a discursive component revolves to a large extent around the definition of the motives for acting in solidarity. Three ideal-typical rationalisations have been identified in the literature (Gerhards et al. 2020). Firstly, interest-based solidarity, or 'self-serving solidarity' (Mau, in Gerhards et al. 2020, 20), is when the solidaristic action benefits 'the giver of solidarity and not (just) the recipient of solidarity', and 'the action is motivated by this benefit' (ibid). This is in line with Hechter's (1988) rational perspective on solidarity, or solidarity based on self-interest. Secondly, value-based solidarity which is guided by the pursuit of a sense of justice and without expectation of benefits from this solidarity (Gerhards et al. 2020, 21). And thirdly, polity- or identity-based solidarity which is mainly based on the identification with a common collective identity or political community between the givers and recipients of solidarity (Börner 2013; Jones 2014:12). Of course, these different ways in which to think about solidarity are ideal-types, so that they

interrelate and coexist in actual institutional settings rather than being mutually exclusive categories. However, for the purpose of our study, it is interesting to analytically distinguish between them because identifying which mental model is predominant in EU fiscal politics sheds light on how Europeans see themselves and their relationships with other Europeans and, as such, how they understand the EU has to be built and governed. These are the aims of the rest of the article.

## Methodology

From a methodological point of view, we analyse discursive conflict by combining a descriptive quantification of recurring textual elements with an interpretative framework particularly concerned with the construction of key discursive-analytical narratives that, given a particular context, shape meanings and influence policy decisions. We thereby follow calls made in the literature to develop hybrid articulations within the field of discourse studies that cut across the positivist versus interpretivist divide (Jones and Radaelli 2015).

We draw from Fairclough and Fairclough (2012, 23) to position as our minimal analytical unit that of argument, that is, a ‘verbal, social activity in which people attempt to criticise or justify claims’. On the view proposed here, arguments emphasise the links between present states of affairs and future ones, articulating justifications to defend which courses of action ought to be adopted (and which ones should be avoided) in the light of (explicit or implicit) desired aims (ibid: 43). Our approach to media content analysis has important affinities with the methodology of claim-making analysis popularised by Koopmans and Statham (2010) in that we connect actors to policy positions in various forms of statements made in the public sphere. However, our concern is not with how cleavages are (re-)produced and policy coalitions articulated but with the pragmatic and normative justifications of policy positions and with the broader paradigms on EU integration which animate these justifications.

We study the discussions on the macroeconomic management of the COVID-19 economic slump among EU political elites by focusing on the actual statements, as reported in the mass media, made by the Heads of Government and the finance ministers of nine EU member states that played a key role in this debate. These member states include both traditionally fiscally hawkish member states (Austria, Denmark, Finland, Netherlands, as well as Germany)<sup>1</sup> and traditional supporters of greater fiscal integration (the countries forming the Southern belt of the Eurozone: Portugal, Spain, France, Italy). To be clear, we only code direct quotes made by these policymakers as reflected in the reports of newspapers, not claims attributed to them by journalists. The collection of the quotes/arguments has been limited to those concerning the key aspect of the EU debate on the macroeconomic management of the COVID-19 crisis: namely, the pooling of fiscal risks and resources at the EU level. As such, have coded arguments about the five main topics that focused the attention of this debate: the need to establish a European joint debt guarantee; the temporal introduction of emergency fiscal transfers; the establishment of new EU taxes to finance them; the size and composition of the 2021–2027 Multiannual Financial Framework (MFF); and the mechanisms set to govern these instruments. Our timeframe is comprised of the period from the outbreak of the COVID-19 pandemic in the EU

**Table 1.** List of post holders examined.

Country	Position	Name of post holder	Newspaper or agency
Austria	Chancellor	Sebastian Kurz	<i>Die Presse, Der Standard</i>
	Minister of Finance	Gernot Blümel	
Denmark	Prime Minister	Mette Frederiksen	<i>Ritzau, Jyllands</i>
	Minister of Finance	Nicolai Wammen	
Finland	Prime Minister	Sanna Marin	<i>STT, Kauppalehti</i>
	Minister of Finance	Katri Kulmuni (until June 9)	
	Minister of Finance	Matti Vanhanen (June 9 – Sept. 10)	
France	Minister of Finance	Annika Saarikko (from September 10)	<i>Le Figaro, Agence France Press</i>
	President	Emmanuel Macron	
	Minister of Finance	Bruno Le Maire	
Germany	Chancellor	Angela Merkel	<i>Süddeutsche Zeitung, Die Welt</i>
	Minister of Finance	Olaf Scholz	
Italy	Prime Minister	Giuseppe Conte	<i>La Repubblica, Il Sole 24 Ore-Online</i>
	Minister of Finance	Roberto Gualtieri	
Netherlands	Prime Minister	Mark Rutte	<i>DutchNews.nl, De Telegraaf</i>
	Minister of Finance	Wopke Hoekstra	
Portugal	Prime Minister	António Costa	<i>Agencia Lusa, Jornal de Noticias</i>
	Minister of Finance	Mario Centeno	
	Minister of Finance	João Leão (from July 16)	
Spain	Prime Minister	Pedro Sanchez	<i>El País, El Mundo</i>
	Minister of Finance	Nadia Calviño	

(more concretely, in Italy) on 1 March 2020 until 15 September 2020, the date by which the national parliamentary debates on the 17–21 July European Council conclusions had already taken place.

In order to build the corpus, the electronic depository of newspapers *Factiva* (the largest of its kind in the world) was used. Using search strings that contained the terms ‘European Union’ or ‘EU’ (in both English and national languages) plus the surname of the Prime Minister/Minister of Finance, and looking for each leader in two national quality newspapers or news agencies<sup>2</sup> (see [Table 1](#)) as well as in *Reuters*, *Euractiv* and the *Financial Times*, a total of 6,715 articles were recovered from *Factiva* archives. Through a process of manual coding, 1,143 direct quotes which contained arguments discussing the aforementioned policy issues were identified.<sup>3</sup> Repeated quotes in more than one newspaper were counted only once. In a second step, we inductively aggregated these 1,147 quotes into different argumentative categories (see [Tables 2 and 3](#)).<sup>4</sup>

The following section presents the results of this exercise by dividing them into two different periods: the first one stretching from March until the 21 July European Council agreement and the second comprising the post-agreement justifications between late July and 15 September. Throughout the section, the empirical insights are translated back to the threefold analytical distinction between interest-based, value-based and identity-based solidarity, so as to discern what ‘narratives of polity-building’ (Kutter 2020) came to predominate in the debate on the NGEU.

## Results

### Discourses on EU fiscal solidarity during the COVID-19 pandemic

[Tables 2 and 3](#) summarise the frequencies of the arguments used by the different coalitions of member states in the discussions that took place before and after the July European Council agreement. Not surprisingly, the asymmetrical distribution of zero

**Table 2.** Arguments against and in favour of the EU fiscal risk pooling between March 1 and July 21 of 2020.

	Argument	Northern coalition		Southern coalition		Germany	
		n	2	n	n	N1	n
Arguments defending greater EU-wide fiscal risk pooling	Exogenous and/or symmetrical shock	0	0	<b>35</b>	<b>11.97</b>	3	3.23
	Exceptional crisis requires an exceptional path	6	4.55	23	7.87	7	7.53
	Beneficial to economic interests of all/ other member states	9	6.82	<b>49</b>	<b>16.78</b>	8	8.60
	Matter of solidarity	17	12.88	26	8.9	<b>24</b>	<b>25.81</b>
	Strengthen EU identity and/or polity	5	3.79	31	13.36	<b>25</b>	<b>26.88</b>
	Danger of EU disintegration	1	0.76	<b>71</b>	<b>24.3</b>	<b>11</b>	<b>11.83</b>
	'Because it's a temporary mechanism, we agree'	7	5.30	5	2.16	1	1.08
	First step towards fiscal union	0	0	7	3.02	1	1.08
	EU global position strengthened	0	0	6	2.59	2	2.15
	Opportunity to change Southern European growth models	8	6.06	26	11.21	5	5.38
	To not repeat the policy mistakes (austerity) of the euro crisis	0	0	8	3.45	2	2.15
	Necessary because monetary policy has reached its limits	0	0	4	1.72	0	0
	Arguments against greater EU-wide further fiscal risk pooling	Coronabonds endanger sound economic policy	11	8.33	0	0	0
Contrary to own economic preferences/interests		<b>15</b>	<b>11.36</b>	0	0	0	0
Against greater EU fiscal integration		<b>38</b>	<b>28.79</b>	0	0	1	1.08
Macroeconomic conditionality is needed		<b>14</b>	<b>10.61</b>	1	0.43	3	3.23
Others		1	0.76	13	5.6	0	0
<b>Total</b>		132	100	292	100	93	100

**Table 3.** Arguments justifying the 17–21 July European Council agreement between July 21 and September 15 of 2020.

	Northern coalition		Southern coalition		Germany	
	n	%	n	%	n	%
Beneficial to economic interests of all member states	4	5.26	1	2.27	0	0
Beneficial to own economic interests	<b>9</b>	<b>11.84</b>	<b>7</b>	<b>12.96</b>	0	0
Matter of solidarity	2	2.63	1	2.27	2	16.67
Strengthen EU identity and/or polity	4	5.26	5	6.58	<b>5</b>	<b>41.67</b>
Danger of EU disintegration	2	2.63	5	6.58	0	0
'Because it's a temporary mechanism, we agreed'	<b>10</b>	<b>13.16</b>	0	0	1	8.33
First step towards fiscal union	0	0	0	0	1	8.33
Opportunity to change growth model of Southern economies	1	1.31	<b>14</b>	<b>31.82</b>	1	8.33
No macroeconomic conditionality attached, so good agreement	0	0	<b>6</b>	<b>13.64</b>	0	0
Macroeconomic conditionality attached, so good agreement	<b>9</b>	<b>11.84</b>	1	2.27	0	0
Bolsters green transition	8	10.53	4	9.1	0	0
Obtention of budget rebates and reduced 'grants component'	<b>18</b>	<b>23.68</b>	0	0	0	0
EU global position strengthened	2	2.63	0	0	2	16.67
Rule-of-law conditionality has been introduced	7	9.21	0	0	0	0
Others	0	0	0	0	0	0
<b>Total</b>	76	100	44	100	12	100



numbers in both tables confirms the existence of two stable discursive coalitions during the COVID-19 crisis in Europe, with a North–South cleavage organising different argumentative lines on the debate on fiscal risk pooling, with Germany siding with the Southern bloc.

As regards the pre-agreement period, [Table 2](#) shows that the three most used arguments by the pro-fiscal risk pooling coalition were the appeal to the economic interests of Northern member states, the emphasis on the exogenous and symmetrical nature of the COVID19 economic downturn and the warning about the danger of EU disintegration. The first of these arguments stressed the Northern European Member States' own economic interests in providing financial help to the Southern ones to ensure demand within the single European market. As pointed out by Portuguese PM António Costa:

There is no need to appeal to the values of solidarity. Pure mercantile logic is enough to explain why it is really necessary for Europe to respond together [...] It is pure selfishness, if you like. The Netherlands, which is one of the biggest beneficiaries of the internal market, does not need to help others for the sake of others. It needs to participate with everyone in a common effort for its own benefit. The Dutch, who are the biggest beneficiaries of the internal market, will not be well alone if the rest of Europe is in bad shape. (LUSA, 9 May 2020)

The second most recurrent argument used by the Southern bloc, instead of stressing the very dependence of the export-led Northern economies on Southern European markets, drew attention to the specific problem structure of the COVID-19 crisis as a way to make more palatable, in normative terms, the establishment of fiscal transfers. The emphasis on the exogenous and symmetrical nature of the COVID-19 economic shock, by seeking to activate perceptions on the shared situation between Northern and Southern member states and deactivating narratives holding the South accountable for its greater economic contraction, implied an attempt to increase the perceived deservingness of Southern member states to receive financial help. As argued by the Italian PM Antonio Conte:

We continue to oppose the use of tools such as the ESM which appear totally inadequate with respect to the purposes we pursue, considering that we are facing a symmetrical epochal shock, which does not depend on the behaviour of individual States [...] It is time to show more ambition, more unity and more courage. In the face of a storm like Covid-19 that affects everyone, a life preserver is not needed for Italy: a solid, European lifeboat is needed to take our united countries to cover. (*La Repubblica*, 3 April 2020)

In any case, the argument most employed by the Southern European leaders to justify the need for EU common debt issuance and fiscal transfers was based on the potentially disintegrative implications for the EU polity that an absence of an EU-level fiscal policy response would trigger. The prominence of this argument is particularly high, scoring 71 appearances in our data (24.3% of the Southern European arguments). This argumentative line had already been initiated by Italian PM Antonio Conte after the first European Council on the macroeconomic management of the COVID-19 crisis on 26 March:

If we fail to provide a rapid and joint response to the crisis, we will truly endanger the very foundation of the Union [...] The European citizens will no longer be able to give an answer to why it is useful to live in a common house to find more adequate shelter. (*La Repubblica*, 26 April 2020)

Importantly, the contention that a lack of EU financial help would trigger the disruption of the European polity was largely based on the perception that it would reinforce Eurosceptic populist parties in the South. As argued by Macron:

If we don't do it today [to issue common debt with a common guarantee], I tell you the populists will win, today, tomorrow, the day after tomorrow, in Italy, in Spain, perhaps in France and elsewhere [...] You cannot have a single market where some are scarified. (*Financial Times*, 16 April 2020)

In this line of justification, which is diametrically opposed to the postfunctionalist expectation (Hooghe and Marks 2009), the 'populist threat' becomes a factor pulling towards more instead of less fiscal integration. Paradoxically enough, previous research has shown how this same argumentative card is commonly played by Northern European executives to defend the opposite policy conclusion, i.e. to prevent the pooling of fiscal risks (Miró 2020). In any case, contrary to accounts that conceive crises as pure external shocks, the construction, by the Southern bloc, of the COVID-19 crisis as an 'ontological crisis' of the EU vindicates the view that the promotion of failures into crises is always politically and discursively mediated (Voltolini 2020). More importantly, it also shows how the discursive register of 'emergency politics' (White 2015), used during the euro crisis to depoliticise the politics of EU fiscal governance reform can also be deployed to politicise them.

However, the key enabling factor in tilting the balance of forces in favour of EU common debt issuance during the COVID-19 crisis was the change of position of the governmental elites of the hegemonic member state inside the EU, namely Germany. Given its particularly strong opposition to the establishment of Eurobonds during the euro crisis which was rooted in an ordoliberal economic culture deeply popular among its policy elites (Brunnermeier, Harold, and Landau 2016; Matthijs and McNamara 2015), Germany's change of mind in this aspect appears as particularly striking. What arguments were used by the German executive in order to justify such a policy shift?

Our data shows that the justification which was based on the danger of polity disruption was also central in the discourse of German leaders, as it was the third most repeated argument. As shown by the following quote of German Finance Minister Martin Scholz, the dangers of disintegration were often articulated with an emphasis on the economic dependency of Germany on the European common market:

We managed to avert another financial crisis at an early stage, that could potentially split us economically and politically [...] The economic basis of our prosperity is the European internal market, and the political basis for this internal market is that all member states are winners of this internal market [...] A lasting economic division would also have consequences for Europe's political cohesion. (*Die Welt*, 8 July 2020)

However, the most common argument used by Scholz and Merkel was polity-focused, basing their defence of greater fiscal risk pooling on the existence of a shared European polity and the need to strengthen it. As expressed by Chancellor Merkel in the German Bundestag, the Coronabonds debate was about the obligation 'to defend our Europe, to strengthen it' (*Euractiv*, 6 April 2020) in front of the 'biggest trial the European Union has faced since its foundation' (ibid). Of interest in Merkel's discourse in this regard is its future-oriented polity perspective: while arguing for Coronabonds, Merkel seeks to make compelling EU-wide political association: 'We must act in a European way so that we get out of the crisis strengthened' (*Reuters*, 18 May 2020). In other words, the concrete policy

is justified in terms of its polity repercussions. As stated by Merkel some days before the July European Council: 'What we do must be something massive, it can't be twisted' because 'it has a political dimension beyond the numbers' (*Süddeutsche Zeitung*, 14 July 2020). This emphasis on the political rationale behind the institution of greater fiscal risk pooling seems to indicate that the Southern Europeans' warning about the peril of disintegration had an impact on the German Chancellor.

Finally, distinctive of the German leaders' argumentative discourse is its wider normative basis in comparison to that of the leaders of the Southern and Northern coalitions: while more than 25 percent of Merkel and Scholz's arguments sought to frame the macroeconomic debate in terms of solidarity with troubled member states, only 12.88% of the Northern arguments and 8.9% of the Southern ones did this (see [Table 2](#)). The German leaders' stress on the value of solidarity stands in stark contrast with the normative approach Merkel maintained during the debate on EU fiscal governance reform during the euro crisis when the traditional ordoliberal values of stability and responsibility were the most prominent ones (Crespy and Schmidt 2014, 1096).

Finally, what arguments were delivered by the Northern bloc in order to justify their opposition to greater fiscal risk sharing in the EU? As [Table 2](#) shows, the two most common arguments used by Northern executives were principle-based, that is, they stemmed from their principled opposition to any form of 'debt union' and their ideological attachment to the belief in 'national responsibility' in fiscal issues. As expressed by the Finnish Finance Minister Katri Kulmuni when defending the notion of budgetary sovereignty:

We are a cooperative EU member state, but even in exceptional circumstances, the countries' own responsibility for the management of their economic policy should not be revoked or joint and several debt should not be increased. (*SFT*, 19 May 2020)

Principle-based positions on fiscal policy debates (and in politics more broadly) tend to be more difficult to modify and, therefore, less amenable to bargain (Odell 2000). As Wopke Hoekstra, the Dutch Finance Minister, expressed it: 'We are and will remain opposed to Eurobonds. We think this concept will not help Europe or the Netherlands in the long-term' (*Reuters*, 10 April 2020).

Complementarily, the second most used argument employed by the Northern executives appealed to the preferences and interests of their taxpayers to the opposition to joint common debt issuance, fiscal transfers and a larger MFF. As provocatively expressed by the Austrian Chancellor:

I believe, however, that much of what we represent is in the interests of the German taxpayer and that German politics has always represented it in a similar way. It is certainly not negative for German taxpayers if the budgets that flow towards southern Europe do not grow indefinitely. (*Der Standaard*, 28 July 2020)

However, as [Table 2](#) shows, Northern executives made such a focus on domestic economic preferences compatible with an appeal to European solidarity: they did not renounce to harness for their discourses the normative appeal of the notion of solidarity, but they articulated this 'floating signifier', to use Laclau's (2014) terminology, with their opposition to greater fiscal integration. As argued by the Austrian Finance Minister Gernot

Blümel: 'I do not recognize that having joint debt liability is the same as being solidarity. We have put a very clear emphasis on European solidarity. The question is how to ensure solidarity' (*Die Presse*, 20 April 2020).

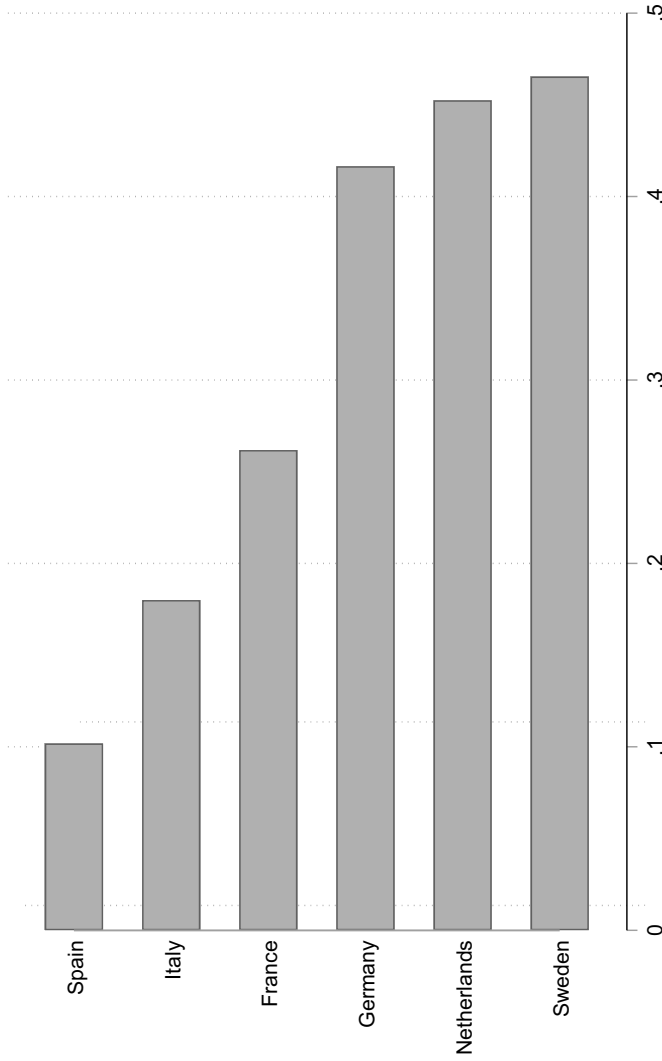
The opposition of the Danish, Austrian and Dutch executives to the establishment of fiscal transfers, at least in the public sphere, extended until the very beginning of the 17–21 July European Council: according to our data, in the two weeks immediately before the European Council, the leaders of the Northern countries were still arguing against the NGEU plan proposal presented by the Commission on 27 May 2020.

#### Divergent ex-post justifications of the NGEU agreement

By raising commonly-issued debt to finance intra-EU temporary fiscal transfers, the NGEU package agreed upon in the 17–21 July meeting of the European Council constituted a step towards greater fiscal risk pooling of the kind opposed by the Northern Coalition. It is thus particularly interesting to study how the agreement was communicated by the Northern executives to their domestic audiences. In fact, this is all the more intriguing given the wide percentages of the citizenry of net contributor countries that opposed intra-state EU fiscal solidarity. Original data from the survey 'The economic and political consequence of the COVID-19 crisis in Europe'<sup>5</sup> showed that most of the 40% of the respondents in Netherlands, Sweden and Germany disagreed with the institution of a common EU fund to financially help member states in difficulties, as shown by [Figure 1](#).

As [Table 3](#) shows, in contrast to their principle-based oppositional discourse employed during the previous months, the two most common claims in Northern leaders' post-agreement discourses primarily emphasised the obtention of budgetary rebates for their countries (the exception here being Finland, see footnote 1) and the scaling back of the grants element of the recovery fund from €500bn (as proposed by the European Commission) to €390bn, as well as the temporary character of the NGEU programme. This is indicative of how much Northern executives perceived (and thereby explained to their constituencies) the NGEU package as a concession to the Southern European countries rather than as a solution to common structural problems.

Complementary to this, the third most repeated argument by Northern elites is the emphasis on the conditionality mechanisms introduced in the Council agreement thanks to the pressure they applied during the negotiations. Paradoxically enough, as [Table 3](#) shows, the topic of conditionality is also present in Southern executives' justifications, although in an entirely opposed direction: the absence of conditionality mechanisms is mentioned as a good point of the agreement. Importantly, it is not until the fourth most employed argument by the Northern member states that a claim positively defending the new fiscal policy capacities proposed by the European Council July agreement is found: this refers to how beneficial it is for Northern countries to strengthen the single market.



**Figure 1.** Proportion of respondents who disagree with the statement 'All EU Member States should contribute to a common EU fund to help any other MS facing potential economic difficulties in times of crisis'.

If we turn to the discourses articulated by Southern European executives when publicly explaining the European Council agreement, the most repeated claim emphasised the opportunity provided by the NGEU package to rebuild the growth model of Southern European economies. As expressed by Antonio Costa, Portuguese PM:

We have the bazooka. We need to know how to use it well, have a good battle plan and not miss the shot. We will have, on average, by 2029, 6.7 billion euros to run per year. It is more than doubling the maximum we have had so far. The execution of this amount will require an enormous effort on the part of the public administration, on the part of the economic agents and an enormous responsibility. (*LUSA*, 24 July 2020)

This fact can be read as constituting an interpretive bridge between the central preoccupation of the Northern coalition with the conditionality mechanisms of the governance framework of the NGEU, and, therefore, with the need to harness EU funds to implement growth-enhancing structural reforms in Southern European countries, with a will by these countries to actually implement these reforms (in spite of their opposition to the idea of conditionality). In turn, the second most common claim in the post-agreement discourses of executives of the pro-pooling risk sharing coalition underscores the quantity of funds obtained by their own country, a notable shift from the emphasis on the common benefits to all countries that was the second most used claim during the pre-agreement months.

Finally, in the case of Germany, we observed discursive continuity throughout the two periods. As such, in the post-agreement weeks, both Merkel and Scholz maintained their focus on solidarity and the need to defend the cohesion of the EU polity. On Germany, [Tables 2 and 3](#) show that both the temporary character of the financial stabilisation transfers as well as their potentially permanent establishment in the mid-term are used contemporaneously to legitimise the NGEU programme. Of course, this is due to the discrepancy between Chancellor Merkel and Finance Minister Scholz.<sup>6</sup> However, our data on German leaders' quotes after the July European Council is very limited. Nevertheless, other research confirms that, at least in Angela Merkel's discourse, the temporary character of the new instrument was of central importance for its domestic legitimisation (Howarth and Schild [2021](#), 221–222).

### Long-term political implications

A key debate underlying both the ex-ante and ex-post discussions on the NGEU programme was the extent to which this new financial facility had the possibility to evolve into a permanent source of funding for the EU. Indeed, as [Tables 2 and 3](#) show, particularly Southern European executives occasionally framed the NGEU plan as heralding deeper forms of fiscal integration. In contrast, both the Northern national executives and Angela Merkel legitimised the institution of the new recovery fund by assuring its exceptional and temporary character: 'I don't see the recovery tool itself increasing integration [. . .] This is an exceptional, one-time package, not a permanent approach', argued Prime Minister Sanna Marin in the session of the Finnish Parliament debating the July Council agreement (*Kauppa-lehti*, 22 July 2020). Indeed, as [Table 3](#) shows, the temporary character of the joint issuance of common debt was the second most repeated argument voiced by the executives of the Northern coalition in order to justify its establishment.

In spite of Northern leaders' rhetorical forcefulness in rejecting future forms of fiscal integration – a forcefulness, one could argue, equivalent to the one shown during the COVID-19 crisis to oppose temporary fiscal transfers –, the extent to which the NGEU package will eventually give place to a permanent central fiscal capacity will depend on a number of future developments. Chief among them will be the ability of the NGEU fund to achieve its stated policy goals. Failure to incentivise major structural reforms, particularly in digitalisation, administration efficiency, the education system and climate goals, and thereby failure to provide a boost to Europe's (particularly Southern Europe's) growth potential will seriously sever any possibilities of future forms of fiscal integration.

However, apart from the capacity of the EU recovery fund to promote quality spending, our analysis of the discursive dynamics that governed the process leading to the European Council agreement of July 2020 illuminates a set of logics structuring the politics of fiscal solidarity in the EU that helps us to better calibrate potential future trajectories of EU fiscal integration.

Essentially, the empirical analysis shows that European elites relate to the EU more for what it offers in economic terms than for what it is in political terms: the predominance of a 'self-serving' conception on solidarity, mainly based on expected economic benefits, attests to this fact. As the previous section has explained, this vision on solidarity is not only predominant in the justificatory discourses of Northern European executives throughout the studied period but also in the post-agreement discourses of Southern European executives. The exceptions in this regard are German (and French) national leaders, for whom, at least publicly, the political (and moral) implications of solidarity take precedence over its financial consequences. Overall, however, during the COVID-19 crisis, the emphasis was placed on affirming the EU as primarily an economic rather than political space.

The analysis also shows how most national leaders sitting in the Council and European Council undertake EU negotiations first and foremost from their national perspective: the unilateral focus on the defence of the national standpoints and the logic of 'winners' and 'losers' – both elements directed to the respective national public opinions – prevail over the quest for common solutions and the cultivation of trusting relationships. As Giraud (2020) commented in the light of the COVID-19 negotiations, 'the political culture and climate – as well as the working method – of the European Council have not really become "*communautaires*": it deliberates more like a classic diplomatic intergovernmental conference than as a Union institution'. A consequence of deliberation being perceived as foot-dragging rather than common problem-solving is that the perceptions on the significance of the final agreements widely diverge among member states. Importantly, these divergences can become polity-undermining not only because they lead to unsustainable ambiguities (or even contradictions) with regards to the content of the agreements but also because national executives tend to communicate the final agreements in terms of concession to other countries, thereby risking the sharpening of identity-based distrusts. If deliberation on fiscal solidarity, even when it leads to new institutionalised forms of solidarity, weakens the collective European 'we' upon which any form of solidarity is built, then, as Jones (2018) argued, we might be seeing integration and disintegration happening at the same time.

Finally, the empirical analysis also has theoretical implications for research on EU politicisation and integration theory more broadly. The analysis of the EU debate on COVID-19 management only shows partial support for the postfunctionalist hypothesis *à la* Hooghe and Marks (2009): the negative spiral behind adverse politicisation dynamics did not lead to a halt to integration but to greater centralisation of fiscal powers. Nevertheless, we still talk about partial support for the postfunctionalist expectation inasmuch as the dynamic ‘constraining dissensus’ (ibid) undoubtedly played a key role in shaping both the policy process and its outputs: the final version of the recovery plan adopted by the European Council eliminated or minimised those aspects of the Commission’s proposal that more firmly involved the creation of new European public goods and expanded the role of the Commission: while the new Strategic Investment Facility was scrapped, the funding of the Just Transition Fund and of the InvestEU, EU4Health and Horizon Europe programmes was substantially lowered<sup>7</sup> (see European Commission 2020; European Council 2020).

As such, instead of postfunctionalism, the (new) intergovernmentalist perspective centred on the notion of ‘disequilibrium’ (Bickerton, Hodson, and Puetter 2015, 716) seems to better account for the tumultuous creation of the NGEU: while moved by national preferences and economic interests, national elites nonetheless agreed to deepen integration. However, by ‘producing policy outputs that polarise politics in ways that cast doubt on the future of the Union’ (Hodson and Puetter 2019, 1157), i.e. by solidifying an international North-South cleavage between guarantor and debtor member states and thus hurrying down the path towards the nationalisation rather than Europeanisation of EU deliberative dynamics, the new institutional set-up leaves open important questions about the legitimacy and durability of European fiscal integration as things stand.

## Conclusions

This article has departed from the theoretical assumption that issues of solidarity undergird the stability of the EU polity by holding the key to its legitimation (Jones 2014:12). This is particularly true in moments of crisis, which by challenging the take-for-grantedness of previous socio-political realities constitute ‘legitimacy tests’ of institutional orders (Patriotta, Gond, and Schultz 2011). Against this background, the article has empirically analysed how European executives deliberated over European fiscal solidarity during the outbreak of the COVID-19 crisis in the first semester of 2020, as well as how they later justified the NGEU recovery plan agreed upon by the European Council in July of the same year.

The evidence gathered from the systematic analysis of arguments over the main policy issues regarding EU fiscal solidarity during the crisis manifests that important divergences between two coalitions of member states – a pro-fiscal risk sharing coalition geographically situated in the South of the EU *versus* a coalition defending national sovereignty in fiscal policy situated in the North – exist within the EU. For the Northern coalition, formed by net contributors to the EU budget, (large-scale) fiscal solidarity is rather ‘self-serving’ (Mau, in Gerhards et al. 2020, 20); it is only justified if it is exceptional and temporary and if it serves to strengthen the internal market. For the Southern coalition and Germany, instead, fiscal solidarity is instead necessary to safeguard the political cohesion of the



Union as well as to provide an opportunity to Southern economies to catch up with the North. Hence, diverging visions on what is the EU and why it should be embraced coexist along the Northern–Southern cleavage in Europe.

Of course, our findings only provide a first impression of the discursive logics and normative paradigms dominating elite politics of fiscal policy in the EU. These findings must be reset further by extending the analysis to include a bigger sample of countries and leaders (particularly from Eastern Europe), further media outlets and eventually elite surveys. However, the results do suggest that the vision of the NGEU as ‘antechamber of a European fiscal federal solution’ (De Costa Cabral 2021) might prove to be excessively hasty.

## Notes

1. The inclusion of Finland instead of Sweden, which is the only member of the so-called ‘Frugal Four’ alliance not included in our sample, is for technical reasons: *Factiva* has much better coverage of Finnish newspapers. Having said that, there is no doubt that Finland during the last years (particularly during the euro crisis) has been a firm defender of national responsibility in fiscal policy. During the COVID-19 crisis, this was also the case: our dataset shows that already by the end of March, Finance Minister Katri Kulmuni expressed strong opposition to the idea of joint borrowing (STT 27 March 2020) and that during the July negotiations, the Finnish executive consistently defended a smaller MFF and sided with the Frugal Four. However, Finland declined to join this alliance because, in contrast to the Frugal Four, it opposes the creation of ‘blocs’ within the EU and dislikes the introduction of budget rebates for certain countries in the MFF, Finnish Finance Minister Matti Vanhanen declared (STT 31 August 2020).
2. The two newspapers of each country that yield more results in *Factiva* according to the indicated search string have been selected.
3. The database of quotes is available from the authors.
4. The coding process has been done two times by two independent coders. The results of the two coders showed a ‘substantial’ degree of inter-coder reliability, with an average Kappa coefficient of 0.63.
5. ‘The Economic and political consequences of the COVID-19 crisis in Europe’ survey was conducted by the European University Institute, the London School of Economics & Political Science, the University of Milan and the Giangiacomo Feltrinelli Foundation in the framework of the research project ‘Policy Crisis and Crisis Politics, Sovereignty, Solidarity and Identity in the EU Post-2008’ financed by the European Research Council. The fieldwork was administered by YouGov in June 2020 in seven European countries (UK, France, Germany, Italy, Spain, Sweden and the Netherlands) with a total number of 7,579 valid cases.
6. There are three other governments in the sample of selected countries that have finance ministers belonging to a party different from that of the Prime Minister. These are Italy, Finland and the Netherlands. However, both our data as well as secondary literature confirms that in all three countries there weren’t relevant intra-governing coalition differences with regards the approval of the NGEU package.
7. In the subsequent negotiations between the European Council and the European Parliament, €15 billion extra were assigned to EU programmes in areas such as health, research (Horizon Europe) and young people.

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