Tampere University

LAIA PI FERRER

Global Discourses in Domestic Politics

Coping with Economic Crisis in Portugal and Spain

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On a snowy day in Tampere, January 2020,

Laia Pi Ferrer

ABSTRACT

There is a significant body of research that provides a useful overview of the complexity of governance in the contemporary globalized world. Even though it is a widely held view that there is currently no hierarchy of power that guides different nation-states in the same direction, scholars have pointed out that national policymaking is interdependent with the trajectories of other countries. We can therefore ask how it is that different nation-states tend to arrive at similar policies, using similar ideas and discourses when there is no external force ordering them to do so. This research puzzle has been approached by the neoinstitutionalist research tradition, which has described the process of growing isomorphism through the diffusion of global models, discourses, ideas and scripts. In this line of thought, national actors are portrayed as 'unthinking' actors without agency, who just follow current fashions. However, the mechanisms and rationales by which this global knowledge is incorporated into local contexts have been neglected.

This dissertation approaches these problems through an examination of the 2008 economic crisis. As the impact of this economic downturn was global, the discourses—reactions, explanations, solutions and expectations—were likewise global. This is relevant as the rationale by which the crisis was framed, observed, debated and managed was not made in isolation. But how were those global discourses evoked and utilized when handling domestic politics during the economic crisis?

To address this question, the present thesis studies the global crisis discourses, understood not only as talk but also as actions and knowledge, from a bottom-up perspective. I analyse the mechanisms by which they became part of the national context and what triggered their use in national arenas. Theoretically, I tackle the question from a discursive institutionalist and epistemic governance perspective to investigate how global discourses are utilized in national contexts. Empirically, I study prominent elements of the crisis discourses that spread globally in order to make sense of the way in which they were invoked in parliamentary debates and media reports in Portugal and Spain. The empirical research has been reported in four articles. Article I studies how references to other countries were used in debating national policies during the crisis. Article II examines how a fashionable,

globally spread term— 'austerity'—was used in national policy debates. Article III studies how the intervention by the Troika in Portugal was handled from a discursive perspective. Article IV investigates how a new coordinative political tool—European Semester— was managed in national policy-making. All four case studies in this dissertation have a methodological orientation making use of both quantitative and qualitative research methods. As its quantitative methods, the dissertation uses content analysis and frequency of occurrence to investigate whether and how often certain elements of the global crisis discourses appeared in national policy-making. As to qualitative methods, the dissertation employs discourse analysis and rhetorical analysis to study how global crisis discourses were involved in the arguments, justifications and ideas put forward by national policy-makers when debating and accounting for national policies.

Drawing on the analysis and the results of the four articles, I present three main results. First, I argue that the use of certain references to illustrate and justify political points of view depended on how a country positioned itself in the crisis and within the European community– that is, how national actors identified the country in question. This 'national' reference group is the one that makes more sense and is more acceptable for the national audience to compare and identify with, which is why certain countries were evoked as important rhetorical examples to render comprehensible the position of the nation and to define what political aims were to be achieved. Second, I claim that it was not the prevailing situation of a country that explains why national actors started talking about and using 'austerity' more. Instead, when 'austerity' became a globally fashionable term within which to conceive of, manage and debate the 2008 financial crisis, actors in different nation-states started to follow the trend, arguing and formulating new national policies and reforms under the 'austerity' rubric. Third, I argue that, even in coercive practices by which international organizations exert and influence, national actors performed their agency by domesticating the international conditions and using them within and for national political discourses. Therefore, national actors were not only strategic in introducing global ideas – such as catchwords and references to other countries, but also when introducing international measures and guidelines that they had to comply with. Hence, global discourses were used to understand domestic situations within this crisis, to give answers to the problems and to guide national policies. Global crisis discourses were also utilized to legitimize many types of cuts and unpopular reforms, such as austerity policies.

This dissertation contributes to the theoretical understanding of the mechanisms and rationales by which actors in different nation-states come to enact and utilize global discourses in domestic politics by taking a step further towards a diffusion and transfer approach. Although domestic policy-making was guided or influenced by the global crisis discourses, national actors did not remain passive concerning these global discourses. Rather, actors used and invoked those discourses when they were trustworthy in the national context and when they found them suitable to further their own interests. This leads us to the conclusion that it is better to talk about a synchronization of national policies worldwide. That is, nation-states end up following similar trends or moves, but maintain their distance from one another. Even though there are ideas, exogenous models, international recommendations and even requirements that spread worldwide, they are interpreted and utilized in different national contexts.

TIIVISTELMÄ

On olemassa runsaasti tutkimusta, joka tarjoaa hyödyllisen yleiskatsauksen hallinnan monimuotoisuuteen globaalissa maailmassa. Tutkimuksen kentällä jaetaan ymmärrys siitä, että ei ole olemassa hierarkkisia valtarakenteita, jotka ohjaisivat kansallisvaltioita samaan suuntaan. Tutkimus on kuitenkin osoittanut, että kansalliset politiikat ovat keskinäisriippuvaisia ja, että ne seuraavat samoja kehityslinjoja. Miten on siis selitettävissä, että kansallisvaltiot päätyvät samankaltaisiin politiikan ratkaisuihin, vaikkei siihen olisi olemassa mitään ulkoista pakotetta? Uusinstitutionalistinen tutkimusperinne on selittänyt politiikoiden samankaltaisuutta globaalien ideoiden, mallien ja diskurssien leviämisellä. Tässä ajattelussa kansallisia poliittisia päättäjiä pidetään usein intressittöminä toimijoina, jotka seuraavat politiikan globaaleja muoteja ja ideoita. Se, millaisten mekanismien kautta tällainen globaalien diskurssien ja ideoiden paikallinen omaksuminen tapahtuu, ei ole saanut juurikaan huomiota.

Tämä tutkimus pyrkii vastaamaan edellä esitettyihin kysymyksiin tarkastelemalla vuoden 2008 talouskriisiä ja sen ympärillä käytyä kansallista poliittista keskustelua. Väitöskirjassa lähdetään oletuksesta, että koska kriisin vaikutukset olivat monilta osin globaaleja, myös kriisiin kytkeytyneet puhetavat, reaktiot, julkilausutut selitykset ja ehdotetut ratkaisut olivat globaaleja. Toisin sanoen kriisistä käyty poliittinen keskustelu ei tapahtunut kansallisessa tyhjiössä vaan globaalissa kehyksessä. Mutta miten näitä globaaleja puhetapoja ja ideoita hyödynnettiin neuvoteltaessa kansallisista politiikoista talouskriisin aikana?

Vastatakseen näihin kysymyksiin, tämä väitöskirja tutkii globaaleja kriisidiskursseja. Nämä diskurssit ymmärretään paitsi puheeksi myös kriisiin kytkeytyväksi tiedoksi ja toiminnaksi. Tässä työssä kriisidiskursseja lähestytään alhaalta ylöspäin tarkastelemalla niitä mekanismeja, joiden kautta niistä tuli osa kansallista politiikkaa ja tekijöitä, jotka laukaisivat niiden käytön paikallisesti. Teoreettisesti tutkimus pohjautuu diskursiivisen institutionalismin ja episteemisen hallinnan perinteisiin. Empiirinen analyysi keskittyy kriisidiskurssin keskeisiin elementteihin, niiden leviämiseen ja siihen, miten näitä elementtejä hyödynnettiin osana Portugalin ja Espanjan parlamentti- ja mediakeskusteluja. Empiirisen analyysin tulokset esitellään väitöskirjan neljässä tutkimusartikkelissa.

Artikkeli I analysoi sitä, kuinka muihin maihin viitattiin keskusteltaessa kansallisista politiikoista talouskriisin aikana. Artikkeli II tarkastelee sitä, miten globaaliksi iskusanaksi muodostunutta käsitettä budjettikuri tai kuripolitiikka (englanniksi austerity) hyödynnettiin osana kansallisia poliittisia neuvotteluita. Artikkeli III tutkii sitä, kuinka kansainvälisten lainanantajien eli Troikan interventiosta keskusteltiin Portugalissa. Artikkeli IV analysoi sitä, kuinka Euroopan Unionin uudesta talouspolitiikan koordinaatiotyökalusta, nimeltään European Semester, on tehty selkoa kansallisessa poliittisessa päätöksenteossa.

Kaikkien osatutkimusten empiirisessä analyysissä on hyödynnetty sekä laadullisen että määrällisen analyysin työkaluja. Määrällisistä metodeista tämä tutkimus käyttää sisällön analyysiä ja frekvenssiesiintymien laskentaa selvittääkseen missä määrin globaalin kriisidiskurssin elementit olivat osa kansallista politiikkaa ja kuinka niitä hyödynnettiin. Laadullisista menetelmistä tämä tutkimus käyttää diskurssianalyysiä ja retoriikan analyysin välineitä analysoidakseen, kuinka globaaleja kriisidiskursseja hyödynnettiin kansallisessa poliittisessa argumentaatiossa, oikeuttamassa poliittisia ratkaisuja ja markkinoitaessa erilaisia poliittisia ideoita paikalliseen kontekstiin.

Empiiristen analyysien pohjalta on muotoiltavissa kolme tutkimuksen päätulosta. Ensiksi, erilaiset tavat konstruoida referenssimaat kansallisissa konteksteissa talouskriisin aikana selittyvät ensisijaisesti sillä, kuinka nämä maat asemoivat itsensä osaksi Eurooppaa ja eurooppalaista yhteisöä. Kussakin kansallisessa kontekstissa on ymmärrys siitä referenssimaiden joukosta, johon oma maa kuluu. Tästä syystä näihin maihin viittaaminen on poliittisesti hyväksyttävää ja tehokasta tehtäessä selkoa oman maan talouden tilasta suhteessa muihin järjestelmiin sekä mahdollisista uusista politiikan ratkaisuista. Toiseksi, tutkimus osoittaa, että maan kulloinenkin taloudellinen tila ei yksin selitä sitä, että poliittisissa keskusteluissa aletaan hyödyntää globaalia kuripolitiikan käsitettä. Päinvastoin, kun budjettikuri oli muodostunut globaaliksi politiikan muotisanaksi, toimijat kansallisissa konteksteissa tarttuivat tähän termiin ja hyödynsivät sitä pyrkimyksissään ajaa erilaisia budjettikuriin tähtääviä politiikan uudistuksia. Kolmanneksi tutkimus esittää, että kansainväliset organisaatiot eivät ole todellisia toimijoita kansallisessa poliittisessa päätöksenteossa edes silloin, kun maa on pakkotoimenpiteiden kohteena. Kansainvälisillä organisaatioilla oli rooli kansallisissa konteksteissa talouskriisin aikana, mutta tämä rooli toteutui kansallisten poliittisten kädenvääntöjen ja neuvotteluiden kautta. Näissä neuvotteluissa politiikkaan vaikuttamaan pyrkivät toimijat viittasivat kyseisiin organisaatioihin argumentoinnissaan. Juuri poliittisissa kenttäkamppailuissa erilaiset toimijat kotouttivat organisaatioiden asettamat ehdot ja ideat osaksi kansallista politiikkaa. Kansalliset toimijat viittasivat strategisesti kansainvälisten organisaatioiden markkinoimiin globaaleihin ideoihin ja muiden maiden politiikkoihin myös tulkitessaan kansainvälisiä suosituksia ja toimenpidevaatimuksia, joita kansallisvaltioiden oletettiin noudattavan. Toisin sanoen globaaleja diskursseja hyödynnettiin resursseina tai aseina tehtäessä selkoa kutakin maata koettelevasta talouskriisistä, siihen kytkeytyneistä ongelmista ja tavoiteltavista politiikan ratkaisuista. Globaaleja kriisidiskursseja hyödynnettiin strategisesti ja päämäärähakuisesti oikeutettaessa erilaisia kansallisia säästötoimenpiteitä ja epämukavia uudistuksia, kuten säästöpolitiikkaa.

Tämä väitöskirja lisää teoreettista ymmärrystä niistä mekanismeista, joiden kautta toimijat eri kansallisvaltioissa soveltavat ja hyödyntävät globaaleja politiikan diskursseja. Vaikka kansallinen päätöksenteko saisi vaikutteita globaaleista kriisidiskursseista, se ei tarkoita, että kansalliset poliittiset päättäjät olisivat passiivisia näiden diskurssien edessä. Päinvastoin. Kuten väitöskirjan osajulkaisut ovat osoittaneet, kansalliset toimijat pyrkivät aktiivisesti hyödyntämään näitä diskursseja pyrkiessään edistämään omia poliittisia intressejään ja näkemyksiään. Tästä syystä politiikkojen globalisoitumisen sijaan olisikin mielekkäämpää puhua politiikkojen samantahtisuudesta. Kansallisvaltiot seuraavat ja reagoivat samanaikaisesti globaaleihin politiikan muoteihin, mutta säilyttävät silti etäisyyden toisiinsa. Vaikka eri ideat, ulkoiset mallit ja kansainväliset suositukset ja jopa kansallisvaltioille asetetut ehdot leviävät maailmanlaajuisesti, niiden tulkinta ja sitä kautta kotouttaminen tapahtuu aina kansallisissa konteksteissa.

CONTENTS

1 Introduction 17

2 Earlier research on the economic crisis: from causes and consequences to management and discourses 20

3 Theoretical Framework 23

4 Research design 33

5 Data and Methods 38

6 Results 44
- 6.1 National positioning within the crisis 44
- 6.2 Enactment of catchwords 46
- 6.3 Taming and legitimizing international discourses 47

7 Discussion 50

8 References 55

9 Publications 67

List of Figures

Figure 1 Analytical framework 41

List of Tables

Table 1 Summary table of the empirical settings 37

ABBREVIATIONS

CSRs	Country-Specific Recommendations
EC	European Commission
ECB	European Central Bank
EU	European Union
GDP	Gross Domestic Product
ILO	International Labour Organization
IMF	International Monetary Fund
MoU	Memorandum of Understanding
MPs	Members of Parliament

ORIGINAL PUBLICATIONS

Publication I	Pi Ferrer, L., Alasuutari, P., and Tervonen-Gonçalves, L. (2019). Looking at others in national policy-making: the construction of reference groups in Portugal and Spain from 2008 to 2013. European Politics and Society 20 (3), 333-347. http://doi.org/10.1080/23745118.2018.1540157
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1 INTRODUCTION

The 2008 economic crisis was a crucial event affecting economy, politics and society globally. As the former head of the Federal Reserve of the USA said:

> "I honestly believe that September and October of 2008 was the worst financial crisis in global history, including the Great Depression" (The Times, 28 August 2014).

The collapse of Lehman Brothers, a global financial services firm and the fourth largest investment bank in the USA, shook the financial markets worldwide on September 15, 2008. This was especially evident in terms of the annual percent of Gross Domestic Product (GDP) growth, for instance, world GDP growth went from being 4.219 per cent in 2007 to be at the level of -1.733 per cent in 2009. But a much more drastic impact was seen in the European Union (EU) with rates of 3.08 per cent in 2007 and -4.349 per cent in 2009, and particularly in southern Europe. Portugal and Spain, countries that are in special focus in this study, went from rates of 2,507 per cent in 2007 to -3,112 in 2009, in the case of Portugal, and from rates of 3,605 in 2007 to -3,763 in 2009, in the case of Spain (see World Bank Database[1]).

The economic crisis had dire consequences in many areas. In the banking sector, banks were facing a threat in repeated ratings downgrades, widening funding spreads and declining equity prices (Chan-Lau et al., 2015), despite support from central banks and national governments to soften the effects and avoid bankruptcy (Panetta et al., 2011). Another area where the impact of the crisis was important was the industrial sector. According to Chowdhury (2011), the drop in global consumption demand, focused primarily on automobiles and white goods, led to a precipitous fall in global industrial production. The world industrial production was dropping at 27 per cent annualized pace in February 2009 (World Bank, 2010). At a societal level, the consequences of the crisis caused much hardship such as negative employment creation (ILO, 2009), and an enormous rise in the unemployment rate. Indeed, this economic turn generated social instability, with an increase of people at risk of poverty and social exclusion. In this respect, it has been argued that in most EU

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[1] Data on GDP growth (annual percent) were obtained through the database of the World Bank https://data.worldbank.org/indicator/NY.GDP.MKTP.KD.ZG?locations=EU-US-1W-PT-ES

countries poverty increased significantly between 2008 and 2012 (Doemeland and Inchauste, 2016).

However, as the impact of the crisis was global, the discourses—reactions, explanations, solutions and expectations—were likewise global. This is relevant as the rationale by which the crisis was framed, observed, debated and managed was not made in isolation– that is, it was not created separately in every single country. This implied that when a country was hit and affected by crisis, the public discussion, for instance the media, reported not only the national situation and its management, but also the situation and responses in other countries. For example, in the Spanish media there were headlines on how the crisis also affected other countries such as Germany (El País, 20 January 2013), or how the unemployment rate increased to unprecedented levels in the Eurozone (El País, 31 January 2012) and how, within the Eurozone, Greece and Spain were fighting for pole position (El País, 11 October 2012). In Portugal the global discussion was also reported on a daily basis by referring to the reactions of other countries. For instance, how Spain blamed Germany for a worsening debt crisis (Jornal de Negócios, 12 July 2011), or how conversely Germany was dissatisfied with the slow progress of the peripheral countries to exit the crisis (Jornal de Negócios, 16 December 2012). Yet the predictions, recommendations and even the obligations from the international organizations were also the bread and butter of the public discussions. For example, the predictions of the International Monetary Fund (IMF) on the risk of contagion of the debt in many European countries such as France, Spain and Italy were reported on (Jornal de Negócios, 27 July 2011). The requirements of the Troika, issued by the European Commission (EC), the European Central Bank (ECB) and the IMF acting as international lenders, were also stated in the media discussion. For instance, on how the Portuguese government was thinking of implementing alternatives because of the pressure of its citizens and the Troika (El País, 26 September 2012). But there was also discussion on the creation of new international mechanisms to combat the crisis, such as the mechanisms of assistance and coordination approved by the EU to stabilize and guarantee sustainability in the Eurozone (Jornal de Negócios, 25 March 2011). All these global discourses and transnational knowledge were a way to construct the reality of the crisis – that is how actors through their conceptions and perceptions of the situation play a part in defining how we understand reality (Berger and Luckmann, 1967).

But how were those global discourses evoked and utilized when handling domestic politics during the economic crisis? In this dissertation, I study the global discourses, understood not only as talk but also as actions and knowledge, from a bottom-up perspective. I analyse the mechanisms by which they became part of the national context and what triggered their use in national arenas. Theoretically, I approach the question from a discursive institutionalist and epistemic governance perspective to investigate how global discourses are utilized in national contexts. A significant number of studies within the neoinstitutionalist research tradition has already pointed out how ideas, discourses, models and paradigms emerge and diffuse globally, becoming part of transnational governance (see e.g. Stone, 2001; Simmons and Elkins, 2004; Jenson, 2010; Babb, 2013; Della Porta and Mattoni, 2014a; Dellepiane-Avellaneda, 2015; Syväterä and Qadir, 2015). Yet it is crucial to investigate the local context to understand the means by which the global circulation of discourses occurs. Empirically, I study prominent elements of the crisis discourses that spread globally to make sense of the way they were invoked in parliamentary debates and media reports in Portugal and Spain[2] . This dissertation is composed of four articles[3] . Article I studies how the references to other countries were used in debating national policies. Article II focuses on the spread and adoption of the catchword 'austerity'. Article III analyses how national actors handled the coercion on the part of the Troika at the national discursive level. Article IV shows how a new coordinative political tool - European Semester - was managed in national policy-making. This dissertation aims to contribute to the understanding of the global diffusion of discourses by shedding light on the role that they play in domestic settings, in other words, by analysing what happens locally I aim to make a contribution to our understanding of the global. The dissertation is organized as follows. In the next section, I review more extensively the principal ideas and research done on the economic crisis to contextualize my study. Following that, I explain and revise the theoretical approaches relevant to my research: neoinstitutionalism, discursive institutionalism, domestication and epistemic governance. Then I set out my research design with my research questions and aims. This is followed by a section addressing the empirical data and the methods used. After that, I proceed to present the main results of the dissertation. Finally, I present the contribution of this thesis, concede its limitations and make proposals for future research.

[2] Article IV also uses parliamentary data from France and Finland.

[3] In this introductory chapter, I refer to the four original articles included in the dissertation by Roman numerals (I-IV): Article I (Pi Ferrer et al., 2019), Article II (Pi Ferrer and Alasuutari, 2019), Article III (Pi Ferrer and Rautajoki, 2019), and Article IV (Rautajoki and Pi Ferrer, submitted).

2 EARLIER RESEARCH ON THE ECONOMIC CRISIS: FROM CAUSES AND CONSEQUENCES TO MANAGEMENT AND DISCOURSES

The 2008 economic crisis and its aftermaths have become an increasingly prominent subject of study in many fields of research in recent years. A considerable proportion of the literature has addressed the economic crisis from a realist perspective, where researchers aim to measure how serious this crisis was, where and how it originated as well as its impacts. From an economic point of view, although it is generally accepted that it originated in the USA due to excessive risk-taking in the financial system (Hudson and Maioli, 2010), many scholars have claimed that the causes were various (see e.g. Helleiner, 2011; Kotios and Galanos, 2012). For instance, boom and bust in housing markets, structured finance and its securitization have been named as key elements in triggering the crisis (see e.g. Roubini and Mihm, 2010). However, the monoculture of economics and risk models causing a dangerous homogeneity of economic behaviour, and the macroeconomic imbalances and insufficient policy coordination have also been cited as crucial causes (Aiginger, 2009; Bronk, 2011). According to Kotz (2009), the global economic crisis has generated an important crisis in the institutional structures of neoliberal capitalism. Other scholars have analysed its consequences in various arenas, such as in health problems with especial focus on arguments about the deterioration of health in general and the increase suicide rates (see e.g. Chang et al., 2013; Mucci et al., 2016). In the tourism sector, there has been an emphasis on studying the decrease in the sector and the impact of this on many national economies (see e.g. Ritchie et al., 2010; Smeral, 2010). Regarding the consequences to economy and investments, researchers have analysed the impact on public funding and innovation projects (see e.g. Paunov, 2012). Finally, others have offered interpretations of the impacts of the crisis on consumption (see e.g. McKibbin and Stoeckel, 2010).

In this dissertation, I do not enter into studying the causes and consequences of the crisis, but rather how the crisis has been discussed and managed in national contexts. Earlier research has also addressed how various actors managed the economic crisis and their reactions to it. From this perspective, there has been a special focus on the responses of central banks. Fligstein et al. (2014) have claimed that the answers and actions of crucial actors within central banks were inhibited as the prevalent economic paradigms were deficient. Yet Rosenhek (2013) has argued that the American Federal Reserve System and the ECB diagnosed and described the crisis in manners that challenged the prevailing conceptions and assumptions of the economic field and as a way that served to ratify them. In addition, Riaz et al. (2016) have pointed out how elite actors, such as the CEOs of US banks, used rhetorical strategies to protect their dominant positions in the field during the crisis, for instance, by strengthening their epistemic authority and reducing the authority of others. Similarly, by analysing the mainstream rhetoric of different actors in relation to the crisis, Riaz et al. (2011) have suggested that there were many rhetorical strategies to address and frame justifications for solutions: while academics called for policy change, resorting mostly to rhetorical strategies that include the use of past scenarios and blame, banks addressed changes in practices, mainly turning to future scenarios, finding specific others to blame and evoking expert authority. Others, instead of placing emphasis on the financial actors, have paid attention to other actors, such as citizens. For instance, Stanley (2014) has analysed crisis narratives of middle-class homeowners. In so doing, he has claimed that the shared popular experiences and wisdom were deduced from the personal level to make sense of the state level.

Considerable attention has also been paid to the management of and responses to the crisis by political actors. Within this perspective, Brorström (2012) has claimed that policy-makers in the local context took the crisis as an opportunity to initiate change. According to Carstensen (2017), policy-makers responded to the challenges of the crisis with a readjustment and redistribution of existing institutional elements to adjust new institutional setups to the prevailing circumstances. In general, scholars studying crisis management in leaders' decision-making have pointed out strategies of policy learning, blame games and agenda setting (see Boin et al., 2016), and the challenge that this type of context poses to the institutions that they serve ('t Hart, 2013). Moreover, from an actor-centred constructionist approach the crisis is a moment 'where mass public agents and political elite try to persuade each other over 'who they are' and 'what they want" (Widmaier et al., 2007: 756).

This dissertation also takes a constructionist approach by analysing political actors as an empirical focus. Although this may raise problems as to how to frame and interpret the crisis within different institutional contexts (Widmaier et al., 2007), the capacity of actors to affect change during this period of crisis was limited to the interpretations of the crisis that became dominant (Baker, 2015). These interpretations were driven by the evidence of a particular crisis and the institutional responses to it (Baker, 2015). Following this line of thought, it has been argued that national policy-makers were reluctant to do anything beyond what was decided internationally (Carstensen, 2011b). Therefore, crisis discourses reflect similar traits and raise related concerns globally (Kelsey et al., 2016).

Yet there is an important amount of research showing the political and historical importance of the crisis reactions and responses as a transformative and transnational episode (see Baker and Underhill, 2015; Braun, 2015; Dellepiane-Avellaneda, 2015; Moschella, 2015; Underhill, 2015). It has been claimed that ideas played a decisive role as they were resources to rely on for a change. They helped to shape our understanding of the situation, its possible explanations as well as political and institutional solutions and blueprints (Blyth, 2002; Baker and Underhill, 2015). Some authors have pointed out that the crisis gave rise to a series of different arguments and interpretations of the event in different spheres and for different purposes (see Widmaier et al., 2007; Schmidt, 2014; Dellepiane-Avellaneda, 2015). However, the global dimension of the crisis triggered global solutions, perspectives and discourses, some of these shaped by international organizations such as the IMF (Moschella, 2015). In that sense, policy ideas became embedded in a transnational policy community (Underhill, 2015), in which international organizations and transnational policy processes interplayed with domestic discourses (Baker and Underhill, 2015).

The arguments evinced in the last-mentioned studies advance our understanding of how crisis discourses were globally shared and spread. However, despite the increasing academic attention to the economic crisis from a transnational governance approach, little research has been done on how global discourses promoted and spread in the aftermath of the crisis are employed at the grassroots level of domestic politics. In that sense, earlier research has neglected the actual procedures and means by which the global discourses enter into national spheres and become part of domestic discourses. By studying how national policies on the crisis are discussed in domestic contexts, this thesis aims to contribute to bridging this gap.

3 THEORETICAL FRAMEWORK

In order to frame and interpret how the crisis discourses spread worldwide and were embraced in local contexts, we need to contemplate he role of institutions and actors not only in creating and diffusing those discourses, but also in adopting them. Over the last three decades, there has been an increased recognition of the importance of institutional contexts in affecting social activity that has characterized social scientific thinking (Meyer, 2009). The theoretical background of this dissertation lies in neoinstitutionalism. Although this is a broad theory with various analytical approaches, neoinstitutionalist research 'shares the conviction that the social world and actors' decision-making cannot be properly explained without taking into account the role of institutions in constituting the conditions under which actors make their moves and how they expect others to behave' (Alasuutari, 2015: 164). This is divided into different analytical approaches or schools of thought: historical institutionalism, rational choice institutionalism and sociological institutionalism (Hall and Taylor, 1996). These define institutions, behaviour, as well as the origins of and transformations within institutions in different ways (Alasuutari, 2015).

Historical institutionalism concentrates on how institutions, understood as sets of regularized practices with rule-like qualities, organize action and outcomes (Schmidt, 2011a: 50). It focuses on how the historically evolving characteristics of the institutional environment guide interest and subsequent behaviour in contingent, path-dependent manners (Skocpol, 1979). The objects of explanation for this perspective are the history of political institutions and their component parts and practices, emphasizing the development and operation of institutions and their path-dependencies, which have their origins in the outcomes of deliberate choices and historically unique initial conditions (Hall and Taylor, 1996; Thelen, 1999; Schmidt, 2011a). The majority of historical institutionalist scholarship 'consists of cross-national comparisons of public policy, typically emphasizing the impact of national political institutions structuring relations among legislators, organized interests, the electorate and the judiciary' (Hall and Taylor, 1996: 938).

Rational choice institutionalism utilizes a characteristic set of behavioural premises within institutions defined as structures of incentives (Schmidt, 2010). It proposes that actors have a fixed set of preferences that they aim to achieve by behaving strategically, employing extensive calculation (Hall and Taylor, 1996). In that sense, political outcomes are determined by the role of strategic interaction among actors. This may imply that the final outcome may be collectively sub-optimal due to various actors pursuing their aims (Hall and Taylor, 1996). Such interactions are organized by the institutions delimiting the range and alternatives on the choice-agenda or giving information and enforcement mechanisms that reduce uncertainty about the corresponding behaviour of others and allow 'gain from exchange' (Hall and Taylor, 1996: 945). Yet rational choice institutionalism also emphasizes that actors' moves are based on their anticipations about how others are expected to act (Hall and Taylor, 1996; Ingram and Clay, 2000; Schmidt, 2008).

Sociological institutionalism emphasizes that institutions constitute actors, defining their identities and goals, instead of just constraining them, and that interests emerge within particular normative and historical contexts (Powell and DiMaggio, 1991: 7). It defines institutions in a much broader sense than historical institutionalism or rational choice institutionalism; sociological institutionalism institutions are approximately likened to culture and society (Alasuutari, 2015). In that sense, sociological institutionalism argues 'that agents fairly unthinkingly enact global scripts rather than behave in a truly rational manner' (Alasuutari, 2015: 165). Institutions affect actors' behaviour as actors internalize the norms and rules associated with particular institutional contexts (Hall and Taylor, 1996). However, this does not mean that in sociological institutionalism actors are not goal-oriented, but rather what actors perceive as 'rational action' is itself socially constituted (Hall and Taylor, 1996). In so doing, institutions not only condition 'what one should do, but also what one can imagine oneself doing in a given context' (Hall and Taylor, 1996: 948). The institutional procedures and forms should be considered as culturally specific practices (Hall and Taylor, 1996). Sociological institutionalism seeks to explain 'why organizations take on specific sets of institutional forms, procedures or symbols systems, cognitive scripts, and moral templates that provide the 'frame of meaning' guiding human action' (Hall and Taylor, 1996: 14). In addition, sociological institutionalism has paid attention to global isomorphism (DiMaggio and Powell, 1983), noticeable in the way governments emulate each other's policy models and in the diffusion of worldwide models even to nation-states for which they are not appropriate in their current circumstances (Krücken and Drori, 2009; Alasuutari, 2015).

All three neoinstitutionalist perspectives take a different approach to explaining how institutional practices originate and change. While rational choice institutionalism explains the development of an institution by stressing the efficiency with which it provides the material purposes of those who embrace it, sociological institutionalism claims that organizations often accept new institutional practices because doing so improves the legitimacy of the organization and its actors (Hall and Taylor, 1996). On the other hand, historical institutionalism can be seen as being located somewhere in between the previous two as it utilizes 'calculus' and a 'cultural' approach to explain how institutional practices originate and change (Hall and Taylor, 1996). However, historical institutionalism has devoted less attention than the other two to understanding exactly how institutions affect actors' behaviour (Hall and Taylor, 1996). The three approaches take institutions as given and external to actors (Schmidt, 2008). Institutional rules serve as constraints, whether by historical paths that shape action, rational incentives that structure action, or social norms that frame action (Schmidt, 2008). The same goes for action in institutions; the three approaches conform to a rule-bound rationale: an interest-based logic of calculation, a norm-based logic of appropriateness, or a history-based logic of path dependence (Schmidt, 2008).

From the aforementioned neoinstitutionalist perspectives, my research relies theoretically on the sociological institutionalism of the Stanford School, or World Society Theory. This school of thought has as a core question, why does social organization tend to be globally isomorphic despite the diversity of local needs, perceptions and resources? (Buhari-Gulmez, 2010: 253). Within this perspective, the majority of studies have been on global isomorphism by analysing the global diffusion of models such as women's rights (Ramirez et al., 1997), environmental policies (Frank et al., 2000), and mass education (Meyer et al., 1992) among others. These models or scripts, which are shared among institutional and individual actors exist because actors take part in the same culture, which world society theory has called 'world culture' (Meyer et al., 1997; Meyer, 2010). These world cultural rules constitute actors, including states, organizations and individuals and define legitimate or desirable goals for them to pursue (Finnemore, 1996: 326). According to Meyer et al. (1997), we live in a world whose societies, organized as nation-states, are isomorphic in many unexpected ambits and change surprisingly similar way. This is because we conceive of and acquiesce to 'world models', in other words, models that are treated as universal principles, applicable regardless of the variation in domestic contexts (Boli and Thomas, 1997; Meyer, 2009). Such 'world models' shape nation-states' structures, identities and their behaviour via worldwide cultural and associational processes (Alasuutari and Rasimus, 2009). According to world society scholars, these models are rooted in nineteenth-century Western culture but have since globalized, carried by the infrastructure of world society, and come to be expressed in the multiple ways in which particular groups relate to universal ideals (Lechner and Boli, 2008: 6). However, apart from these shared values and principles guiding institutions and actors, there are also new ideas and models circulating throughout the globe, the construction and promotion of which also appeals to shared premises (Alasuutari, 2014a: 270).

While research on world society investigates how world society emerges, spreads globally and what its integral elements are, studies in a national context explore how and to what extent state, society and individual are influenced by world society (Schofer and McEneaney, 2003). This dissertation follows these ideas by looking at national policy-making. At this level, national actors want the new legislation and reforms to look good in the eyes of the international community, so they appeal to all sorts of transnational ideas and world models because these appeal to the people, are rational and convincing (Alasuutari and Vähä-Savo, 2018). Therefore, local governments and authorities adopt these models with outstanding conformity and, consequently, different nation-states resemble each other in structural and institutional respects, although there are differences in terms of culture as well as resources (Bradley and Ramirez, 1996; Elliott, 2007; Meyer, 2007). Yet, as Boli (2005) has claimed, even though world culture gives rise to much homogenization, its impact is limited and shaped by local forces and historical traditions. For this reason, although we cannot talk about identical policies, nation-states end up synchronizing national trajectories with those of other countries not only because world culture penetrates national realities, but indeed, because actors in nation-states keep an eye on what is going on elsewhere (Alasuutari, 2014a, 2016). Therefore, actors in a national context pursue their interests and points of view by paying attention to the international community, making these models from other countries into notable examples and showing the evidence of their success (Cortell and Davis, 2000; Dolowitz and Marsh, 2000; Acharya, 2004; Alasuutari, 2014b).

In this line of research it has been argued that political decision-making is interdependent, meaning that 'policy decisions in a given country are systematically conditioned by prior policy choices made in other countries' (Simmons et al., 2008: 7). Interdependent decision-making has been approached as policy diffusion, in which the object is to focus attention on the circulation of ideas from an origin to a destination (Strang and Meyer, 1993; Simmons and Elkins, 2004). Scholars have identified four mechanisms by which ideas spread globally: coercion, competition, learning and emulation (Simmons et al., 2008: 2). Coercion implies an asymmetry of power in which policies diffuse from a powerful actor to a weak one (Simmons et al., 2008). The second mechanism of diffusion could be 'competition among governments for capital and market share for their domestic goods and services' (Simmons et al., 2008: 17). Applying this strategy, governments have important incentives to choose 'market friendly' policies to be as competitive and attractive for the global investments as possible (Simmons et al., 2008: 17). Learning involves 'a change in beliefs or a change in the strength of one's confidence in existing beliefs, resulting either from observation and interpretation or from acquisition of new theories or behavioural repertoires' (Simmons et al., 2008: 25). Finally, emulation as the fourth mechanism draws on research wherein the attention has been on the individual, organizational and social movement adoption of innovations (Simmons et al., 2008). This mechanism derives from 'world polity' theory, where there is a shared consensus on what is 'appropriate'. Hence, it is the logic of appropriateness that diffuses around the globe (Simmons et al., 2008: 32). According to Strang and Meyer (1993) diffusion is shaped and enhanced by cultural similarities among actors as well as by theorized models and practices– that is, abstract accounts that are easily spread. Furthermore, similar to policy diffusion, scholars have also talked about policy transfer to explain analogous phenomena (see e.g. Dolowitz and Marsh, 2000). However, while the diffusion literature stresses structure, the policy transfer literature stresses agency (Marsh and Sharman, 2009).

Interdependent decision-making has also been addressed by analysing whether and how policies converge (Bennett, 1991; Jordan, 2005; Knill, 2005), or diverge (McBride and Williams, 2001; Lodge, 2005). If diffusion refers to the process, convergence and divergence can be understood as possible outcomes (Busch and Jörgens, 2005; Holzinger and Knill, 2005). According to Bennett (1991: 215), there are four processes through which convergence may occur: emulation, where national actors copy actions from elsewhere; elite networking, where transnational policy communities play a role in convergence; harmonization through international regimes, where there is a perceived need to co-operate, and penetration by external actors and interests. Although national decision-making is interdependent, policies do not necessarily converge; rather policies share a process whereby ideas are exchanged, creating waves of travelling ideas and policies to which governments react in different ways. This process has been studied in policy transfer research, in which it is argued that there is an important transference of policies causing a process of policy adoption across different nations (Dolowitz and Marsh, 2000). Yet this does not imply that local actors remain passive; they modify transnational norms to suit their local normative practices and beliefs (Acharya, 2004). Following this line of thought, Alasuutari (2014b) has suggested that actors in nation-states follow national trajectories even when they propose reforms resulting from the reaction to the spread of models and ideas. Therefore, it is more appropriate to talk about synchronization of national policies rather than policy convergence (Alasuutari, 2014a, 2016).

Although this dissertation draws heavily on world society theory and the diffusion of global models and ideas as starting points to describe global isomorphism and the spread of scripts and models, I conceive of actors as agents in the process of diffusion. In that sense, I subscribe to Schmidt's argument (2008), according to which one of the problems not only of sociological institutionalism, but also of all the three neoinstitutionalisms is that they treat agents as being fixed in terms of norms or preferences, suggesting that they are 'unthinking' actors without agency. All of them have been much better in explaining continuity than change, as institutions serve primarily as constraints (Schmidt, 2010). They explain institutional change as a result of exogenous shocks (Schmidt, 2010). However, more recently they have started to 'endogenize' institutional change, and thus to suggest that actors within institutions do indeed play a part in the process. In so doing, they have turned to ideas and discourses (Schmidt, 2008), thereby challenging the basic tenets of the three neoinstitutionalisms on ontological bases: what institutions are, how they are created, maintained and changed; and on epistemological bases: what we can know about institutions (Schmidt, 2008: 313). This outcome of taking account of ideas and discourses has resulted in a new institutionalist perspective called discursive institutionalism (Schmidt, 2008; Schmidt, 2010). Discursive institutionalism treats institutions as the context within which actors think, speak and act, and also as the outcome of actors' thoughts, words and actions (Schmidt, 2008). Instead of explaining action in institutions as the product of actors' rationally calculated, path-dependent, or norm-appropriate adherence to rules, action in institutions is explained as the process by which actors create and maintain institutions by using discursive abilities (Schmidt, 2008: 314). According to Schmidt (2008: 314), these discursive abilities represent the logic of communication, which enable agents to think, speak, and act outside their institutions even as they are inside them. This communication logic is one of the reasons why discursive institutionalism affords a better explanation of institutional change than the other three neoinstitutionalist perspectives. The aim of discursive institutionalism is to show empirically how, when, where and why ideas and discourse matter for institutional change, and when they do not (Schmidt, 2010: 21). Within the discursive institutionalist approach, there are scholars who tend to focus exclusively on the ideas generated, legitimated and deliberated by public actors, leaving the interactive process of the discourse implicit (Schmidt, 2008). On the other hand, scholars who focus their attention on discourses address the discursive interaction, and thus the representation and communication of ideas within given institutional contexts to demonstrate how they influence political and social reality (Schmidt, 2008).

Those concentrating on ideas have analysed how they influence policy outcomes (see e.g. Jacobs, 2009; Béland and Cox, 2016). In this context, the concept of idea can be defined as a 'web of related elements of meaning' (Carstensen, 2011a: 600). However, not all ideas achieve the same success and nor do they acquire the same importance. An idea may be considered successful when it gathers enough critical support to be adopted as a policy (Béland and Cox, 2016). Some of the qualities that ideas should represent to become successful are ambiguity or polysemy: in other words, ideas that mean different things to different people (see e.g. Jenson, 2010; Béland and Cox, 2016). These qualities generate conflicts and contradictions regarding their application and understanding, but at the same time, these qualities render such ideas more appealing to a greater number of people. Apart from ambiguity and polysemy, Cox and Béland (2013) have advocated valence as another important quality, which refers to the attractiveness of an idea.

Some scholars have for their part focused on the emergence and transformation of ideas. According to Carstensen (2015: 284) 'ideas do not emerge from an absolute origin but instead are created when a set of ideational elements are yoked together by political actors', creating what he calls 'ideational novelty'. Their meanings are constituted by infinite connections back in time (diachronic) or across other ideas (synchronic) (Carstensen, 2015). As their meanings are based on their relation to other ideas, and as these are never totally fixed (Laclau and Mouffe, 1985), ideas may change (Carstensen, 2015). However, ideas do not change spontaneously by themselves; actors need to activate and make use of them strategically for a political purpose (Béland, 2005). Carstensen (2011c) has argued that actors are 'bricoleurs' (a term firstly used by Levi-Strauss, 1962) as they recombine elements from the existing repertoires of ideas to create new meanings. At the same time, actors also attempt to influence other actors' normative and cognitive beliefs through the use of ideational elements (Carstensen and Schmidt, 2016: 318) Therefore, ideas are in constant flux, come from everywhere and are employed in different manners and for different purposes (see Kingdon, 1984; Carstensen and Schmidt, 2016).

According to Kingdon (2003), the emergence of new circumstances is what causes new ideas to influence politics or find an answer to political problems. In that sense, crises lead to preparing the ground for the emergence of new ideas due to a different and unstable situation (Baker and Underhill, 2015; Anstead, 2017). In this context of uncertainty and instability, actors look for new discourses and interpretations to explain the particular circumstances in which they are absorbed, and to find proper solutions to deal with them (Chwieroth, 2010). Hence, on the bases of ideational scholarship, a crisis is a necessary condition for an idea to be adopted in a 'recipient country', therefore, we might expect that the frequency with which domestic politicians invoke a certain idea follows a national pattern depending on the circumstances of each country. However, this dissertation will show that when certain ideas become global catchwords they start to be used worldwide regardless of the domestic situation.

According to Schmidt (2011a: 82), concentrating on ideas gives some inkling as to 'why institutional changes occur, with the tracing of change in ideas over time that presage the institutional shifts', but ideas cannot explain the dynamic of institutional change or continuity. It is also problematic to study how ideas go from individual to collective action without focusing on discourses (Schmidt, 2011a). As was the case with ideas, a discourse also cannot be considered in isolation, as 'it requires agents who articulate and communicate their ideas that may involve discussion, deliberation, negotiation, and contestation' (Schmidt, 2011b: 115). When it comes to what makes for a successful discourse, Schmidt (2008) has identified four aspects: relevance to the issue at hand, adequacy, applicability, appropriateness and resonance. Yet discourses succeed when speakers address their remarks to the right audience, at the right time and in the right ways (Schmidt, 2008; Schmidt, 2014).

From the perspective of the above-mentioned theoretical approaches, there are important aspects that remain black boxes. On the one hand, world society theory and global diffusion encounter the problem of conceptualizing local-global interplay in local contexts – that is, to explain how diffusing global models and ideas pervade the national sphere and how they are integrated (see also Alasuutari and Alasuutari, 2012). If with these theories one can explain how and why common global scripts, models, policy fashions and organizational models have been spread worldwide by approaching the transnational structure from the top-down perspective, one cannot grasp how things happen in local contexts. On the other hand, discursive institutionalism helps in providing theoretical tools to analyse the actors in local contexts. Although this research tradition has focused on the active role of institutional actors by analysing and stressing how ideas and discourses matter, it has left aside the transnational dimension. For instance, even though change and action in institutional contexts ultimately come from within due to discursive interaction among actors, this change may be explained by internal circumstances and not by transnational governance. Therefore, how can we conceptualize the actual practices and processes by which global discourses are incorporated into local spheres by local actors?

To study local processes in global contexts, I complement the explanation of the existing theories with the use of domestication and epistemic governance perspectives, which render comprehensible the ways in which global models are adopted and used in local instances. These theoretical concepts help to keep an eye on the local practices and to conceptualize their dynamism. Following the logic of active agents conceived in discursive institutionalism, domestication also understands local actors as agents in the process of adapting and processing global ideas. Studies on domestication have conceived of the process of adopting a new element as part of an existing field of activities, as an active procedure in which there is a transformation of the home field in question 'domesticating' the newcomer (see Haddon, 2007; Alasuutari and Alasuutari, 2012). In that sense, by suggesting how the local side plays a crucial role, this perspective goes beyond the top-down process in which the policy models and ideas are transferred from the global to the local (Alasuutari and Alasuutari, 2012). For instance, in a similar vein to domestication, it has been suggested that policies are not simply transferred, but rather 'translated' to conform to local circumstances (Czarniawska and Sevón, 1996). According to Alasuutari (2009: 67), domestication implies that first 'external models are never just adopted; when turned into actual practices and incorporated with local conditions their meaning and consequences are different from the original blueprint', and second it underlines 'the role of local actors in adapting to global trends'. This process of adoption of global ideas worldwide entails turning exogenous ideas or 'their' ideas into 'ours' by implementing them in domestic issues in ways that further the interest of local actors (Qadir and Alasuutari, 2013).

In order to explain why neoinstitutionalist theories have been so successful in explaining global isomorphism and to go further in describing otherwise inexplicable similarities in the world, epistemic governance theory has been developed to give an answer to this from a local context perspective (Alasuutari and Qadir, 2014, 2016). Epistemic governance as a theoretical perspective helps to conceptualize how power and governance operate in contemporary policy-making (Alasuutari and Qadir, 2014). It is argued that society and governance are managed through the actors' perceptions of the world and its current challenges (Alasuutari and Qadir, 2014). Epistemic governance consists of three objects or strategies that actors employ: the ontology of the environment, the actors involved and the norms, rules and ideals (Alasuutari and Qadir, 2014). Actors endeavour to present an accurate picture of a certain situation, trying to influence people's understandings of themselves and other actors, and finally, they seek to convince others of the right thing to do and the best way to approach the issue (Alasuutari and Qadir, 2014). The three objectives appear in combination in the discussion and provide a more plausible description of politics and policy-making (Alasuutari and Qadir, 2014).

In that sense, Alasuutari and Qadir (2014) have suggested that when actors want to influence policy change, they act upon these three objects by utilizing others' beliefs. Therefore, the epistemic governance approach draws on discursive institutionalism and its conception of actors as active agents: thinking, challenging and maintaining institutions through communicative interaction; but it goes a step further by suggesting the pillars by which actors attempt to establish change or continuity in institutions. These are based on globally shared epistemic assumptions about the social world (Alasuutari and Qadir, 2014). It has been argued that 'this epistemic work is entwined with imageries of the social world not only by affecting people's view of the situation but also by then constituting actors and placing them in that world and by implying what is acceptable and desirable' (Alasuutari and Qadir, 2016: 5). According to Alasuutari and Qadir (2016), there are three imageries by which people make sense of the social world and influence governance. First, there is the imagery of progress, which implies changes in the social world by naturally modernizing according to functional requirements. Second, there is the imagery of competing blocs, which states that the world is divided into competing blocs or civilizations. Third, there is the imagery of hierarchy, which describes a world governed by hierarchically positioned power players (Alasuutari and Qadir, 2016: 7).

Besides discussing how the global crisis discourses were evoked and utilized when handling domestic politics during the crisis, the contribution that this dissertation makes to the theory is twofold. First, by adopting the premise of interdependent decision-making, this dissertation renders comprehensible the rationale through which policy-makers justify their arguments and arrive at their decisions. Indeed, as discussed above, global discourses spread and affect domestic policy, therefore, my goal in this dissertation is not to observe the system through which these reach the domestic context, i.e. how well a particular nation-state is involved in international organizations. Rather, I scrutinize how global discourses are used in domestic politics and the role that they play in discursive processes. Second, from the national actors' point of view, the global economic crisis could be perceived as narrowing down the possible conceptions of the situation and what could or should be done. However, this dissertation will show how the role of national actors is more dynamic and strategic than demonstrated in existing research.

4 RESEARCH DESIGN

Building on the studies and approaches discussed above, this dissertation aims to contribute to the body of research on the global diffusion of policies, ideas, models, scripts and discourses by examining how these pervade national contexts and the role that national actors play in this process. It does so by drawing on the global crisis from a constructionist perspective by adopting a discursive stance in which the attention is on whether and how the global crisis discourses—that is, the transnational knowledge produced and circulated in the aftermath of the economic crisis— were used in the arguments, justifications and ideas put forward by national policy-makers when debating and explaining national policies. By focusing on the discursive process of national policy-making, this study sheds light on the discursive and rhetorical strategies in national governance in general and in crisis governance in particular.

Drawing on the aforementioned discussion, I formulate the research question for my dissertation as follows: *How were global crisis discourses evoked and utilized in domestic politics when managing the crisis?* To address this question and hence to make a contribution to the existing knowledge, the present study scrutinises from a bottom-up perspective the role of different elements from the global crisis discourses in domestic politics during the economic crisis.

The local cases for this investigation are in the European context, more precisely in Portugal and Spain. The reasons for their relevance as cases in this study are diverse. First, the EU provides a significant context since what was first observed as a global crisis turned into a European crisis. It was very persistent and prominent in the Eurozone, particularly in southern European countries. Second, within the European context a variety of arguments, actions and interventions in the aftermath of the crisis were generated and spread. Thus, it is interesting to analyse national cases in this region. Finally, Portugal and Spain constitute good examples of nation-states who suffered from the economic downturn (see e.g. Andrade and Duarte, 2011; Royo, 2013). The governments from both countries initially reacted with demand stimulating measures (see Éltető, 2011), but subsequently made important economic adjustments (Campos Lima and Artiles, 2011), triggering major social discontent and a decline in institutional trust (Torcal, 2014). This was especially evident with important strikes and social mobilizations, such as the protest of the *Geração à Rasca* in Portugal or Spanish *Indignados*, the 15-M movement (see Baumgarten, 2013; Roos and Oikonomakis, 2014). However, the countries' respective points of departure were totally different. Before the economic crisis, Portugal had relatively low rates in terms of growth, struggling with an almost continuous excessive public deficit; whereas Spain had one of the highest economic growth rates in the EU (Éltető, 2011; Mota et al., 2010). This caused financial public debt to become the most important problem in Portugal, which led to rising pressure on the interest rates and a reduction in the demand for government bonds (Freire et al., 2014). In April 2011 Portugal was unable to meet the rising debt commitments and ended up asking for a financial bailout (Afonso et al., 2015; Cardoso and Branco, 2018). By contrast, Spain only received rescue loans from Eurozone funds for the banking sector because of the high private debt and a growth model mainly based on domestic demand and the construction sector (Afonso et al., 2015; Carballo-Cruz, 2011). Moreover, in Spain the major concern was the high unemployment rates, which reached levels of 26 per cent, whereas in Portugal the worst rate was 16 per cent (see also Éltető, 2011).

At the same time, beyond the economic crisis context, they constitute a good pair for comparison among the empirical cases due to many similarities, such as cultural, historical ties. The constitution of democracy after the dictatorships was achieved more or less at the same time, and the same was the case with joining international organizations such as the EU (see e.g. Queirós, 2009; Sardica, 2014). This dissertation is inspired both by what has been called the 'most similar system design' and by the 'most different system design' (Przeworski and Teune, 1970). Therefore, on the one hand it relies upon cross-national comparisons of systems that are as similar as possible. Systems, in this case those of the Iberian countries, constitute the original level of analysis, common systemic characteristics are conceived of as 'controlled for', whereas intersystemic differences are viewed as explanatory variables (Przeworski and Teune, 1970: 33) (Article I). On the other hand, in some cases some crucial differences among both countries were fully considered as relevant factors to be taken into consideration. These included the bailout situation. Therefore, the logic of the 'most different system with the same outcome' was applied (De Meur and Berg-Schlosser, 1994) (Article II).

The analysis is conducted in four different empirical cases with different sub-questions, materials and scope. Article I studies how references to other countries were used in debating national policies during the crisis. This article is based on prior research that has shown how one way of approaching interdependent decision-making, and thus, the global diffusion of policies, is done by studying how national actors justify their decisions by referring to ideas and policies adopted in other countries (see e.g. Alasuutari, 2014a, 2014b, 2016). As explained before, Simmons et al. (2008) have shown that global diffusion can be caused by policy learning or emulation, in other words, national actors normally pay attention to the seeming success of other countries and they follow ideas from their peers to which they consider they have socio-cultural links. From this point of view, it is interesting to study references to other countries made by national policy-makers when debating and justifying new policies and reforms. Moreover, certain countries were stereotyped during the global economic crisis, highlighting a European North-South division even more strongly (see e.g. Tervonen-Gonçalves, 2013; Capucha et al., 2014). Therefore, how and why are certain countries used? What do the references used tell us about the political situation of the country in question?

Article II examines how a fashionable, globally spread term —namely 'austerity'— was used in national policy debates. It starts from the assumption that through a global spread of ideas, new concepts emerge, diffuse and are taken up and deemed relevant in different local contexts. Alasuutari (2016: 163) has suggested that 'actors in different national states are receptive to the same signals – such as signs of economic booms and recessions – and respond to them similarly'. From this perspective, it is relevant to analyse two characteristics. First, the process by which austerity turned into a global catchword and came to be used in ever-new contexts, re-framing and reorganizing political discourses and actual practices nationally; namely the institutional conditions for its adoption and domestication in different national contexts. Second, whether and how the frequency with which domestic politicians evoked austerity follow a national pattern, that is: did the national situation, for instance, whether a government is bailed out or not, account for the increased use of the term?

The global crisis also triggered bailouts: coercion and conditions established for financial assistance from international organizations (the creditors) to nation-states (the debtors) through a process of negotiations. As explained above, coercion can trigger diffusion, thus, policies and ideas diffuse from the powerful actor to the obligated one (Simmons et al., 2008). Therefore, it is interesting to study how local actors managed this 'coercive discourse' when debating and explaining national policies. Article III does so by analysing how the intervention by the Troika in Portugal was handled from a discursive perspective. It starts from existing research that demonstrated that international coercion in national politics activates a tendency of depoliticization – that is, the denial of the political character of decision-making

(Standring, 2018). The paper investigates how government actors of a nation-state cope with coercion applied to them by an external source and how they create justifications and persuasive arguments when debating and reporting new policies in a setting that threatens to compromise national sovereignty and integrity. This is done to determine how common and straightforward the use of depoliticization actually is in political rhetoric dealing with coercion.

Finally, Article IV takes a similar approach to the preceding one. However, instead of focusing on the case of coercion on the part of international organizations in nation-states, it takes the creation of a new economic policy co-ordination tool in the aftermath of the European crisis—that is, European Semester — as its empirical focus. The new policy co-ordination tool confers upon the EU institutions an unprecedented capacity for policy formulation and guidance (Costamagna, 2013: 5). Instead of studying how Member States have adapted to this new policy co-ordination and whether and how the European Semester has been effective (see e.g. Hallerberg et al., 2011; Deroose and Griesse, 2014; Darvas and Leandro, 2015; Hallerberg et al., 2018), this article studies how national actors incorporate the recommendations designed for them discursively in their arguments and justifications. It also examines whether there are differences between domestic settings.

The main research question – *how were the global crisis discourses evoked and utilized in domestic politics when managing the crisis?* – is complex, manifold and can be tackled by conceptualizing many different cases for study. The idea is to generate interpretative explanations for this core question by tackling prominent elements of the crisis discourses that were shared and spread: international comparisons, global catchwords, recommendations and requirements from international organizations, and to examine the mechanisms by which these were incorporated into national discourses. In this dissertation mechanisms are understood as the reason why, for instance, episodes of politics observe causal patterns: 'delimited changes that alter relations among specified sets of elements in identical or closely similar ways over a variety of situations' (McAdam et al., 2008: 308).

I acknowledge that these aforementioned empirical cases not the only possible cases; the global crisis discourses can be observed and studied from various perspectives. However, I argue that these four cases form an interesting set of essential features of global discourses during the crisis and afford an optimal way to implement my thesis dissertation. The aims, research questions and the main findings of the four articles are summarized in Table 1.

Table 1. Summary table of the empirical settings

	Article I	Article II	Article III	Article IV
The main research question	How were global crisis discourses evoked and utilized in domestic politics when managing the crisis?			
Sub-questions	How and why is it that certain countries are evoked in the decision-making process?	How and why has 'austerity' become so popular in political discussions?	How did national politicians domesticate coercion exerted by the Troika and build their justifications and arguments as part of the political persuasion when debating and reporting new policies?	How are the EU's recommendations brought into the national discussion and justified there in the framework of political persuasion?
Aim	To examine how references to other countries are used in national policy-making in the aftermath of the recent economic crisis.	To study the process by which a term turns into a catchword that becomes used in ever-new contexts, re-framing and reorganizing political discourses.	To examine how national politicians handled the aspect of coercion in their national political discourse when in receipt of conditional financial support.	To study how the EU and the recommendations are employed in terms of political rhetoric in the national parliaments and how legitimacy is handled.
Data	Parliamentary debates on different key bills in Portugal and Spain, covering the period from 2008 to 2013. Spain (N= 64) Portugal (N=70)	Parliamentary plenary sessions covering the period from 1975 to 2017 in Portugal and from 1977 to 2017 in Spain. Portugal (N= 4394) Spain (N= 2767)	Parliamentary debates on State Budget bills and media reports in Portugal from June 2011 until May 2014. Media (N= 54) Debates (N= 13)	Parliamentary debates on the stability programme and the annual state budget in three European countries: France, Spain and Finland in 2013. France (N= 10) Spain (N= 8) Finland (N= 4)
Analysis and methods	Content analysis, frequency of occurrence and discourse analysis.	Content analysis, frequency of occurrence and discourse analysis.	Discourse analysis, conversation analysis, research on institutional interaction and frequency of occurrence.	Discourse analysis and Membership categorization.
Findings	The analysis reveals that actors in these two countries resort to different reference groups to identify or distance the nation in this concrete period even if they present similar challenges. Portuguese politicians typically refer to southern European crisis countries whereas Spanish politicians allude to affluent northern European countries. These different patterns may imply that citizens in these countries place their own country on the map of nations differently, but does not mean that Spanish parliamentarians refuse to admit that Spain is in crisis; they just build their argument differently.	The increased popularity of the term 'austerity' occurs practically simultaneously in the Portuguese and Spanish parliaments, suggesting that employing the term 'austerity' to discuss government policies became a global fashion after the fiscal crisis of 2008. From a discursive perspective, there was also a shift in how 'austerity' as a term was used after 2008: from a more functionalist discourse to a more ideological discourse. The increased popularity of the term can be explained by its new framings, which made it usable in the new context: the term changed from being used mainly in fiscal policy to also being commonly used in other policy areas.	The coercion was handled differently depending on the communicative environment by adopting different discursive strategies: depoliticization and relativization. The discourse of depoliticization was very prominent in the public arena, whereas the argumentation in the parliamentary debates underlined the aspect of agency and capability by relativizing the power of the Troika.	The complexity of legitimation work as EU Member States needs to balance between different normative frameworks: European and national. Each country positions itself differently in relation to the EU, which also affects the justification strategy and the whole legitimation process. There is an awareness of the structural hierarchy with the EC but there is also a mutual tacit maintenance of both political organizations (national and EU).

5 DATA AND METHODS

To examine how global crisis discourses were evoked and utilized in national politics, this dissertation used naturally occurring textual materials as data – that is, the data were not produced for the purposes of the research as such (see Potter, 2002). They consist of parliamentary texts from four countries (Finland, France, Spain and Portugal) and media texts from two countries (Spain and Portugal) covering the time span of the heart of the economic crisis: from 2008 to 2013. All the materials gathered for this study are public and easily accessible through the parliamentary online data archives and the newspapers' online archives.

The majority of the data analysed comprises parliamentary debates. Although there are many different types of parliaments or representative assemblies, at local or municipal level, regional level, national level or supranational level, this study concentrates on the national level. Yet there are different subgenres of parliamentary texts such as ministerial statements, interpellations, parliamentary speeches, questions etc. (see Ilie, 2015). This study analysed parliamentary debates during plenary sessions in a broad sense, without any special emphasis on questions, speeches or interpellations. According to Bayley (2004), parliaments are institutions designed to talk and debate. It is in the parliaments that governments expound their policies with their reasons, and where oppositions explain their arguments for or against policies. Therefore, parliaments have a crucial role in the policy-making process; they include discursive, rhetorical and interactive activities and are considered to be dynamic political institutions with open confrontational dialogue among Members of the Parliament (MPs) (Ilie, 2015). Parliamentary debates constitute relevant research data for the purposes of this study as they are a forum where politicians defend their views and arguments. Politicians attempt to enlist the support of the majority of MPs regarding the situation and the problems that they are facing, in this case, the economic crisis, and the reasonable way to proceed with them (Alasuutari, 2016). In this process of deliberation, there are constant intertextual and contextual discourses, in which MPs respond and take into account what has been said previously, not just in the parliament but elsewhere (Bayley, 2004). In that sense, parliamentary debates are optimal materials to investigate how global discourses are utilized in this persuasive work, not only in terms of frequency but also in terms of manners. Parliamentary debates were used in the research at hand to understand the ways in which new measures and political reforms were debated in national contexts and whether and how global discourses were involved in these.

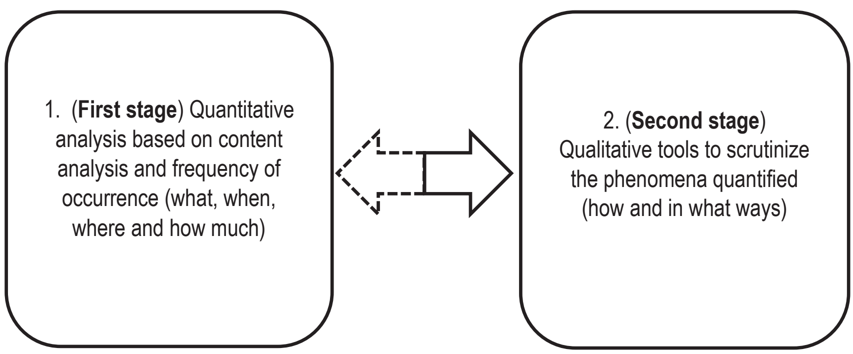
Although the majority of the data consist of parliamentary debates, this dissertation also used media data, more precisely newspaper articles and reports of politicians' speeches in the media. The media is interesting material for this study for two main reasons. First, it serves as an arena where important issues are raised and actively discussed (Alasuutari et al., 2013; Rautalin, 2013). One role of the media is to domesticate news items and make them significant for the audience (Clausen, 2004; Nossek, 2004), and to circulate notions that are prevalent within the population (Alasuutari, 2013). In this research, media texts were employed in two ways. As a first step to determine important measures and reforms implemented during the period of crisis to select the debates wherein those measures were debated. Second, as it is the case with parliamentary debates, media also serves as a communicative and a discursive arena where politicians present and justify measures and policies, in this case not to their peers, but to citizens and the general public. Therefore, political speeches in the media serve as a public channel of communication, allowing citizens to evaluate and control decision-making (Habermas, 1996). In this research the media was also used as an arena against which to compare parliaments as another arena in which new policies and measures are also explained and exposed.

The methodological approach in this dissertation differs considerably from the approaches taken in studies focusing on global diffusion of models and ideas from the perspective of world society theory. The majority of research in that tradition has applied a cross-national comparative method to explain and give causal reasons for the global proliferation of policies, models, ideas and discourses – that is, what diffuse, under what circumstances and from where (cf. Soule, 2004; Jenson, 2010; White, 2011; Della Porta and Mattoni, 2014b; Dellepiane-Avellaneda, 2015). To analyse how these are integrated and materialized into local realities, this study goes deeper into examining how and what has taken place nationally. Therefore, a feature common to all four case studies in this dissertation is a methodological orientation employing both quantitative and qualitative methods. Although the mixed methods approach is characterized by an integration and an analysis of qualitative and quantitative data in a single study (Hanson et al., 2005), this dissertation has not approached both sides equally. The approach to it has been primarily qualitative – that is, greater importance is attached here to qualitative methods, and thus, quantitative methods played a secondary role (see also Howe, 2004; Hesse-Biber, 2010). Apart from mainly describing how and what has taken place nationally, this dissertation also tries to give reasons and explanations for some of the phenomena observed. Although developing causal explanations with qualitative methods is still contested by both quantitative and qualitative researchers (see e.g. Light et al., 2009; Shavelson and Towne, 2002), in this dissertation I followed Maxwell's line of thought (2004b). He claims that causal explanations are a legitimate and important goal for qualitative research (see Maxwell, 2004a, 2008, 2012). Causality refers to the actual causal mechanisms and processes involved in particular events and situations (Maxwell, 2004a). Qualitative research aims at understanding local, contextualized causality that can only develop general models on the basis of valid site-specific explanations (Miles and Huberman, 1984). Therefore, qualitative researchers are able to identify the causal processes occurring in the settings studied and to distinguish valid explanations for outcomes (Maxwell, 2004b).

In the first stage of the process (see Figure 1), content analysis and frequency of occurrence were investigates to ascertain whether and how often certain elements of the global crisis discourses appeared in national policymaking. In that sense, content analysis and frequency of occurrence were used to examine different key themes or topics for further examination (see Hsieh and Shannon, 2005; Franzosi, 2008). This was followed by a codification and quantification of the themes studied in the empirical cases. The main idea was to research preliminary outcomes to then generate novel and well-reasoned interpretations of these through qualitative investigations.

Therefore, in the second stage (see Figure 1), this dissertation applied various qualitative methods to reach a more developed explanation for the phenomena. The discourse analysis approach guided the qualitative analysis of the empirical data of the articles of which this dissertation is composed (see e.g. Wood and Kroger, 2000; Fairclough, 2003). Although discourse analysis is broad and varies considerably in terms of assumptions and research goals (Paul, 2009), it is a method that focuses on the language-in-use, which goes from a linguistic perspective on the study of the structure of the language to the content or the messages conveyed by the language being used (Gee, 2011). The analyses presented in the articles used discourse analysis to examine how political actors give meaning to different affairs through talk and text. Therefore, discourses are a way of expressing and representing aspects of the world (Fairclough, 2003). In that sense, the dissertation followed Hajer's (1995: 44) idea of discourse, 'as a specific ensemble of ideas, concepts, and categorizations that are produced, reproduced, and transformed in a particular set of practices and through which meaning is given to physical and social realities'. Discourse analysis was not only conceived of from the viewpoint of giving meanings and descriptions, but rather how these can gain acceptance and provide ways to justify arguments. All the articles examined the arguments and premises put forward when justifying policies, focusing on different aspects of the discursive practice: on references to the other countries, invocations to global catchwords and rhetorical and argumentative justifications to international obligations and country-specific recommendations (CSRs). In all of these politicians invoked global discourses to promote their views and policies and tried to materialize them in a certain action and decision on national policy-making. To achieve their political aims, national actors need to construct arguments and discourses that are credible, appealing and persuasive to the audience to obtain support. Therefore, in this dissertation I pay particular attention to the persuasive and rhetorical elements of the discourses (Potter, 1996; Nikander, 2008) expounding the manners in which the discourses are constructed in order to be convincing (Billing, 1996). In terms of practicalities, the analysis of the data was done by a careful reading of the text material, identifying discursive patterns related to the research questions of each article. The idea was to present empirical evidence of the discourses by organizing the data into different categories that were inductively identified and coded. On the whole, the articles that compose this dissertation followed the above-mentioned two stages, first quantitative and then qualitative, but the process was often divided into different steps and in some cases proceeding back and forth in the analytical framework.

Figure 1. Analytical framework



The empirical studies and the subsequent arguments can also be characterized as representing a comparative approach. Earlier research has argued that it is difficult to think of any analysis in social sciences that is not comparative (Smelser, 2003). In a similar vein, Durkheim (1938: 139) has claimed that 'comparative sociology is not a particular branch of sociology; it is sociology itself, in so far as it ceases to be purely descriptive and aspires to account for facts'. Although comparative studies of different countries tend to pay attention to the national differences, thus representing 'methodological nationalism' (Chernilo, 2006), the national similarities in the trajectories and hence, the global isomorphism, are evident and much more astonishing. Even though in this dissertation I do not deny the relevance of the local setting as an important cultural frame to make sense of the world, I do not use the local framework here to explain and demonstrate the uniqueness of the nation or national contexts. Rather, the approach was to analyse how, indeed, from a global perspective the measures and policies that may be formulated as national, as well as the arguments to justify them, become similar from country to country as they come to be seen as being part of global discourses.

The data and the methodological orientation described above provided underpinnings for the empirical work presented in all the four articles in this dissertation. However, each study includes different data and methodological process depending on the rationale of the sub-study in question[4] . Article I compares Portugal and Spain using floor debates on key bills and reforms from 2008 to 2013. There parliamentary debates were the empirical data, although media data were used to identify the key reforms and bills. The study proceeded in two steps: first an identification and quantification of the references to other countries appearing in political argumentations in the parliaments, second a qualitative analysis to identify how and what were the main ways and purposes of referring to other countries in parliamentary talk. Article II also compares Portugal and Spain by using all the parliamentary debates from the 1970s (at the end of both dictatorships) until the present day. In this case, the study proceeded in three steps: first by providing the frequency of occurrence of the term 'austerity', second by coding the mentions of the term according to policy areas, third by analysing the ways in which 'austerity' was invoked. Article III uses direct reports of speeches of politicians in the media as empirical data to compare them with parliamentary debates taking the case of the intervention by the Troika in Portugal (June 2011- May 2014). The analytical procedure was also conducted in three steps: the first stage was characterized by an identification of the different arguments and justifications put forward during the international intervention, in the second stage various terms and phrases associated with the different modes of justifications were identified, in the third stage, the

[4] All the details on the rationale and justifications of the data and methods specific in each study are presented in the original articles.

frequency of occurrence of terms and phrases and their interrelation within the communicative area (parliament or media) was evaluated. Finally, Article IV uses as its data the EU reports during the European Semester (guidance on EU priorities, country reports and CSRs) and the national parliamentary debates in which the guidelines of the European Semester were considered and implemented in 2013 in three European countries: Finland, France and Spain. The study also proceeded in three steps: first by analysing the reports and recommendations to identify the different themes and issues recommended to each state, second by conducting a key-word search of the themes and references to the EU institutions in the parliamentary debates, and third by means of a qualitative analysis of the ways in which references to the EU and the recommendations were invoked.

In light of numerous comparative studies based entirely on quantitative analysis to demonstrate how global discourses diffuse, one might ask how the results drawing mainly on two countries can be generalizable to explain the discursive strategies and patterns used in national contexts. In qualitative research the objects of analysis have to be observed as case examples, which may not imply that the dynamics and discursive strategies found always exist, but rather that they are possible in other contexts (Alasuutari, 2013). Overall, the concrete analytical framework presented in each article contributes to identifying the discursive patterns by which global ideas, reference groups and international guidelines and obligations are constructed, mentioned and discursively articulated within domestic political field battles.

6 RESULTS

In my study as a whole I set out to examine the role of global crisis discourses in domestic politics. I approached the question from a bottom-up perspective by studying how national actors evoked and utilized these discourses when dealing with the economic crisis nationally. Drawing on the analysis and the results of the four articles, I present three main results in the following subsections.

6.1 National positioning within the crisis

From this dissertation one can observe that global discourses were used to guide national policies. This was especially evident in the use of various international comparisons and decisions taken in other countries, which were evoked in national policy-making as models to follow or avoid as well as to define appropriate policy goals. References to other countries were used to exemplify the arguments and justifications of national politicians. The global crisis framework was an appropriate discursive and rhetorical tool to use in political deliberations and talk in order to illustrate what the current national situation was and determine what should be done.

We can observe different patterns or strategies of making reference to other countries that served different discursive purposes. The first one was to describe and explain the world situation in general terms. In this case politicians invoked other countries to expose general matters without stressing the national situation. The second one was to allude to other countries to know, understand and render it plausible to other politicians the national situation. In this case, national politicians presented comparisons between the nation and the rest by providing rankings or only explicit invocations. Those comparisons could be drawn to highlight a positive, negative or similar position of the country in comparison with the others. The third was to refer to other countries to define political goals: what the nation needed or did not need.

Among the vast array of possible references, to which ones did politician resort? This dissertation shows that there were certain countries that figured recurrently in the talks, which have been defined as reference groups. Article IV suggests that the

EU and its Member States constituted the main reference group. Apart from illustrating how the others were reacting and performing in this crisis – that is, to point out who was lagging behind or who was leading and to present ideas for improvements and progress, these were also used to demonstrate and maintain a certain position and role within the community, in this case the EU. For instance, Article IV demonstrates the French tended to portray France as a model for others, in this case national actors were working to retain France's central role and high status within the EU. In the case of Finland, actors positioned the country in a much more modest role and tried to preserve credibility in the eyes of the EU. As Article IV illustrates, the case of Spain was different in that Spanish actors emphasized the laggard situations and national actors stressed the importance of maintaining economic support from the EU to overcome the crisis.

Article I also shows how the EU countries constituted the bulk of references used in political discourses. However, certain countries were invoked more frequently. Although Portugal and Spain as countries have much in common, national actors tended to follow different referencing patterns in explaining their views. Article I demonstrates how Spanish politicians tended to make more frequent use of references to well-off countries such as Germany, France or the USA, whereas Portuguese policy-makers preferred to refer to countries more severely affected by the crisis. The fact that policymakers in Spain used more references to Germany or France is because, despite being a southern European crisis country, regarding the economy and population it is a big country, one of the big five in Europe. Indeed, we need to consider that before the economic crisis, Spain was experiencing a growth far above that of the EU. Therefore, Spanish parliamentarians resorted more often to European countries that they considered similar, within the same category. Likewise, Portuguese parliamentarians referred more often to countries that they considered part of the same league, such as the southern or crisis countries, because these make more sense to the national audience. In that sense, as a crisis country in need of a bailout, Portugal was compared often to countries such as Greece or Ireland that also experienced a bailout. These results do not suggest that Spanish actors did not consider Spain as being in crisis; they merely constructed their arguments differently and by using different reference groups.

It can therefore be argued that the use of certain references to illustrate and justify political points of view depended on how a country positioned itself in the crisis – that is, how national actors perceived the country in question. This also evidenced how a country positioned itself within the European community. Although national actors used references and models from other countries, they did not follow and invoke the same examples, but rather those that resonated with the national position and trajectory. This 'national' reference group is the one that makes more sense and is more readily acceptable for the national audience to compare and identify with, which is why certain countries were evoked as important rhetorical tools to render more comprehensible the position of the nation and to define what political aims were to be achieved. After all, politicians needed to invoke evidence that served to prove their point. This dissertation also makes it evident that by constructing and resorting to a reference group, or acting within a frame of reference, national actors monitored the situation and measures adopted in their reference groups. Therefore, nation-states end up synchronizing their trajectories with those of the reference groups. References to other countries were objects of comparison that not only help understand the national situation within the crisis, but were also legitimate and assert elements to resort to in political rhetoric.

6.2 Enactment of catchwords

Global discourses are also constituted by catchwords, which gain popularity and spread. Within the crisis 'austerity' was a widespread concept. Though by no means a new term, austerity gripped the political setting. As some authors have suggested, austerity was promoted globally as a remedy and adopted nationally as a 'magic solution' (see Clarke and Newman, 2012; Dellepiane-Avellaneda, 2015). As has been the case with austerity, some policy ideas may diffuse globally through the actions and discourses of think-tanks, politicians, academics and international organizations (Chwieroth, 2007; Béland, 2009).

What did the spread of austerity trigger in national contexts? Ideational theory has argued that new ideas impact the local context when there is a need or a change in a precise moment as a way to respond to a new political situation (Kingdon, 2003). According to Blyth (2013) a change in ideas used can be explained by the local necessity for a rational information updating, learning and error correction. Therefore, it has been argued that national actors were seeking new global discourses and interpretations to explain the particular circumstances in which they found themselves (Chwieroth, 2010). In new national political situations, actors resort to new and alternative ideas and discourses in which the existing ones do not work (Béland, 2009; Carstensen, 2011a). From this perspective, one can hypothesise that the intervention by the Troika in Portugal from June 2011 to May 2014 could be considered as a crucial and suitable national situation for adopting and invoking ‘austerity’ nationally, whereas Spanish actors would probably resort to it less since the national situation was not that critical.

However, Article II shows that although the national situations differed, actors in Portugal and Spain resorted to ‘austerity’ more or less simultaneously and with similar frequency. Even more interesting is the fact that these countries had dissimilar patterns of frequency before 2008, but that year was the turning point with an exponential increase in the use of the word austerity. The term ‘austerity’ also acquired new meanings. Before 2008, austerity was evoked as referring to a concrete plan of action to return to a certain economic stability and the discussion dealt with how it should be implemented. However, after 2008 the term ‘austerity’ acquired a new meaning, being understood as a way to act and frame political programmes, therefore, something that goes beyond its economic connotations. This increase in popularity and the shift in how ‘austerity’ as a term was used after 2008 also meant that ‘austerity’ spread from fiscal policy to frame and explain other issue areas. For instance, in 1986 in Portugal, 80 per cent of the mentions of the term ‘austerity’ in parliamentary debates were in the fiscal policy area. Similarly, in 2002 in Spain, 92 per cent of the mentions were likewise in the fiscal policy area. However, in 2008 in the Portuguese parliament only 14 per cent of the references to ‘austerity’ concerned fiscal policy, whereas 29 per cent referred to education. Likewise, in 2011 in Spain 30 per cent of the references to ‘austerity’ were in social policy, and only 23 per cent were in fiscal policy. Even though nation-states ended up introducing quite different policy reforms, ‘austerity’ became a term to justify and argue for all types of discourses and policies.

Drawing on the findings of the case study in this dissertation, it can be claimed that it was not the prevailing situation in a country that explains why national actors started talking about using ‘austerity’ more. Instead, when ‘austerity’ became a globally fashionable term by means of which to conceive of, manage and argue about the 2008 financial crisis, national actors in different nation-states started to follow the trend, arguing and formulating new national policies and reforms under the rubric of ‘austerity’.

6.3 Taming and legitimizing international discourses

The preceding sections have shown that in national contexts actors were reading the same signs of a global ‘spirit of the time’ (Alasuutari, 2016) being receptive to and enacting the trends of the moment. But the crisis also caused important changes in national governance, which entailed something more than following global discourses. This was the case of international bailouts (the Troika) and new international policy tools (European Semester). This dissertation has also paid attention to how forms of coercion and international guidelines were managed nationally.

Earlier research has claimed that the intervention by the Troika challenged the legitimacy of the democratic procedure in the nation-states bailed out (see e.g. Armingeon and Baccaro, 2012; Culpepper, 2014; Sacchi, 2015), which were reduced to 'democracies without a choice' (Streeck, 2014). The case of the Troika is without doubt an example of coercive power, where the ECB, the EC and the IMF established strict and binding requirements with the audited country for providing financial support. In that sense, it has been claimed that coercion activates the tendency to resort to justifications based on the depoliticization of national politics. In other words, it has been argued that coercive measures lead to a denial of the political character of decision-making, or to an absence of choice and agency (Watson and Hay, 2003; Standring, 2018).

However, Article III demonstrates that depoliticization was not the only justification within an international intervention. Indeed, national actors domesticated the imposed discourses to justify the measures strategically, depending on the communicative environment. As Article III shows, actors tended to use depoliticized justifications when explaining the policies and measures to citizens, whereas they downplayed the Troika and relativized the coercion to show their agency in front of other politicians in the parliament. Both strategies were a means to safeguard the integrity of the nation: they were forced to apply certain measures, but they needed to work for and with the nation and its citizens. However, national actors opted for different strategies to portray rationality and responsibility (see also Alasuutari et al., 2018).

The case of the European Semester was slightly different from the intervention by the Troika. This annually circulating policy co-ordination tool was introduced in the EU in response to the financial crisis in order to control and co-ordinate national economic policies. The policy was launched to prevent discrepancies and to ensure convergence and stability in the EU. In this case, too, the intrusive co-ordination tool with external guidelines posed a challenge to nation-states. Article IV shows that national actors managed policy co-ordination and CSRs by balancing between two normative frameworks: the EU and what membership entailed on the one hand, and the nation-state and work for and with sovereignty on the other. In this case, national actors also invoked all the themes and issues from the recommendations and guidelines in parliamentary discussions, but they were creative enough in the discourses by framing the recommendations as national suggestions and as part of the national interest and functionality. Both cases, the Troika and the European Semester, demonstrate that national actors had to cope with different spheres of responsibility and accountability in the crisis: they needed to apply certain international conditions and proposals and, at the same time, work for and in name of the nation. In order to manage these two settings properly, national actors domesticated the discourses from the international organizations– that is the Memorandum of Understanding (MoU) from the Troika, and the CSRs, and they constructed them discursively to conform the international discourse and work for and defend national sovereignty and their agency.

Drawing on the findings of the empirical cases, it can be argued that, although the international organizations during coercive practices imposed tough adjustment programmes that, in a way, subordinated nation-states to their political requirements, the influence exerted by international organizations in the national context was mediated through the domestic field battle. Therefore, it can be argued that this influence was domesticated nationally and utilized strategically at the level of discourses. To construct proper arguments and give valid accounts of introducing new economic measures and policies, national politicians needed to consider what was deemed legitimate and the ways to legitimize the international measures at the level of local practices and discourses (see also Schmidt, 2016).

7 DISCUSSION

In this dissertation I intended to analyse the role of global crisis discourses in domestic politics. I approached the question from a bottom-up perspective, in which I studied how the global set of discourses constituted and spread during the economic crisis were evoked and utilized in national politics when dealing with the economic crisis nationally. To do that I examined different prominent elements that were part of the global crisis discourse: international guidelines and recommendations, 'austerity' as a global catchword, international comparisons and the mechanisms by which they became part of the national context and what triggered their use in the national political sphere mainly in two countries: Portugal and Spain.

Discussing national policies in a global context and employing similar transnational discourses regardless of the nation-state at hand is not a new event (see also Rautalin et al., 2018). On a general level, it is mostly believed that the 2008 economic crisis spread rapidly to become a global economic crisis. By illustrating how different components of the global crisis discourses were used and invoked in national parliaments and public debates, this dissertation adds empirical evidence on how the concepts and discourses that defined and framed the global economic crisis also diffused worldwide. It therefore propounds how the crisis was constituted and spread as a global set of discourses, which indicates how it was brought to life and actualized in local discursive processes.

In this dissertation, I have drawn three main conclusions from the results presented in the original articles. First, I have argued that what caused national actors to evoke a certain group of countries as examples depended on how a country positioned itself within the crisis. In a way, both countries were experiencing the economic downturn, however, the macrostructural factors, the economic positon of the country before and during the crisis, as well as its related power within the international community and bargaining power in international negotiations conditioned the discursive strategies used. Second, I have claimed that it was not the prevailing situation in a country that explained why national actors started talking about 'austerity' more prominently, but rather when 'austerity' became more frequent throughout the world, it appeared in national discussions. Therefore, the explanation can be found in the global spread of discourses, not in the situation at hand in these countries at different timepoints. Third, the dissertation also challenged the notion of coercion and forceful international co-ordination by showing how, in the presence of international conditions, national actors also displayed their agency by domesticating these conditions and using them within and for national political discourses. Hence, national actors were not only strategic in introducing global ideas – such as catchwords and references to other countries, but also when introducing international measures and guidelines that they had to comply with. Therefore, global discourses were used for three different purposes. First, they were utilized to understand domestic situations within this crisis, to give answers to the problems and to guide national policies. Second, they were employed to legitimize many types of cuts and distasteful reforms, such as austerity policies. Third, they were also used as a way to show that 'we', the nation-state, are not alone or the only one in this critical situation.

This dissertation sheds more light on the theoretical understanding of the mechanisms and rationales by which actors in different nation-states come to enact and utilize global discourses in domestic politics by taking a step further towards the diffusion and transfer approach. Although there are ideas, exogenous models, international recommendations and even requirements that spread worldwide, these discourses are not used in the exactly same way, nor did they trigger the same reactions everywhere. Therefore, this idea of domestic policy-making guided or influences by the global crisis discourses did not imply that nation-states end up implementing the same policies. Rather, those discourses were interpreted and utilized within and for each domestic context – that is, they were internalized and domesticated nationally for national purposes and to follow their national identities and trajectories. This leads to the conclusion that it is more appropriate to talk about a synchronization of national policies across the world, in which nation-states end up following similar trends or moves, but maintaining their distance from one another (see also Alasuutari, 2014a, 2016). In that sense, we can propose that instead of conceptualizing and exploring global discourses as something fixed that spread, where one should try to explain what diffuses and why, it is better to analyse the national reactions, usages and interpretations of these in national contexts. One should focus on the dynamisms of local actors (who) in different situations (where) and the ways by which these global discourses are deployed (how) in national contexts.

This leads to considering the role of national actors within the process of the adoption and enactment of global discourses. Research has portrayed national actors as ‘unthinking’ and without agency, who just follow current fashions (see e.g. Meyer, 2004), thus neglecting their role in incorporating the global discourses in national contexts. This dissertation has shed more light on the role of national actors by suggesting how they did not remain passive concerning the global discourses. Rather, actors used and invoked those discourses when they deemed credible in the national context and when they were found suitable in terms of the interests they tried to promote in national political field. Although national actors have recourse to global discourses as a way to construct an understanding of national politics and legitimize national policy design, national actors choose how, when and for what purpose they use them – that is, local actors make use of global discourses for differing means and purposes. I propose that this is the way by which global discourses become embedded in national contexts and obtain the desired goals. This is extremely important in this context of crisis as the international ideas and solutions were not easy and pleasing to everyone. While Blyth (2002) has claimed that ideas are the objects of ‘great transformations’ in periods of uncertainty, this dissertation proposes how domestic actors played a role in interpreting and communicating these ideas to achieve the desired effect. This makes that the national actors agents in the process of domesticating and aligning the global discourses to the nation, invoking them in a way that minimizes possible criticism and negative reactions, such as emphasizing the national benefit and the common good (Articles III and IV); and evoking them in a manner that supports their arguments (Articles I and II). I therefore suggest that the process of domestication does not precede the utilization of the exogenous ideas, rather it is a continuous process triggered by the constant invocations, interpellations and interpretations of the global discourses from and within the national context.

The 2008 crisis has wrought a change in economic governance, with more international control, mainly at the EU level, even in areas or ways that were not expected or implemented before (the Troika and the European Semester are examples of this). However, this has not been translated into a rejection of or putting blame on the global context, rather the contrary; actors in national policy-making took refuge in it so as not to fall behind and overcome the crisis. Even though global discourses have an important role in national contexts, with this dissertation I have also aimed to contribute to the argument that power and agency do not originate with the global in a hierarchical dictatorial manner, but rather from the local context through the use of epistemic governance. In that sense, local actors are the ones resorting to the global discourses and selecting the discursive strategies deliberately in keeping with their aims and obligations, the type of discourse they invoke and the audience to whom this discourse is addressed. Hence, it could be argued that epistemic governance is relational and strategic – that is, designed and framed taking into account the situation in which the discourse is produced and the audience to whom the discourse is delivered (see Rautajoki, submitted) (Articles III and IV). Therefore, this dissertation has shed more light on the mechanisms by which global discourses are adopted and utilized in different local contexts by claiming the important role of situational criteria for and in each discursive situation (see also Charaudeau, 1995; Maingueneau, 1996; Maingueneau, 2010).

I concede that this dissertation has some limitations in terms of scope as it has concentrated mainly on studying two countries at the EU level. However, I would expect to find similar trends and ideas on how global crisis discourses were invoked and utilized in other cases. Moreover, this dissertation has left unopened some black boxes, which suggest future avenues of research. First, this dissertation has shown how national actors evoked references to other countries and constructed a reference group (Article I). In this line of research, it would be interesting to systematically analyse the countries evoked to emphasise and show bad models and situations, and those that are invoked as models to emulate or to show achievements in different nation-states. This could indicate whether and how the perceptions and ideas of other countries are more or less shared and used for similar purposes in different nation-states. Second, in this dissertation I have looked at political discourses addressed to other national politicians (parliamentary discourses), and discourses addressed to citizens (statements in the press). In this respect, and following the argument of the strategic and relational discourse, it would be important to analyse how national actors in political talk address actors and elites from international organizations, such as actors from the EU or the Troika, in which in many cases local actors needed to give accounts. Third, although with this thesis I have shown that during the economic crisis, national politicians did indeed look at and use global discourses for their arguments. It would be interesting to study whether, when there are more problems or controversial situations, such as in a crisis, national politicians tend to invoke global discourses and solutions from abroad more often than in periods of more normality. Fourth, in this dissertation I have explained how national actors enacted global ideas and catchwords by studying the term 'austerity'. However, this dissertation has not investigated the reasons why certain ideas and practices have been highly successful while others have failed to become or remain dominant globally. Therefore, it would be interesting for future research to analyse the potential reasons for the failure and success of global discourses and policy ideas, i.e. whether it is due to the nature of the successful ideas and discourses themselves or merely to the fact that they have been driven by powerful interests and promoted by powerful agents.

I could not complete this dissertation without acknowledging that the global economic crisis has triggered and/or intensified other crises: such as migration crises, social crises and political crises, especially in Europe. This has contributed to an increase in populism. For instance, although in both countries studied here extreme right parties have only recently won seats in the national parliaments[5] , it seems that all sorts of populisms are proliferating and gaining ground throughout the EU, especially extreme right populism. Does this increase in populism bring with it a tendency to reject the exogenous and the global, and thus focus on the local or nation at the level of discourses? Would this event change the discursive paradigm? These questions open up new avenues of research, to investigate whether and how national politics is taking distance from the international context, and whether and how there is a change in the discursive and rhetorical strategies employed.

[5] Portugal was until the last elections, 6th October 2019, one of the countries in the EU jointly with Ireland, Luxemburg and Malta without an extreme right party in the parliament. In Spain it was also in the last election, 28th April 2019 that an extreme right party entered the parliament.

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PUBLICATIONS

PUBLICATION
I

Looking at others in national policy-making: the construction of reference groups in Portugal and Spain from 2008 to 2013

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Looking at Others in National Policy-making: The Construction of Reference Groups in Portugal and Spain from 2008 to 2013

Why is it that when debating the economic crisis, actors in the Portuguese parliament invoke more frequently countries affected by the crisis, whereas actors in the Spanish parliament invoke economically well-off countries more often? This article explores this mystery by studying how and why certain countries are evoked in the decision-making process. The analysis reveals that the actors mention different countries to contextualize the nation. We argue the actors in these two countries resort to different reference groups to identify or distance the nation in this concrete period even if they present similar challenges.

Keywords: reference group, epistemic governance, parliamentary debates, economic crisis, Portugal, Spain

Introduction

Even though the nation-states are sovereign entities, existing research shows that the decision-making of national governments is interdependent; that is, 'policy decisions in a given country are systematically conditioned by prior policy choices made in other countries'(Simmons, Dobbin, & Garrett, 2008, p. 7). In practice, this means that when politicians discuss new policies in national parliaments, one of the ways to justify their ideas is to refer to decisions or policies adopted in other countries (Alasuutari, 2016). There have also been studies analysing how this actually takes place. For instance, it has been claimed that there are cross-national differences in the frequency with which actors in national political debates appeal to other countries (Alasuutari & Vähä-Savo, submitted; Tiaynen-Qadir, Qadir, & Alasuutari, 2018). However, less attention has been paid to the countries that speakers invoke. From this viewpoint, it is interesting to study how commonly different countries are mentioned and why.

In this paper, we study and compare the references to other countries that the actors in the Portuguese and the Spanish parliaments resort to when debating policies from 2008 until 2013. Although one could expect similar referencing patterns of these two neighbouring countries which have both struggled with an economic crisis in recent years, our analysis indicates that, on average, politicians refer to different countries when justifying their views. That is, in Portugal politicians typically refer to Southern European crisis countries, whereas in Spain speakers allude to Northern European well-off countries. Therefore, our research aims to make understandable this difference by analysing how references to other countries are used in national policy-making in the aftermath of the recent economic crisis.

The paper is organized as follows. After discussing the theoretical framework of this article, we introduce the data and the methods used in analysing it. Then, we present our results divided into two sections: a descriptive analysis of the references made to other countries, and a qualitative analysis of the discourses employed in those references. Finally, we discuss our findings linking them to the larger theoretical framework and suggesting possibilities for future research.

Identification as a process of synchronization

With our analysis of the ways in which Members of Parliament (MPs) allude to other nation-states when constructing their arguments in parliamentary discussions, we aim to contribute to the wider theoretical discussion on how and in what ways policies and ideas from other countries shape national policy-making. In order to do that, we use the concept of reference group in analysing to what countries the MPs refer and how such references are used to compare and propose policies and ideas. We argue that this practice contributes to a synchronisation of national policies and trajectories.

By talking about policy synchronisation, we claim that national governments react to global events and to the reactions of other governments, hence contributing to the creation of global policy fashions and ideas (Alasuutari, 2014a, 2016). From this viewpoint, the main question is not whether national-states' policies converge or diverge (e.g., Bennett, 1991; Jordan, 2005; Knill, 2005). Rather, the emphasis is on the process, in other words, 'how states pay attention to each other's moves and how that affects their policymaking'(Alasuutari, 2016, p. 13).

Previous scholarship shows that alluding to the international community, for instance to the policies adopted in other countries, is common in debating policies in national parliaments, because it is an effective way to try and convince others of sensible and efficient policies(Alasuutari, 2016; Tiaynen-Qadir et al., 2018). In such persuasion work, politicians are careful in choosing the countries and regions to which they refer. Bermeo (1992) concludes that comparability –that is, the geographic proximity, cultural similarity and shared history—influences the direction in which political actors may look at. It has also been proposed that prestige has a role, as models and ideas from countries with high status can influence the considerations of political actors (Weyland, 2004). Therefore, actors in national policy-making do not resort to the international community randomly. Rather, they allude to certain countries that they consider proper examples for their justifications in the national context. As Omelicheva (2009) points out, the state's behaviour in policy-making is influenced by the reference group.

The idea of reference group was originally coined in social psychology; where Hebert Hyman (1942) defined it as the group in which an individual evaluates his or her own situation or conduct.

However, this approach has been tackled also in political sociology and international relations literature, where it has been pointed out that the state leaders and political actors invoke external models to make and propose policies (e.g., Alasuutari, 2014b; Omelicheva, 2009; Rivera, 2004; Tervonen-Gonçalves, 2012). Political actors compare the national context with that of other nation-states to prove that ideas, policies and practices enacted in those countries are legitimate and appropriate sources of information to consider. Thus, it can be assumed that states also have reference groups (Omelicheva, 2009).

The idea of the existence of a reference group implies that the self is shaped and constituted within a group. As identity only exists in a relational context among entities, it needs differences in order to be defined (Connolly, 2002; Neumann, 1999; Tekin, 2010). The image and reality that we get from the others serve as a source of knowledge for the identification of the self (Todorov, 1992). Identity is also plausible when we think of organisations. Comparisons among organizations frame and form the identification process, whereby the self-identification as an organization is directly influenced by the others (Sevón, 1996). The imitation process or learning from others plays a role in the identity construction of the institutions and organizations (Czarniawska & Sevón, 1996). Indeed, before learning or imitating, institutions need to identify themselves in relation to others. Secondly, they need to identify and construct desires (What would we like to be?). Thirdly, they require an identification of reality (What kind of situation is this like?), and finally, they need to identify the action or route to take (What is appropriate for us in this situation?) (Sevón, 1996). Furthermore, when framing problems and promoting changes, organizations compare the local situations with the ones of the others (Sahlin-Andersson, 1996; Tervonen-Gonçalves, 2012). The actors involved in the organizations tend to compare them with others considered analogous when defining the situations, positions and suggestions (Sahlin-Andersson, 1996; Sevón, 1996). Considering nation-states, national policies are also formed and constructed by comparing and identifying the domestic situation with that of other countries (Tervonen-Gonçalves, 2012). Hence, mentioning 'Others' actors proceed to conceptualize, understand and define the 'Self' (Sevón, 1996).

The idea of identifying the country's position by using comparisons or mentions of other countries is part of epistemic governance , as actors use references to other countries as means to persuade and convince the audience about the particular idea that they promote (Alasuutari & Qadir, 2014). For instance, an MP can use a comparison to emphasise a bad shape of the nation to demonstrate that some actions are needed. This comparison works as a warning for the audience to suggest a change and make it as evident as possible. Another MP can make use of other countries to portray a different picture, for example to demonstrate that the country is taking the correct direction and that no changes should be made in this respect. Yet, suggesting that the nation has taken the same path as some others can have two goals. On the one hand, it could be done to justify the correct trajectory that the country has taken because some others are doing the same, but on the other hand it could be a means to emphasize that the situation is not proper in none of those countries.

Data and Methods

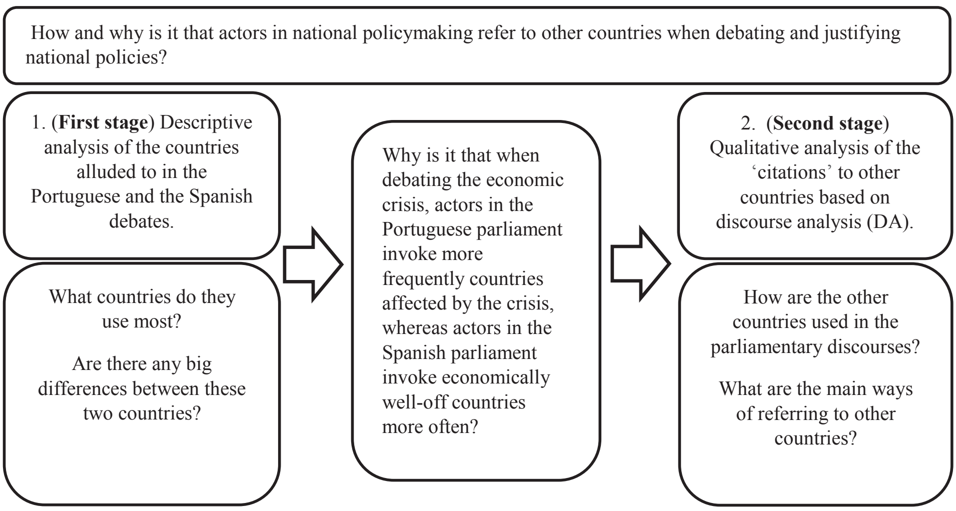
The empirical data used in this study comprise floor debates in different key bills during the recent difficult economic situation in Portugal and Spain, covering the time span from 2008 up to the year 2013. The reason for choosing these two countries is that they constitute a good example of nation-states who suffer from the economic downturn (e.g., Andrade & Duarte, 2011; Royo, 2013). This period has been selected as a case to study because it represents hard times in the political sphere, especially in Southern Europe, where there have been many political problems to be discussed and solved (e.g., Bosco & Verney, 2012). It has been suggested that when searching for policy solutions to new and challenging problems, governments are likely to look for solutions from abroad (Dolowitz & Marsh, 2000). Yet, following Hay (1999), we understand the crisis as a process of decisive interventions and transformations where the state is reconstituted, and thus, a moment where the identification process is reinforced. This makes the period studied here an interesting case to study the ways the references to other countries reflect national self-identification.

These two countries represent a good pair for comparison because of their geographical, historical and cultural ties as well as their similar social traits (e.g., Queirós, 2009; Sardica, 2014), being part of the same family of nations (Castles, 1993; Obinger & Wagschal, 2001). On the other hand, they differ from each other; for example, Spain has much more population, about four times the population of Portugal (Blanchard & Jimeno, 1995). In addition, Spain is richer than Portugal in terms of GDP per capita (e.g., World Bank database[1]).

From the aforementioned debates during this period, we have selected the floor debates from all the key bills that were a direct consequence of the economic situation such as plans of austerity, cutbacks, etc., in addition to all the annual state budget bills. The procedure of identifying the key reforms and bills was done by looking at the archives of the principal newspapers from both countries[2] and studying the chronology of crises published by *Observatório Sobre Crises e Alternativas*, University of Coimbra[3]. These sources of information were used neither to analyse the content nor the way in which the events were reported. Rather, they were used as a first step to identify different measures, reforms and plans done during that period in order to select the floor debate where the discussions of the reforms took place. As a result, a total of 134 parliamentary debates, 64 from Spain and 70 from Portugal were selected for analysis.

Parliamentary debates form an interesting research material for the purpose of this study, as parliaments are forums where politicians justify their views by responding not only to what has been said previously in the parliament but also elsewhere. Thus, they constitute a good point of connection between global ideas and national interest.

Figure 1. Analytical framework



Data analysis consisted of two stages (see Figure 1). In the **first stage**, we coded and quantified the appearance of all nation-states in any of the 134 debates. This allowed us to identify the countries frequently used in both cases and to recognize the parts of the debates where the other countries are evoked. In the **second stage**, we analysed the parts where there are references to other countries. In this stage, we applied a set of analytical tools called discourse analysis (DA) (e.g., Fairclough, 2003; Howarth & Torfing, 2004; Wood & Kroger, 2000). Following Howarth and Torfing (2004, p. 300) discourse is understood here as an 'ensemble of ideas and concepts through which meaning is given to social and physical phenomena'.

In practice, what we analysed in the parliamentary debates were the elements of the discourses—ideas, concepts and categories—wherein the references to other countries are evoked. (e.g., Tervonen-Gonçalves, 2013). In the data analysis, the interest was in identifying different modes of evoking other countries. By 'modes' we mean different discourses wherein speakers allude to other countries. In that sense, we did not have any pre-established categories to test in the data; rather we identified them inductively. The aim was to create a categorisation that includes all cases – that is, all mentions of other countries can be fitted into it (Alasuutari, Bickman, & Brannen, 2008).

With this data as a material and the purpose of this study, our classification is reasonable and practical, as it does not lose the richness and variety of the references. Yet it allows us to categorise properly different ways of using other countries in the parliamentary debates. In addition, it must be noted that the types of references to other countries identified are not mutually exclusive, as a single quote may include several modes as well as several countries associated.

The frequencies and discourses of referencing other countries

Our data show that in both of these two countries, European countries and the USA – that is, Western countries, are mentioned more often than others. However, there are important differences in the countries that parliamentarians reference more frequently. On the one hand, politicians in the Portuguese parliament refer more often to Spain, Greece and Ireland–that is, to countries more affected by the economic crisis. In contrast, parliamentarians in the Spanish parliament mention more frequently big and economically well-off countries such as Germany, France, and the USA, followed by Italy and the UK (see Table 1 and 2).

Table 1 and 2. List of the top 5 countries mentioned in the parliamentary debates of Portugal and Spain[4]

Top 5 countries in the Portuguese Parliament		
Countries	**Debates (N=70)**	
	N	***%***
Spain	36	51.4
Greece	35	50.0
Ireland	25	35.7
Germany	23	32.9
France	22	31.4

Top 5 countries in the Spanish Parliament		
Countries	**Debates (N=64)**	
	N	***%***
Germany	39	60.9
France	31	48.4
United States	28	43.8
Italy	27	42.2
United Kingdom	20	31.3

In order to make sense of these patterns, we need to analyse how and why the actors make use of references to other countries in parliamentary debates. Are there, for instance, differences in the ways in which other countries are alluded to in Spanish and Portuguese parliaments that would explain the different referencing patterns?

A careful analysis of all the data suggests that we can distinguish three ways of alluding to other countries in the parliamentary debates. One is simply that parliamentarians take the example of one or several other countries to contrast or compare their policies to those of their own country. By listing several countries, parliamentarians are engaged in constructing a *reference group* or utilizing a shared view of a group, even if they do not name the group. These implicit or named groups of countries can then be used for identification in two ways. One is to *differentiate or distance* the parliamentarian's own country from others. Alternatively, parliamentarians can *identify* their country with a reference group. In that sense, parliamentarians refer to other countries in their political talks to locate their country on a map which they assume their audience to share.

Constructing a reference group

Parliamentarians may mention a single country as an example to support their argument. As shown in the quote below from the Spanish parliament, Germany is mentioned as an example to show what Spain should do or at least consider.

> The truth would be that the Spanish Government, despite what they have told us, almost does not do cutbacks; almost does not touch the areas that are more dispensable and sumptuary: the Monarchy, the Senate, some redundant ministries and especially the Army. It seems that the times do not pass and that tanks and submachine guns can't be touched either. In Germany, when the crisis started, they cut 40 % of the military spending, and it is not, of course, our case (Parliament of Spain, 11 January 2012, p. 19*)* [5].

In many cases a reference group is constructed by listing more than one country in the same statement. In such examples, parliamentarians cluster different countries under the same reference group due to their similar characteristics regarding the issue in question. The case below from the Portuguese parliament shows how this works. In this particular case, the MP invokes Germany, Italy, the Netherlands, Greece, Finland and the UK as a group of countries in which governments are increasing the age of retirement to prove that Portuguese government is not the only one doing these types of unpopular reforms. Indeed, by presenting more than one example the parliamentarian shows how common the type of reforms are that he proposes.

> I would like to remind you that Germany is making changes like these, that France is making changes like these, Italy is making changes like these, the Netherlands is making changes like

> these, like Greece, Finland and the UK. In many European countries, the average retirement age is indeed increasing, and this is now necessary to protect the system (Parliament of Portugal, 29 November 2013, p. 15).

In some cases the parliamentarians give an attribute to the countries in question. In the example above, in addition to listing countries in which the retirement age has been raised, the attribute is simply 'European countries', but the name given to the reference group can also be more specific. If the attribute can also be applied to one's own country, mentioning it implies that 'we' should consider following on the same path. The case below from the Spanish data shows how an MP compares the situations of Germany, France, Italy and Spain by indicating that they are grouped together as the larger Eurozone countries and that indeed they should follow similar paths.

> This is what we have understood, for large Eurozone countries. Keep in mind that Germany has already put it in its Constitution and that France and Italy are on the same path as Spain, to put it in the Constitution (Parliament of Spain, 23 August 2011, p. 23).

Another means of clustering countries into reference groups is to resort to statistical comparisons and ranking lists. The MPs mention several countries in the same statement by positioning them in relation to each other: which ones are average, leaders and laggards. Here is one example from the Portuguese parliament, in which the MP wants to emphasize the disastrous situation of the debt in the majority of the EU countries, and to pinpoint that Portugal is not the worst:

> It is interesting to note that Ireland, Greece, Spain, or the United Kingdom and France have much more disequilibrium in the budget between 2008 and 2010 than Portugal. How much is the public debt? In Belgium, it corresponds to 97.2% of the Gross Domestic Product; in Greece 112.6%; in France 76.1%; and, in Italy 114.6%, with 78.2% being the average of the Eurozone. For 2010, it is foreseen that in Belgium, the public debt will correspond to 101.2% of GDP; in Greece 124.9%; in France 82.5%; in Italy 116.7% and in the Eurozone, the average will be the 84% of GDP. The Portuguese position is more favourable than the average of the Eurozone. In 2010, Greece, Belgium and Italy will be worse off than Portugal - in fact, the biggest debt imbalances will exist in the UK, Spain and Greece (Parliament of Portugal, 25 March 2011, p. 29).

Distancing the country from other countries

These different ways of evoking a reference group are used to position the parliamentarian's own country on a map. One strategy is to distance one's country from a group. As in the example below from the Portuguese parliament where a MP is pointing out a difference between Portugal and France, Sweden and Germany, arguing that it is different to become unemployed in Portugal than in these three countries. In this case, taking distance from the countries mentioned is used to imply that there should not be such a difference.

> The draft law of the Left Block responds to an unqualified situation where the unemployment rises at the same time that social protection declines. Right now, we have over 300,000 people - men and women, entire families - who do not have a euro to live. Mr. Deputy, if this is to promise the best, then you are not on the left for sure, because being leftist is to respond to this social crisis, the social crisis of the people, to which the Socialist Party has an obligation to respond. It is not worth it, Mr. Deputy, to talk about replacement rates, because being unemployed in France, Sweden or Germany is not the same as being unemployed in Portugal - and the Honourable Member knows this very well. - Because the salary level is quite different (Parliament of Portugal, 22 January 2010, p. 45).

Differentiating from other countries may also be used to prove that one's country is in a better position than the others. In that sense, the strategy of differentiation is to defend the country's policy. We can see this in the quote below from the Spanish parliament, where the MP is pointing out the good situation of Spain compared with France and Italy.

> It is important to underline, ladies and gentlemen, that the refinancing needs of the Spanish Treasury are relatively low in terms of GDP when compared with those of other countries in our area. This is due to our relatively low level of indebtedness. Throughout 2010, the total refinancing of the Treasury will represent 13.7 percent of GDP. In France, this figure rises to 15 percent and in the case of Italy; it is around 20 percent of its gross domestic product (Parliament of Spain, 19 October 2010, p. 5).

On the other hand, distancing from others can be a means to demonstrate the bad position of the country. For instance, in the Portuguese quote below, the parliamentarian emphasizes the Portuguese problem by mentioning that Greece is better regarding the comparison.

> What we have at this moment is that Portuguese companies are financing more than twice the average in the Eurozone, even more so than in Greece. Look, Mr. Minister! It is harder for a company to finance itself in Portugal than in Greece (Parliament of Portugal, 19 October 2012, p. 14).

The purpose of distancing the country from others might also be to show that the parliamentarians do not sympathize with certain policies enacted. In other words, MPs try to convince the audience of what they should not do by referring to other countries. Here is one example from the Portuguese parliament:

> The example of Ireland, for years present in the speech of the right, is there to show us the recessive policies. Ireland was the first country to cut wages and raise taxes, as it is now defended by the Socialist Party and the Social Democratic Party, it is now the third country in the world in greater danger of a bankruptcy and it has the highest interest rates on public debt. In addition, this budget precisely wanted to perpetuate this spiral of degradation. Do not say, ladies and gentlemen, that this has to be the case. Just do not learn from the mistakes of others who insist on adopting them, even though with the awareness that they will cause harm. Look at Ireland, look at Greece: they have done what was considered in our SGP and in this Budget as a solution and the truth is that they are worse than before (Parliament of Portugal, 2 November 2010, p. 80).

Identifying the country with other countries

Another strategy of referring to other countries is to identify the country with some others. It is a means to make more sense of the domestic situation, but this time by pointing out similarities. As shown in the quote below from the Spanish parliament, where a MP is identifying Spain with Italy, Belgium and France to show that all of them have problems in the fluctuation of the risk premiums, and that the Spanish government is not the only one that is struggling with this situation.

> In the sovereign debt markets of the Eurozone these uncertainties have once again led to significant fluctuations in risk premiums, with worrying and unjustified increases in countries such as Spain and Italy, but also in others, such as Belgium or France, whose risk premium has also reached its maximum levels since the creation of the euro; and the credit default swap,

> the so-called CDS, have approached 200 basis points (Parliament of Spain, 23 August 2011, p. 3).

In addition, parliamentarians might refer to other countries to express an aspiration. In such a case, a MP does not show similarities between their own country and the others mentioned at the present moment, but rather indicates the desire of identifying with them in the future. We can observe this type of reference in the quote below from the Spanish parliament, where the parliamentarian refers to Germany and the USA as good models for dealing with public debt. This reference serves as a suggestion for the Spanish government about how to react in the current situation.

> That is why for years you have risen one tax after another-, while paradoxically, we are seeing that in other countries; as for example in Germany, they have not based their economic policy on that authentically Lutheran austerity that you exhibit. For example, in 2010, in Germany, the deficit grew to 5.4 percent of GDP, when in 2008 they still had a 0.2 percent surplus. How? Well, for example, helping companies to retain employment, especially those that generate exports. What have the political actors in the United Stated done? For instance, they have spent almost 790,000 million dollars and have created 3.3 million new jobs. That is, the public deficit, ladies and gentlemen, is like cholesterol, there is good and bad one (Parliament of Spain, 19 October 2010, p. 33).

The allusions to other countries are not only to serve as policy examples. Rather, they are also invoked to show that there is a problem, that indeed they are in a crisis. The analysis shows how Portuguese and the Spanish parliamentarians define the situation of their country by comparing it to other countries. On the one hand, parliamentarians may point out that, although the situation is serious, there are others who are in a much tighter spot. On the other hand, they can allude to other countries to prove how critical the situation is and to call for a proper solution.

To recap, the data shows that parliamentarians use references to other countries in order to position their own country in relation to the others. In that way constructing reference groups was done by using different strategies: citing one or more countries, attributing a characteristic or a name to them and using ranking lists or statistical comparisons. Furthermore, these strategies are used to *distance* or *identify* the country with some others. The objective of such comparison is to convince others about the ideas that a speaker advocates.

The difference between Spain and Portugal in international references

Regarding cross-national comparisons, in these two national parliaments MPs use the same discursive strategies in referring to other countries. Besides, these two countries are similar in many respects, including the fact that they both faced problems related to the global financial crisis that started in 2008. So, what explains the different patterns in the ways in which parliamentarians refer to different countries when debating national policy-making?

The data shows that differences between Spanish and Portuguese parliamentarians' referencing patterns have to do with how commonly different clusters of countries are used as reference groups. One such cluster of countries is composed of Greece, Portugal, Spain, Ireland and less frequently Italy. These countries are recurrently lumped together when debating the economic situation, its problems and consequences. They are repeatedly grouped together as the 'crisis countries'. Let us take an example from the Portuguese parliament:

> Portugal, Spain, Greece and Ireland face difficulties in the international financial markets and overcoming these difficulties imposes a large-scale budgetary demand and austerity (Parliament of Portugal, 2 November 2010, p. 96).

Another group that appears recurrently in the debates is the cluster of what can be named economically well-off countries, typically composed of France and Germany, but also the UK, the USA and some other Northern European countries. In the majority of cases, these mentions are used to show the bad or disadvantaged situation in which the country is. Here is an example from the Spanish parliament:

> The socialist model has impeded that the economic resources gave the results desired. That economic effort has resulted in significant changes such as that the expenditure per student in public education in our country is above our neighbouring countries such as France, Germany, the United Kingdom or Finland and yet our results are infinitely worse. Therefore, we are convinced that the improvement of the education system requires necessarily a change of model, a better rationalization of resources and more efficiency in their application (Parliament of Spain, 17 May 2012, p. 24).

It is the use of these two clusters, the "crisis countries" and the "well-off countries", in these two national parliaments that explain the differences in the referencing patterns. In the majority of cases in Portugal, speakers justify and explain their situation by resorting to the labelling of crisis countries: typically Spain, Greece and Ireland. In contrast, Spanish speakers distance or identify the country with Germany, France and the USA, countries that can be considered bigger and economically well-off. This does not mean that Spanish parliamentarians do not consider Spain being in a crisis; they just resort to a different reference group when explicating their views.

Hence, the discursive strategies and purposes for referencing other countries in national political debates are similar in both countries. The differences in frequencies with which different countries are mentioned as examples stem from the use of different reference groups in political rhetoric.

Discussion and Conclusions

In this study we set out to analyse how the MPs make use of other countries when debating policies in the national parliaments. By studying the Portuguese and Spanish parliaments in the period from 2008 to 2013, we focused on a critical moment when these two countries of the Iberian Peninsula faced similar challenges. Even though these two countries can be grouped together for several reasons, their parliamentarians' referencing patterns differed from each other. While Portuguese parliamentarians alluded to crisis countries more often, parliamentarians in the Spanish parliament appealed to the example of bigger and economically well-off countries more frequently.

The analysis shows that the parliamentarians construct reference groups by alluding to other countries in debating national policy-making. These reference groups can have different purposes in their talks. The MPs can mention other countries to distance the country from a reference group, but they can also allude to a cluster of countries to identify the nation with it. Therefore, the use of references to other countries in the parliamentary debates serves as a way to locate the nation on a map, to make the situation of the nation and the parliamentarian's view more illustrative and plausible. The analysis shows that the different referencing patterns in these two national parliaments stem from the tendency of politicians in these two countries to use different reference groups for explicating their views: Portuguese politicians allude to "crisis countries", whereas Spanish politicians use "well-off" countries as their point of comparison. These different patterns may imply that citizens in these countries place their own country on the map of nations differently, but does not mean that Spanish parliamentarians refuse to admit that Spain is in a crisis; they just build their argument differently.

As discussed in this paper, taking other countries as examples and objects of comparison in political rhetoric can be characterized as identity work. Parliamentarians mention a particular country or group of countries to point out a policy success and consequently, propose a practical solution for one's own country due to the embedded assumption that these countries are similar. On the other hand, a policy enacted in a country can be objected by arguing that country is different from one's own. Hence, this kind of identity work understood as a contextualization process matters in political discourses.

As policymakers try to persuade the audience by arguing and providing examples from other countries, compatriots resort to certain reference groups in their political discourse because they are understandable, well-known and shared among the citizens. Frequent citations to some countries reflect a perceived affinity to them. This affinity to some countries can have different reasons such as geographical location, organizational memberships, or historical, cultural and socio-economic resemblances. This is evident in the important presence of EU countries or the USA as references, while Asian or African countries are almost non-existent. The fact that policymakers in Spain use more references to Germany or France is because, despite being a southern European and a crisis country, regarding the economy and population it is a big country, one of the big five in Europe. Therefore, Spanish parliamentarians resort more often to European that they consider similar, within the same category. Likewise, Portuguese parliamentarians appeal more often to countries that they consider part of the same league, such as the southern or crisis countries, because these ones make more sense to the national audience.

In this respect, the countries more frequently mentioned form the main reference group. In the national political discussion actors invoke these countries because they are familiar to and recognisable within the nation. Compatriots are familiar with the situation and policies of countries that are perceived as part of the same group. Within the reference group composed of countries that are most commonly mentioned in political rhetoric, there can be different types of countries—from countries that are admired to others that are considered similar, and to ones from which parliamentarians want to keep a distance. Among the immense possibilities of references to other nation-states, politicians use more repeatedly the ones they think work best in persuasion and are recognizable to the national audience.

Another broad aim of this study was to shed more light on how the synchronization of national policies through epistemic governance takes place. Considering the ways other countries are evoked and the role that they play in political rhetoric, we suggest that reference groups play a significant role in the synchronization of national policies. As political actors in nation-states keep an eye particularly on policies enacted in their reference group, national states end up synchronizing their moves with those closest to them culturally and politically. Consequently, the global travel of ideas does not mean that all national policies converge, but countries do react to the same major events and trends (Alasuutari, 2016).

Our study also supports previous arguments from Simmons and Elkins (2004), who point out that governments do not learn from policies enacted elsewhere randomly, but rather through intergovernmental networks established between culturally proximate countries. Additionally, our results align with Strang's and Meyer's ideas (1993), who argue that cultural similarities represent a key aspect facilitating cross-national policy transfer, as decision-makers will pay attention to the experiences of countries with which they share cultural ties. Several other scholars have also pointed out the importance of shared history and cultural affinities in policy learning and diffusion (e.g., Lenschow, Liefferink, & Veenman, 2005; Omelicheva, 2009; Weyland, 2004). However, our study goes a step further by showing that although governments learn from different countries, depending on national context, MPs use the same discursive strategies with which they contextualize the nation through cross-national comparison. On the other hand, our results differ with Rivera's (2004) suggestion, according to which policy-makers copy policies from other countries even regardless of cultural, geographical or historical ties.

Our analysis has limitations in terms of the material and time span as the empirical purpose was to focus on the parliamentary debates in these two countries during the recent economic crisis period. Therefore, we do not assume that these reference groups are specific to this period, nor that the reference groups do not change. It would be interesting for future research to analyse whether and how the reference groups vary in time, depending on the situations, ties and affinities of the moment or the aspirations of the nation. In addition, it could be interesting to study what are the countries within these reference groups that are used particularly to ridicule the national situation or to point out achievements. Finally, this study can be also extended to other countries and other public talks such as the national media.

Notes

1. The World Bank, Data Base. *GDP per capita (current US$) in Portugal and Spain*. Available online at: https://data.worldbank.org/indicator/NY.GDP.PCAP.CD?locations=PT-ES&view=chart
2. Both newspapers are about general information and they have a great rank in readers. El País is the most widely read general newspaper in Spain with 1.851.000 readers per day [Data from the Asociación para la Investigación de Medios de Comunicación (Association for the research around media communication) from October 2012 to May 2013]. Correio da Manhã is the most

widely read general newspaper in Portugal with 1.206.000 reader per day [Data from Barem Imprensa from 2014.]

3. Centre for Social Studies, University of Coimbra. *Observatório Sobre Crises e Alternativas*. Available online at: http://www.ces.uc.pt/observatorios/crisalt/cronologia.php
4. The tables only show the five countries more mentioned in each parliament. In the data set, there are other references to other countries. First, there is a predominance of European countries. Among the European countries, the Western ones are more invoked, whereas the Eastern ones are almost non-existent in their talks. In a second place, we can perceive references to big and powerful countries such as the USA and China. Thirdly, we can also notice how some former colonies have a presence in their discourses, although they are not as recurrent as some other countries. This is the case of Brazil, Angola and Mozambique or, Cuba and Argentina. In addition, it is observed how there are not many references to African and Asian countries.
5. All data excerpts are translated from Spanish and Portuguese by the authors.

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II

The spread and domestication of the term "austerity": evidence from the Portuguese and Spanish parliaments

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The Spread and Domestication of the Term “Austerity”: Evidence from the Portuguese and Spanish Parliaments

This article explores what happens when the term “austerity” becomes a global catchword. Specifically, we study how this term has been used in national policy making in the Portuguese and Spanish parliaments from the 1970s until recently. We show that although Portugal and Spain were in a somewhat different situation regarding the 2008 economic crisis, the increased popularity of the term austerity occurred practically simultaneously in the Portuguese and Spanish parliaments. This suggests that the term’s popularity in political debates is not solely determined by a nation’s political or fiscal situation. Rather, our contention is that employing the term austerity to discuss government policies became a global fashion after the fiscal crisis of 2008. The study also shows why austerity became an increasingly popular concept: the term changed from being mainly used in fiscal policy to being commonly used in other policy areas too.

Keywords: Austerity, Economic Crisis, Parliamentary Debates, Europe, Spread of Ideas, Discursive Politics, Discourse Analysis, Political Concepts, Valence, Floating Signifiers, Domestication, Catchword, Portugal, Spain.

Introduction

Austerity has become a fashionable term in recent years. In fact, the Merriam Webster dictionary named “austerity” its “Word of the Year” in 2010 after an increase of over 250,000 searches for this term in its online dictionary. The term became an international trend for naming government policies after 2008, mainly because many international organizations started proposing, recommending, and even pressuring states to adopt austerity policies after the bailouts as a remedy to economic imbalance, (see e.g., Kriesi 2002; Panitch and Gindin 2009; Potts and Montero 2010). As such, different nation-states, at the same time, started addressing economic problems and public debts by following this international recommendation (see e.g., Petry 2013; Salomon 2015; Walter 2016). In the meantime, many social movements and political parties, especially in Europe, challenged the wisdom of “austerity” (see e.g., Della Porta and Mattoni 2014).

In this article we investigate the ways in which the term and concept of “austerity” became so popular in political discussions. This is an important topic from the perspective of the global travel of ideas: new concepts emerge, spread, and become used in different countries and spheres of life. It is crucial to study the process by which a term turns into a catchword that becomes used in ever-new contexts, re-framing, and reorganizing political discourses and actual policies. To address this issue this article traces how the term "austerity" (*austeridad* in Spanish and *austeridade* in Portuguese) has been used in Portuguese and Spanish parliamentary discussions from the 1970s until recently. We selected these two countries as case examples because, first, the global financial crisis from 2007 onward hit them hard, making plenty of discussion on austerity measures in the national parliaments very likely and a good source for analysis. Second, Portugal and Spain provide an interesting comparative pair in that the timelines of the crises differ in some critical ways. In 2011–14, Portugal experienced an international bailout. Spain was not bailed out, although it received rescue loans from Eurozone funds in 2012. Starting from the assumption that the prevalence and contents of the discourses on austerity reflect a country's economic situation, we could therefore expect to find that the discussions in these countries have different patterns. Nevertheless, as our analysis will show, the timing and discussions on austerity in these countries differ very little. This shows that very similar discourses on austerity spread transnationally without necessarily requiring much specificity as to the political situation of the country. Indeed, an explosion in the use of the term austerity started in the Spanish parliament in 2008 and in the Portuguese parliament in 2009, reaching its peak in the Spanish parliament in 2012 and in the Portuguese parliament in 2013. Our explanation for this increased use is that the concept acquired new meanings and brought new discourses to bear, which is why it spread from fiscal policy to other issue areas.

The rest of the article is organized as follows. After discussing the theoretical framework, the data and methods are introduced in more detail. The empirical analysis is divided into three sections. First, we introduce and describe quantitatively how the term austerity has been used across the time span studied. Second, we identify the different ways in which austerity has been used as part of the justifications for national policy making. Third, we explain how it has been used in different policy areas and by different political parties. Finally, we discuss our findings, linking them to the larger theoretical framework.

The Appearance, Diffusion and Domestication of Global Ideas: The Case of "Austerity"

After the collapse of the Lehman Brothers and the beginning of the global financial crisis, governments across the "developed" world, especially in Europe, introduced austerity policies (McBride 2014). But what is austerity? Although this term was used to describe dry or stark conditions before the Second World War, it was not until the 1950s that it started to acquire economic connotations (Anderson and Minneman 2014). This might refer to different things, such as adopting a debt-reduction package based on tax increases, or adopting spending restraints on social programs (de Rugy 2013). In fact, many scholars suggest different interpretations of what defines austerity (see Blyth 2013a; Lanchester 2013; Bramall 2013; Anstead 2017), which makes it evident that there is no clear consensus on its meanings, definition, and scope (see also Anderson and Minneman 2014).

When discussing and evaluating the possible benefits and drawbacks, there are also many opinions. For example, some authors point out the inappropriateness of austerity as it does not help to re-establish growth and the economy in a general sense (see Guajardo, Leigh, and Pescatori 2014; Theodoropoulou and Watt 2011), causing at the same time alarming social costs (Clarke and Newman 2012). Others, however, suggest that austerity can generate growth (see Alesina and Perotti 1997; Alesina *et al.* 2002). Yet the lack of a general agreement about the meaning of austerity and the variety of ideas on its effects and benefits has not impeded this term from becoming popular and widespread. Clarke and Newman (2012) remark that it seems to be a dominant piece of global wisdom in the political domain. Relatedly, as Fontana and Sawyer (2011) argue, ideas about austerity measures are powerful, as no policy maker around the world seems to be immune to them.

Authors offer different explanations as to why austerity became dominant and prevalent in public policy. For instance, Dellepiane-Avellaneda (2015) suggests that influential networks of policy experts exert a key role in defining solutions to problems such as economic crises. Helgadóttir (2016) shows that economic models such as the concept of expansionary austerity espoused by a network of economists from Bocconi University, Milan, have shaped responses and actions in the 2008 financial crisis. Others conversely focus on differences in approaches to it. Lallement (2011), for instance, demonstrates that austerity measures and adjustment mechanisms in the labor market have varied from country to country. It has also been suggested that the ideology of the party in government affects the way austerity is approached (Mulas-Granados 2003). For example, Tavares (2004) argues that left-wing governments tend to decrease the budget deficit by increasing taxes, whereas right-wing governments frequently count on spending cuts. Traditionally, it has been suggested that parties from the right are more likely to advocate neoliberal ideas such as austerity, whereas parties representing the left tend to support Keynesian ideas (Boix 2000; Alesina and Rosenthal 1995). However, many scholars point out that austerity obtains predominance in politics even in countries that do not have a right-wing government (Jabko 2013). In addition, Anstead (2017) suggests that the polarization between the pro-austerity right and anti-austerity left is not so neat.

As the literature indicates, austerity has gripped the global political scenario. Therefore, in this study we want to empirically look at the ways in which the term austerity has been used in political discourses and has gained a central position in debates on economic policy. This relates to the wider theoretical discussion on how ideas spread globally and become domesticated nationally. It has been argued that ideas matter in politics (Jacobs 2009; Schmidt 2008) as they influence policy outcomes (Béland and Cox 2016), but discourses also matter for policy changes (Schmidt and Radaelli 2004; Schmidt 2001). Hence, discursive institutionalism is an umbrella concept that helps us to understand and analyze ideas and discursive interactions within an institutional context (Schmidt 2012). Although ideas and discourses are key elements, they cannot be considered independent entities (Schmidt 2012). Ideas do not "float freely" (Risse-Kappen 1994) and discourses need to be produced. Put differently, there need to be agents who communicate ideas through discourses (Schmidt 2015). It is through the discursive interactions that agents argue, deliberate, and possibly end up participating in collective action. This is especially important in the political sphere, where policy makers need to coordinate discourses among policy actors to reach agreements on policies. The agreements are not often clear-cut; rather the process of deliberation and argumentation implies a variety of different discourses and ideas. Agents, at the same time, cannot generate isolated discourses and ideas if they want to produce an impact on the policy in question. Policies need to be grouped with similar ideas and discourses into discursive communities to influence and shape policies (Schmidt 2012). As Schmidt (2011) points out, this interactive process in institutional contexts contributes to policy change, which is always continuous and dynamic.

Following Carstensen (2011a, 600), the concept of idea can be defined as a "web of related elements of meaning." However, not all the ideas gain the same importance. An idea can be considered successful when it generates enough critical support to be adopted into policy (Béland and Cox 2016). To become successful, ideas need to have ambiguity or polysemy. In other words, ideas need to mean different things to different people. These qualities generate conflicts and contradictions in their application and understanding, but at the same time they make such ideas more appealing to a greater number of people. Thus, actors try to mold an idea in a way that helps them to build support (Béland and Cox 2016, 431). Similarly, Jenson (2010) claims that highly ambiguous and polysemic ideas are likely to better appeal to coalition builders than strictly defined concepts. It is for this reason that Béland and Cox (2016, 429) argue that ambiguous and polysemic ideas can have the capacity to act as "coalition magnets": they can appeal to different individuals and groups and used strategically by policy entrepreneurs. For instance, Hofferberth (2015) shows that the conceptual vagueness and ambiguity of "global governance" have constituted it as a "floating signifier"– that is a deluge of different and multiple meanings and interpretations. Similarly, Jabko (2006) suggests that the European Union (EU) has chosen "market" as a key concept for building power at the European level. However, various ideas about the market are used to justify different integration actions: the market is used as a constraint in the financial sector, as a norm in solar energy, and as a space in the regional economic sector. Apart from ambiguity and polysemy, Cox and Béland (2013) advocate valence as another important quality. For them, valence denotes the attractiveness of an idea, which can be either positive or negative in nature, and high or low in intensity. From this perspective, ideas have much more political impact if they are high in valence: if they generate strong reactions in people regardless of their political preferences.

As to how new political ideas emerge, Carstensen (2015, 284) stresses that "ideas do not emerge from an absolute origin but instead are created when a set of ideational elements are yoked together by political actors," creating what he calls "ideational novelty." Their meanings are constituted by infinite connections back in time (diachronic) or across other ideas (synchronic). As their meanings are based on their relation to other ideas, and these are never totally fixed (Laclau and Mouffe 1985), ideas may change (Carstensen 2015). Yet, ideas do not change by themselves. Actors need to use and activate them strategically for a political purpose (Béland 2005). Carstensen (2011b) argues that actors are *bricoleurs* (a term first used by Levi-Strauss 1962) as they recombine elements from the existing repertoires of ideas to create new meanings. Therefore, ideas are in constant flux and come from everywhere (Kingdon 1984). But not all of them survive and prosper; some vanish (Kingdon 1993). In this line of research, it is said that "an idea's time has come" when there is a change, when there are new events on the agenda that open a "window of opportunity" for new ideas to impact upon politics or resolve political issues at a precise moment (Kingdon 2003). Previous research has suggested that ideas are important to explaining new events such as crises (Blyth 2013a; Schmidt 2014). But new events can also reformulate ideas (Anstead 2017). The interest in ideas, however, remains contingent upon their impact and receptivity in a given situation (Kingdon 1984). Impact and receptivity can, of course, be national and transnational (Béland and Cox 2016).

In ideational theory, scholars also stress that crises give rise to new ideas due to a different and unstable situation, laying foundations for their emergence (Anstead 2017; Baker and Underhill 2015). As Blyth (2013b) observes, ideational change is a consequence of the dynamism needed for rational information updating, learning, and error correction. When there is instability and uncertainty, actors look for new discourses and interpretations to explain the particular circumstances in which they are absorbed, and to find proper solutions to deal with them (Chwieroth 2010). Accordingly, previous studies have suggested that political actors resort to new and alternative ideas and discourses when there is a new political situation in which previous ones do not work, and crises may be examples of this (Carstensen 2011a; Béland 2009).

Research on the global travel of ideas, on the other hand, suggests that "actors in different national states are receptive to the same signals—such as signs of economic booms and recessions—and respond to them similarly" (Alasuutari 2016, 163). Béland (2009) notes that policy ideas often gain a transnational dimension through the actions and discourses of think tanks, politicians, academics, and international organizations like the International Monetary Fund (IMF) (see e.g., Chwieroth 2007). Accordingly, Simmons, Dobbin and Garrett (2008, 7) point out that national decision making is interdependent; "policy decisions in a given country are systematically conditioned by prior policy choices made in other countries."

Related to the global travel of ideas, the "Stanford School" of world society theory also stresses the importance of international organizations as conduits of ideas or policies. A plethora of studies show that the current situation of a country—i.e., the suitability of a policy to the domestic conditions—does not predict well which countries are the first to enact a model that spreads worldwide. Rather, whether a nation-state enacts a particular worldwide model appears to depend on how well connected the decision makers are to the international organizations that promote it (Shandra 2007; see also Hafner-Burton and Tsutsui 2005; Hafner-Burton, Tsutsui, and Meyer 2008). Consequently, governments make reforms that are badly suited to their current situation (Meyer 2004).

Since ideas and catchwords spread globally, it is also important to note the institutional conditions for their adoption and domestication (Alasuutari and Qadir 2014) in different national and organizational contexts. In this respect, Strang and Meyer (1993) emphasize *theorization*: for ideas to travel transnationally, they have to be developed into abstract models, which means that they are easily transferable. Furthermore, if adopting a term is connected to money or other material interests, it easily spreads among those who could benefit from referring to it. For instance, the term "social cohesion" became increasingly popular from the mid-1980s onward, especially within the European Union, because it depicted a new policy instrument—the so-called Cohesion Fund—that aimed to even out the differences in wealth among the EU member states (Alasuutari 2016, 130-44). Similarly, the catchphrase "war on terror," coined by the administration of President Bush in 2001, spread far beyond its original meaning to varied contexts and uses; for instance, in Pakistan. That is, actors began to discuss otherwise unrelated events—including women's rights and honor killings— through the lens of the war on terror. The underlying motive for this national domestication of the catchphrase was the general conclusion by most Pakistan politicians, analysts, and even civil society members that the world "owes us," especially financially, for fighting this war (Qadir and Alasuutari 2013).

Existing scholarship thus suggests several hypotheses to be examined in the empirical part of this study. On the basis of the theories that stress the right moment—such as a crisis—as a key condition for an idea to be adopted in a "recipient country" we could expect that the frequency with which domestic politicians evoke the concept of austerity follows a national pattern. On the basis of world society theory, on the other hand, we could assume that, once austerity becomes a worldwide catchword, political actors would start using the concept regardless of the domestic situation. What explains the increased use of the term austerity in national political debates leads to another set of questions. Does its conceptual travel mean that austerity is evoked in an increasing number of contexts; or that it re-frames various disputes as its instances?

Data and Methods

To study in detail how the term austerity has been used in policy making, we analyze parliamentary plenary sessions from two countries: Portugal and Spain. The reason for choosing these two countries is that they are good examples of nation-states that have suffered from the recent economic crisis. Major reforms and cutbacks were made (Andrade and Duarte 2011; Royo 2013), which is why it can be expected that there was plenty of discussion on austerity measures in the national parliaments. Furthermore, these two countries represent a good comparative couple as they share many cultural, historical, and state development ties: the constitution of democracy after the dictatorships was achieved more or less at the same time, as was the case with joining international organizations such as the EU (see e.g., Sardica 2014; Queirós 2009). In addition, they have been grouped as part of the same family of nations (Obinger and Wagschal 2001), which makes the two countries easily comparable. Finally, in terms of practical accuracy, these two countries were chosen because they share the same Latin etymology, meaning, nature, and usage of the term austerity, which makes them comparable regarding language and discourses.

At the same time, they are interesting cases due to some differences: while the Portuguese government received bailout packages for the state from June 2011 until May 2014 by the "Troika" (European Central Bank, European Commission, and the International Monetary Fund), in Spain the bailout was conducted only in the banking sector in 2012 (Afonso, Zartaloudis, and Papadopoulos 2015). Hence Portugal received financial support conditional upon the reforms included in the Memorandum of Understanding (MoU) (Moury and Standring 2017), which forced the government to comply to a series of rigorous obligations (Gorjão 2012). In Spain, there were no such obligations, but structural reforms were requested to purchase sovereign bonds (Moury and Standring 2017). With the present study, we aim to ascertain whether and how these different conditions affected the frequency with which austerity was evoked.

The data used consist of all the parliamentary plenary sessions[1] covering the time span from 1975 to 2017 in Portugal and from 1977 to 2017 in Spain.[2] All the documents analyzed are public and easy to access through the parliamentary online data archives.[3] The time span of four decades is certainly long enough to detect discursive changes in the use of a term (see e.g., Tervonen-Gonçalves 2012). Parliamentary debates are particularly appropriate material for this study, as they provide a forum where global ideas are brought up and integrated into the political discourses within a nation. The significance of these public debates is that Members of Parliament (MPs) construct their arguments in ways that persuades the majority of the audience of what they propose to be the right and reasonable way to proceed in a given situation (Alasuutari 2016).

The analysis proceeded in three phases: the first two can be characterized as content analysis and coding and the third one as qualitative analysis. In the first phase, we calculated frequencies with which "austerity" as a term was mentioned during the entire timeline, with all the parliamentary plenary sessions as the units of analysis (Portugal N= 4394; Spain N=2767). This phase was conducted using the keyword search of the term austerity. In the second phase, hits of the term were coded according to policy areas. All the mentions of the term austerity that appear in the different debates or items on the agenda of the plenary sessions were coded, with all the debates that contain at least one mention of the term austerity as the units of analysis (Portugal N=1048, Spain N=801). This phase was also carried out using the keyword search of the term austerity and by a close reading to identify the topic or content of the debate in which the term is used by MPs. We coded the different parliamentary discussions into 11 policy areas to ensure the inclusion of all the different issues: civic policy; consumption; cultural policy; crime; education; environment; fiscal; foreign and security policy; health; science and technology policy; and social policy. This categorization has been established and used in our research project and in subsequent publications (Alasuutari and Vähä-

[1] Although there are different subgenres of parliamentary texts such as ministerial statements, interpellations, parliamentary speeches, questions etc. (see Ilie 2006), this study has analyzed parliamentary debates during plenary sessions in a broad sense, without any particularity on questions, speeches, or interpellations.

[2] This period corresponds to the reestablishment of democracy after the dictatorships. In Spain the new democratic era began in July 1977 after the first general elections for the constituent assembly, whereas in Portugal it was in April 1975.

[3] The parliamentary debates used in this study are available at the Assembly of the Republic (Portugal) and the Congress of Deputies (Spain). See http://debates.parlamento.pt/pesquisa and

http://www.congreso.es/portal/page/portal/Congreso/Congreso/Publicaciones/DiaSes/Pleno

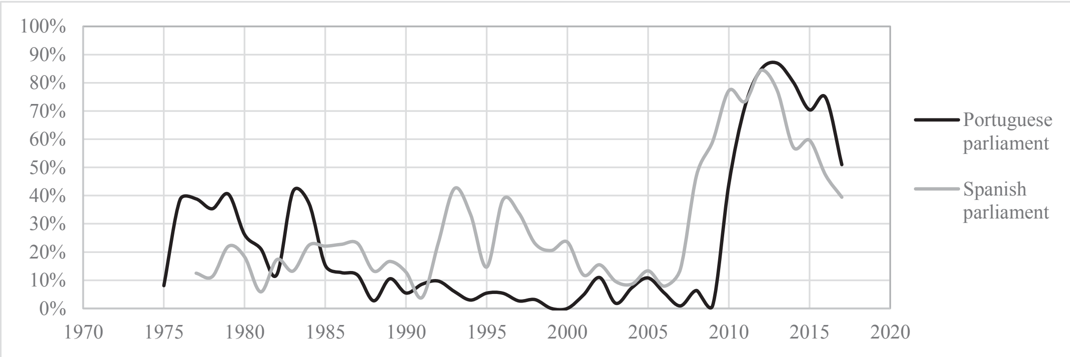
Savo 2018; Tiaynen-Qadir, Qadir, and Alasuutari 2018; Rautalin, Alasuutari, and Vento 2019; Alasuutari 2014a, 2014b).

In the third phase, we analyzed the ways in which austerity is evoked by MPs during the whole period in the different policy areas—that is, the arguments and premises put forward when mentioning austerity and the meanings attached to it. In this final phase, we used discourse analysis (Fairclough 2003; Hajer 1995). The interest was not in testing any pre-established categorization, but rather to identify different categories that can be inductively distinguished in the discourses and that include the different ways of invoking austerity. Following another principle in qualitative research, the aim was to create a categorization that applies to all ways of invoking austerity (Alasuutari, Bickman, and Brannen 2008), but without being mutually exclusive. To study whether and how the usages of, and discourses on, austerity have changed over time, we selected a sample to be analyzed discursively. We applied the principle of theoretical sampling (Gobo 2008), which means that the data analyzed contains examples of all different ways and contexts in which austerity is used in the parliamentary debates in these two countries. By applying stratified random sampling, we picked the samples so that they are spread as evenly as possible across different policy areas and years (Portugal N= 209; Spain N= 160).

The Rise and Spread of Austerity in National Policy Making

Although the term austerity has been used throughout the whole inspected period, it was after 2008 that its usage has increased considerably, coinciding with the economic crisis. As Figure 1 shows, in 2012 austerity was mentioned in 100 plenary sessions (85 percent) in Portugal and 65 in Spain (84 percent), whereas in 1999 and 2000 it was never mentioned in the Portuguese parliament and only in 15 (21 percent) and 12 (24 percent) sessions in the Spanish parliament in the respective years. Moreover, note that before 2008 the varying frequencies with which austerity was mentioned in these countries differ from each other. In the Portuguese parliament the term was more present in the first years of the reestablishment of democracy. In the Spanish parliament it was used more frequently in the early 1990s. The situation changed after 2008 when, in both parliaments, MPs started invoking the term more or less with the same frequency, showing parallel patterns.

Figure 1. Proportion of Parliamentary Plenary Sessions in Portugal and Spain Including the Term "Austerity"



As some scholars point out, applying austerity has always been an issue when tackling economic problems (Blyth 2013a; Clarke and Newman 2012). Indeed, there is a negative correlation with the percentage of annual GDP growth[4] and the percentage of the appearance of the term austerity in the plenary sessions. The correlation is quite strong in the case of Spain (-0.627, p significant at the 0.01 level), whereas in the case of Portugal it is considerably lower (-0,278, p significant at the 0.01 level). Hence, it is obvious that the term has become the "bread and butter" of MPs during an economic crisis.

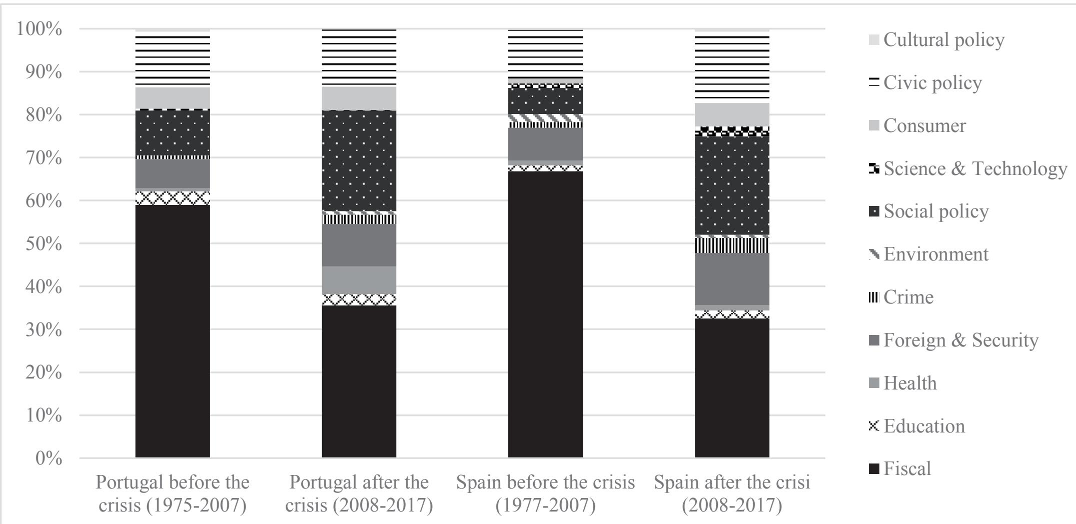
Our analysis of the Portuguese and Spanish cases documents that austerity became a global catchword after the 2008 economic crisis. Although the crisis hit these two countries in somewhat different ways and with a different timing, the patterns in the increased frequency with which MPs started mentioning the term austerity are very similar. This implies that the explanation can be found in the global spread of the discourse, not in the situations at hand in these countries at different moments in time.

To explain why it became possible and feasible for political actors to use the term austerity more frequently, we have identified and coded the policy area of each debate in which austerity is mentioned. As Figure 2 shows, austerity was a term mainly used in fiscal policy before the economic crisis. However, this pattern changed in 2008 when the exclusivity of this term in fiscal policy decreased, and consequently, austerity began to be employed increasingly in other policy areas. For

[4] The data of the GDP growth (annual %) has been obtained through the database of World Bank at https://data.worldbank.org/indicator/NY.GDP.MKTP.KD.ZG?locations=PT-ES

instance, in 1985 of all the mentions of austerity, 73 percent were in fiscal policy in Portugal, and 58 percent in Spain. In 2008 fiscal policy comprised only 14 percent of the mentions in the Portuguese parliament and social policy and education 29 percent each. Similarly, in 2016, fiscal policy comprised only 17 percent of the mentions in the Spanish parliament and social and civic policy comprised 39 percent each. Therefore, we can say that the increased popularity of "austerity" was made possible by the fact that it spread from its original, restricted use in fiscal policy to other policy areas where it was earlier rarely invoked.

Figure 2. Mentions of "Austerity" in Parliamentary Debates in Portugal and Spain before and after the Crisis by Policy Areas



Three Discourses on Austerity

How was it possible that speakers started to use the word austerity more frequently and in connection to other than just fiscal policy debates? Did the term acquire new meanings? To address these questions, in this section we analyze and compare how "austerity" has been employed before and after 2008. Of all the different mentions during this long period, we can identify three different discourses in which "austerity" is used differently or has a distinct connotation: *functionality discourse, fairness discourse*, and *ideological discourse*.

Functionality Discourse

Before 2008, when "austerity" was not so commonly used, most of the talk about it was in this very functional framework. In this type of discourse, austerity is evoked as a concrete plan of action to return to a certain economic stability. It is presented as a functional idea in which the primary intention is to reduce expenditures in order to be competitive and efficient. Within this discourse, austerity can also be understood as a demanding course of action that required a collective effort. Actors might show that nobody wants to apply austerity, but that it is necessary in some situations. In the statement below from Portugal in 2004, we can see how the speaker shows the evidence of its unpopularity, acknowledging the sacrifice that it represents. Austerity is here constructed as a necessary evil.

> After two years of great austerity and sacrifice, and even with the continuation of rigour on the expenses, there will be room to increase wages by more than about 2%, this is above the forecast inflation. (Parliament of Portugal 2004, 1006)

This notion of austerity as a functional solution is the prevalent discourse during the whole period. However, from 2008 onward, some actors start being critical of, or at least hesitant with, austerity as a working policy. MPs argue that austerity has the contrary effect to that which it is supposed to redeem: balance, growth, recovery, efficiency, competitiveness, etc. In some cases, speakers refer to certain arguments from abroad to illustrate and reinforce their idea, for instance by pointing out what some international organizations or scientists have said about austerity. We can see an example of this in the quote below from Spain in 2012:

> Fortunately, it is no longer just Paul Krugman or other Keynesian economists who tell us about the madness of European austerity. Two weeks ago the International Monetary Fund pointed out to us that budgetary austerity as the only economic policy is counterproductive, that the rapid reduction of the public deficit is having clear contractionary effects on economic growth and employment. (Parliament of Spain 2012, 57)

If austerity was earlier discussed at a more general level, where there was more consensus on its applicability and functionality, later austerity became a central topic discussed and observed in minute detail, generating a variety of opinions on it.

Fairness Discourse

In addition to the functionality discourse, “austerity” is also invoked to discuss and justify how it should be applied. This discourse was present during the whole period studied. In this discourse, austerity is debated in moral terms. The actors emphasize the importance of applying austerity correctly to ensure equality and good functioning of the state in a general sense. We name this talk *fairness discourse.* Within this discourse, speakers also debate what policies austerity should be applied to, so as to be as harmless as possible. In addition, actors normally justify that citizens and families should not be the main targets experiencing the drawbacks of austerity. For instance, we can find statements where speakers stress that the elites should be the main target of austerity measures. One example of this talk comes from Spain during the 1980s.

> Maybe that is not timely at this moment when we have to tighten our belt, we have to implement a policy of austerity, a policy of saving spending. Thus, we have to start setting an example as social leaders, deputies…but not only the political leaders, also the military sector should set an example. (Parliament of Spain 1980, 8561)

However, from 2008 onward, there are also some hesitations on whether there is a reasonable and proper application of austerity policies. For instance, a quote from Portugal in 2013 shows that the effects of austerity always go to the same people: the middle and lower class, the workers, and the families, etc.

> Regarding the austerity measures of your Government, Prime Minister, there are no longer two opinions: they are unjust measures that go to the same people as always, on the workers, on the retirees, on the most disadvantaged social groups. (Parliament of Portugal 2013b, 35)

As was the case with the functionality discourses, the fairness of austerity casts some doubts, generating criticisms on, and disputes in, politics after 2008.

Ideological Discourse

Finally, from 2008 onward, austerity is deemed as an ideology and starts to be understood as a way to act and frame political programs. In this discourse, austerity is not justified as a recipe to tackle some temporary economic problems. Rather, it is framed as a *modus operandi,* as something that goes beyond its economic connotations. Within this discourse, austerity is regarded as a large political program, the objective of which is not only or primarily to balance the budget, but to change the whole system and its power relations. We call this the *ideological discourse.*

> In the name of the crisis, what you did was to apply your ideology, the austerity, the most masochistic austerity, an austerity disguised as cuts and more cuts and, above all, the alarming request of efforts and overexertion to ordinary citizens. (Parliament of Spain 2017, 12)

As we can see here, austerity is articulated as something more than a mere economic intervention. For instance, speakers link austerity to neoliberalism, and call it a philosophy or ideology. In this way they claim that the true goal of those behind austerity measures is to change the current constellation of power, and hence to steer society. Within this discourse, the government is constructed in a new way. It is, for instance, depicted as composed of immoral individuals who just seek their own economic or ideological interest. In some other cases, they are presented as puppets who cannot act by themselves. Such puppets are described as individuals for whom austerity is a dogma that they blindly follow, or a mantra that they repeat without much consideration about what they are actually doing and on the impact that it can have, as in this excerpt from Portugal in 2013.

> What the Greens intended with this call was to show to the government that there is a world beyond austerity. They cling to the dogma of austerity and the dictates of the IMF as if it were orders; they remain willing to follow the instructions from abroad religiously. (Parliament of Portugal 2013a, 33)

To conclude, a close reading of parliamentary debates in these two countries shows that, despite some differences concerning the bailout, the discourses within which austerity is discussed are the same. Moreover, the increased frequency of the term coincides with new ways of using it in political talk.

The Domestication of Austerity into Different Policy Areas

What happens when there are new ways of using the term austerity? Does it somehow affect the fact that it is commonly used in different policy areas and by different political parties? In this section we analyze and explain how the term was used in different issue areas and by different political parties. As pointed out before, austerity has been a term mainly used in fiscal policy. When speakers talked about austerity in fiscal policy debates, they used it in a very functional way: it was presented as a very concrete and strategic action that even if it is not pleasant, it is a requirement for the economy.

Yet the hegemony of the functional discourse starts to crumble when "austerity" becomes prevalent in national policy making. The term began to be used more frequently in other political discussions. One reason that we identify here is that the impacts of austerity as such appear in many political spheres, not only on the fiscal one. Therefore, speakers evoke austerity to criticize cuts in the state budget that have important drawbacks in other policy areas, such as social policy, health, education, etc. Speakers start using the term when accusing people of a certain ruling style, and in that way it gets to be used in several other contexts than just when discussing fiscal policy.

When constructed as a whole political and ideological program with other motives than just balancing the state budget, austerity becomes used as a pejorative word. Here austerity becomes an abstract idea, something that can be interpreted in different ways and evoked to apply to many types of political programs. Hence, austerity is shaped as an "umbrella concept," as a term that can describe and fit many political arguments. Any decision or proposal to save or cut state spending can be framed within a larger project of austerity, which is why the number of potential contexts in which it can be used grows substantially. This also means that austerity is not only evoked by members of the cabinet, but also by the opposition. Indeed, at this point the critical views of austerity measures account for the majority of the mentions of the term. Austerity became an assault weapon to criticize its functionality and morality, and to depict the government as unscrupulous people or sheep without any decision-making power.

Traditionally it has been claimed that austerity, with its neoliberal roots, was an idea predominant within the right-wing parties. In this respect, it is interesting to observe who was in the government during the maximum pick of invocations of "austerity," that is, in 2013 in Portugal and in 2012 in Spain (see Figure 1). Certainly, in both cases right-wing parties formed the government (the *Partido Popular* in Spain, and the *Partido Social Democrata* and the *Centro Democrático Social-Partido Popular* in Portugal). However, it is even more curious to note that the explosion of the term austerity in parliamentary debates in Spain (2008) and in Portugal (2009) (see Figure 1) was at the time when in both countries left-wing parties formed the government (the *Partido Socialista Obrero Español* in Spain, and the *Partido Socialista* in Portugal). Therefore, the increase in the use of the term occurs irrespective of which government is in office. But why is this so? If we pay attention to the ideology of the MPs invoking the term austerity we can detect similarities: all invoke austerity as a shared effort, sacrifice, rigor, and responsibility. Discourses, of course, are adapted to suit the "mood of the time" or circumstances; thus, austerity is perceived as part of common sense. Yet when we observe what type of sacrifices or efforts they mean, there is variation among political ideologies. For instance, right-wing governments tend to focus the austerity on cuts in state spending, whereas the left-wing governments are inclined to raise taxes, especially on big companies and the business sector. In that sense, the abstractness of austerity as a term that encompasses different strategies and interpretations allows for it to be part of different discourses, strategies, and policy areas. Hence, the term austerity was also incorporated throughout the political and ideological spectrum to push for everyone's own austerity ideas or, as we mentioned before, to criticize the austerity ideas of the others.

Indeed, when new ways of talking about austerity emerge and become prevalent, it became easier to use the term in all policy areas. The same happens when it comes to austerity as an abstract term, or something else that its pure functionality and economic connotation; everyone can create their own "austerity," their way to understand, invoke, and apply it. Following the argument of Schmidt and Thatcher (2013), austerity is powerful not because is a defined policy prescription, but because it is part of political rhetoric. Therefore, framing political disputes and choices in terms of the ideological discourse of austerity turned into a routine thing in political talk, which explains the constant battle of this term in many types of political debates.

Discussion and Conclusions

In this article we shed light on how ideas spread by studying the case of the term "austerity" as an example of global catchwords. To do that, we examined how this term has been used in Portuguese and Spanish parliamentary discussions from the 1970s until recent years. Empirically, we show that, in national policy making in these countries, the term austerity was present throughout the whole period in both countries with varying intensity. However, its use has increased in recent years. Even though these two countries had different trajectories regarding an international intervention and bailout of state debt, the patterns regarding the frequency with which the term was evoked in these countries are quite similar. The turning point was the year 2008: hits of "austerity" in parliamentary talk increased significantly after that year. Furthermore, before 2008 the term was mainly used in fiscal policy, after which it began to be employed in other policy areas.

From a discursive perspective, we discovered that there was also a shift on how austerity as a term was used after 2008, with no remarkable difference between the two parliaments. Before that year austerity was principally referred to as a necessary means to achieve a balance in the state budget, and the discussion dealt with how austerity measures should be implemented. After 2008, such necessity is challenged and new ways of invoking the term appeared in the debates. On the one hand, MPs evoked austerity to question its functionality; and on the other hand, they articulated it as an ideology. Consequently, the term spread beyond its origins in economic policy discussions.

Furthermore, the term, framed within "ideology discourse," was also increasingly invoked by critics of austerity measures, which contributed to its increased use in political talk. This shift did not mean that the older "functionality discourse" disappeared; it coexisted with the new "ideology discourse." Therefore, we conclude that the increased popularity of the term can be explained by its new framings, which made it usable in new contexts.

The finding that the new framings of austerity, enabling a simultaneous explosion of its use in parliamentary debates in Portugal and Spain supports the conclusion that austerity became a globally fashionable framing term within which to conceive of, manage, and argue about the 2008 financial crisis. The developed world seemed to face "the age of austerity" (see e.g., Edsall 2012; Schoenbaum 2012; Ortiz and Cummins 2013): the catchword was promoted globally as a remedy and adopted nationally as a "magical" solution (see also Clarke and Newman 2012; Dellepiane-Avellaneda 2015).

It is important to note that although a fiscal crisis materialized in Portugal and Spain at different moments, the curves that indicate the frequency with which the term austerity was mentioned in these two countries are practically identical. This finding puts into doubt the alternative hypothesis that the adoption of an idea or policy model depends on the circumstances in the recipient country. One can of course argue that the 2008 financial crisis began in the United States and became immediately a global phenomenon that affected the entire world. Yet we can separate out global awareness of events that may have local repercussions from policies proposed for dealing with the potential consequences in national contexts.

We acknowledge that our study has limitations in terms of its scope as it concentrates only on the study of the term austerity. In that sense, some related terms and expressions such as reduction and cutbacks also shaped the discourses and measures on austerity although they were not directly addressed in our study. Moreover, our analysis is limited to two case studies. In this respect, further research could be conducted to see, for instance, whether the increased use of "austerity" started simultaneously and followed the same pattern in other countries. Finally, we do not think that our study provides an exhaustive list of reasons for the increased popularity of austerity. Rather, we acknowledge that there can be other mechanisms that explain how austerity has become a catchword. Previous research shows that international governmental and non-governmental organizations play an important role in advocating and spreading new ideas and discourses (Frank, Hironaka, and Schofer 2000; Alasuutari 2016). Hence, it would be interesting to study how international organizations such as the IMF, the World Bank, the EU, and the Organization for Economic Co-operation and Development have contributed to spreading and shaping national discourses and policies on austerity.

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PUBLICATION
III

Navigating coercion in political rhetoric: shifting strategies to cope with intervention by the Troika in Portugal

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Navigating Coercion in Political Rhetoric: Shifting Strategies to Cope with Intervention by the Troika in Portugal

This article examines how government actors of a nation-state cope with coercion exerted on them by an external source and how they evolve justifications and persuasive arguments when debating and reporting new policies in a setting that threatens to compromise national sovereignty and integrity. We approach the question by analysing two diverse political arenas: parliamentary debates and public accounts by political leaders in the media during the intervention by the Troika in Portugal. The study evidences a variation in strategies to manage coercion: the politicians use both depoliticization and relativization. While discourses of depoliticization are frequent in media, in parliamentary debates the predominant strategy is to emphasize the aspect of agency by relativizing the power of the Troika. Both strategies serve to portray responsibility in the face of external intervention, but in different discursive environments political actors use different rhetorical tools to work on their institutional appearance and legitimacy.

Keywords: coercion, political discourses, epistemic governance, legitimacy, Troika, Portugal

Introduction

The global financial crisis that erupted in the USA in 2007 has caused enormous economic and social problems in many countries, with a particularly negative impact on several European countries. Southern Europe has been especially affected by the economic crisis to the point of requiring international assistance to confront market pressures over their fiscal deficit and debts (Gorjão, 2012). The international bailouts were provided by the Troika, composed of the European Central Bank (ECB), European Commission (EC) and the International Monetary Fund (IMF). The bailouts were agreed between the debtor government and the creditors (ECB, EC, IMF) through a process of bargaining on conditions and negotiations that ended up with an agreement– that is the signature of the Memorandum of Understanding (MoU), which explicitly detailed the reforms that should be implemented (Armingeon and Baccaro, 2012). This international involvement in the national policy-making of some European Union Member States has exerted an anomalous influence over national policies' content and it has impaired their autonomy (Armingeon and Baccaro, 2012; Streeck, 2014).

The intervention by the Troika has cast doubts on the legitimacy of the democratic process in the nation-states audited (see Armingeon and Baccaro, 2012; Culpepper, 2014; Sacchi, 2015). For instance, Streeck (2014) has argued that these states have seen their condition reduced to 'democracies without choice'. Matthijs (2017) has argued that the Euro Member States that have suffered the most from the crisis have also experienced a substantial deterioration in the strength of their democratic institutions, as they were forced to choose 'integration' at the expense of both 'democracy' and 'sovereignty'. In some cases, national governments have implemented reforms against their will in return for bail-out loans (Featherstone, 2015; Gorjão, 2012). Hence, the Troika is perceived as exerting a direct control over the Member States bailed out – that is exerting coercive power (see Carstensen and Schmidt, 2017). Although the requirements established in the MoU are forceful and compelling, they must be submitted to acceptance in the parliamentary organ, which means that they must be tackled discursively by those holding national political power. Therefore, even if they are constrained by the Troika, national decision-makers still have agency in the procedure and the ultimate control of how to implement new reforms. In this paper our aim is to ascertain how government actors of a nation-state cope with coercion exerted on them by an external source and how they evolve justifications and persuasive arguments when debating and reporting new policies in a setting that threatens to compromise national sovereignty and integrity.

Earlier research has shown how a coercive context activates the tendency of depoliticization in justifications in national politics – that is the denial of the political character of decision-making (Standring, 2018). Therefore, decision-makers play down their room to manoeuvre, which was restricted but nevertheless existent, and thus overstating the constraints imposed on them by the Troika (Gago and Moury, 2017). National decision-makers may justify their decisions by means of various depoliticized discourses. For instance, by claiming that 'there is no alternative' (TINA) (Borriello, 2017; Séville, 2017), arguing that we are in a 'state of exception' (Fonseca and Ferreira, 2015, 2016), invoking the 'necessity and urgency' conditions (Standring, 2018) or even by 'shifting blame' onto international actors (Schmidt, 2007; Traber, Schoonvelde, Schumacher, Dahiya, & de Vries, 2016). These tactics can be used to show the outspoken unequivocal absence of choice and agency (Watson and Hay, 2003), or then the acknowledgement of alternatives, but only to warn against them as the capacity to act is limited (De Ville and Orbie, 2014). This has contributed to what some authors have claimed to cause the executives to centralize power in order to advance the proposed reforms, some of them 'going beyond the Troika' (Moury and Standring, 2017). At the same time, these tactics help government politicians to evade responsibility for making these decisions and for their consequences (Flinders and Buller, 2006).

In this study, we report an empirical analysis of two political environments and relate our findings to those of prior research in order to examine how common and straightforward the use of depoliticization actually is in political rhetoric dealing with coercion. We will compare politicians' talk in the parliamentary context to their statements in press conferences and similar media contexts during the intervention by the Troika in Portugal. The objective of our study is therefore not to evaluate the impact of the Troika on Portuguese policy-making, nor whether and how well they implement the loan programme (see Hardiman, Spanou, Araújo, & MacCarthaigh, 2019). Rather, we analyse the actual national political discourses to identify the rhetorical strategies by which government politicians justify their arguments and decisions on the Troika's mandate in two different political arenas.

Domestication of Coercion According to the Theory of Epistemic Governance

Our analysis of the rhetoric used by government politicians in managing intervention in Portugal by the Troika, continues and extends the research on how and in what ways impositions from international organizations (IOs) are used and justified in national contexts. However, it is important to note that the Troika is a particular type of international organization making recommendations. Its intervention is embedded in the organizational framework of the European Union and is intertwined with its membership obligations and imbalances. Given the pressure of unresolved economic crisis, Troika has been even further authorized by the Member State in question to take an enhanced role in terms of the hierarchy in command. Thus, the measures that the intervention imposes are binding obligations, a condition for providing financial support, where the nation has itself taken the initiative. Yet, at the level of political processes, the aspect of external coercion compromises national sovereignty and integrity. The setting exposes the deficiency and incompetence of the state to survive on its own through economic crisis, which puts the national representatives severely on the defensive in regard to justifications.

Two theoretical concepts are at the centre of our research: domestication and epistemic governance. Domestication is used to conceptualize the process generated when a new element is introduced into new terrain (see Haddon, 2007). In the case of politics, domestication implies the actual process and practices through which international or exogenous ideas and elements infiltrate national spheres, thereby affecting domestic policies (Rautalin, 2013). In this study, the Troika and its impositions were the new elements in Portuguese policy-making, and thus they challenged the existing routine and practice within the nation-state. In such a situation, politicians take and adapt the binding ideas to the nation, incorporating the impositions as part of daily politics and as natural and self-evident elements to take into account when justifying their claims (Alasuutari and Qadir, 2013).

In their efforts to domesticate coercion, politicians naturalize it and incorporate it into local practices with the help of epistemic governance – that is, with the help of the political rhetoric to persuade their peers and the citizens of what the current situation of the nation is and what reforms are to be made (Alasuutari and Qadir, 2014). To justify their political arguments and decisions politicians must produce discourses that are convincing. They therefore need to invoke ideas that are dominant and shared among the audience to gain their confidence. Even if the Troika was imposing policies, it was not expressing itself in the national political discussion, hence, ‘the battle was viewed as a domestic political drama with leading national politicians playing the leading role’ (Alasuutari, 2016, p. 21).

Consequently, responsibility rested with the politicians as they were in charge of the changes in policies to comply not only with the agreed measures for the bailout, but also to honour the citizens (see e.g. Brunsson, 2007). The legitimacy of representative democracies is guided by the idea of popular sovereignty, which refers to the sufficient inclusion of citizens in the processes and discussions on acute political matters through public channels of communication, allowing citizens to control, influence and evaluate formal decision-making (Habermas, 1996). Accordingly, government politicians faced with the Troika’s intervention needed to deal simultaneously with the demands from the Troika and the demands of popular sovereignty, which causes contradictions. How do the actors manage to maintain their responsibility and legitimacy within both settings? One strategy is to evade their responsibility, in this case by making the decision or the role of the decision-makers less visible, by showing how they were compelled by external forces (Brunsson, 2007), for instance by means of depoliticized discourses. This strategy is a way to achieve some actions without losing support or legitimacy, because if they publicly avoid responsibility, they cannot not be blamed for it (Brunsson, 1993). Earlier research has also shown that in conflicting demands of various stakeholders another strategy to maintain legitimacy is hypocrisy (Cho, Laine, Roberts, & Rodrigue, 2015). Decision-makers may find themselves ‘handling conflicts by reflecting them in inconsistencies among decisions and actions’ (Brunsson, 2007, p. 115). Hence, national decision-makers may apply the demands of the IOs, but without exactly articulating them. This may cumulate in policies ‘being done without their being openly accounted for’ (Brunsson, 1993, p. 492). However, as Cho, et al. (2015) have asked: how can they continually engage in hypocrisy and maintain any legitimate standing within the organization or within society? One answer to that is the organizational façades, ‘a symbolic front erected by organizational participants designed to reassure their organizational stakeholders of the legitimacy of the organization and its management’ (Abrahamson and Baumard, 2008, p. 437). As Abrahamson and Baumard (2008) suggest, there can be more than one façade to serve different roles in managing different stakeholders. In our analysis we will be looking at two separate institutional façades from the perspective of interactional research. It turns out that within these contexts politicians change the content of what they say and act out different roles of responsibility for a different set of primary recipients (see Goodwin, 1981).

Schmidt (2006) has proposed two main domains of political discursive interactions: the ‘coordinative discourses’ among policy actors in constructing, arguing, deliberating and reaching agreement on policies and the 'communicative discourse' between political actors and the public engaged in presenting, explaining and legitimating those policies. Although these domains are interconnected in terms of substantive content and interactive process, they do not always connect with one another (Schmidt, 2006). Schmidt (2014, p. 188) has also noted that EU level politicians use different discourses depending on the audience: other decision-makers, the markets or the people. 'Who is speaking, to whom, about what, where and why' (Schmidt, 2015) seems to be relevant in the interactive practices of political discourse. In a similar vein, Maingueneau (2010) has formulated the idea of types of discourses understood as sets of measures and norms of communication through which speech can be articulated and legitimized in a specific place and at a specific moment. Discourses are defined in terms of situational criteria in which the role of the participants, the purpose, the medium and the time-space framework are criteria for the spokesperson (Charaudeau, 1995; Maingueneau, 1996, 2010). Aligning with these thoughts, we will show that political discourse is indeed, 'recipient designed' (Sacks, Schegloff, & Jefferson, 1978) to convince the target audience. These situated recipient designs include various forms of normative address and anticipations which work on achieving institutional appropriateness and responsibility (Rautajoki, 2014). Our research demonstrates that the management of institutional legitimacy is sensitive to communicative occasions.

Within a political environment fraught with competing normative pressures politicians can adopt different strategies to maintain their responsibility and legitimacy (Rautajoki, in process). Even in the case of forceful Troika intervention decisions are ultimately submitted to parliamentary discussion and are voted on. In this paper we will show that no matter if the decisions made and actions taken stay the same, the talk to justify them can differ to manage the impression imparted to the general public and achieve legitimacy in different communicative settings. How, then, do politicians operate on variable justifications in specific situations?

To make appropriate claims and give valid accounts government actors need to consider what shall be deemed legitimate and how to legitimise their decisions to others at the level of local practices (Schmidt, 2016). Legitimacy and power are gained and maintained through actions, discourses and ideas. As pointed out in research, ideas matter in politics (see e.g. Jacobs, 2009; Schmidt, 2008) and influence policy outcomes (Béland and Cox, 2016). Ideas have a certain relevance or power when actors seek to promote their own ideas at the expense of others (Carstensen and Schmidt, 2016). Carstensen and Schmidt (2016) have pointed out three types of ideational power: *power through ideas* (italics in the original) as the capacity to convince other actors to accept certain views by using ideational elements; *power over ideas* (italics in the original) as the imposition of power to resist the inclusion of alternative ideas; and *power in ideas* (italics in the original) as ideational power, in other words, the authority certain ideas enjoy in structuring thought at the expense of other ideas. With our empirical case we can see how these three types are intertwined, as the intervention of the Troika in Portuguese politics already entailed a disparity regarding actors and their use of power to intervene in national policy-making. The coercive power that the Troika exerted in the bailout countries already implied a capacity to impose certain ideas and conditions without resorting to persuasion – that is, power over ideas (Carstensen and Schmidt, 2016).

However, national politicians had the last word, as the measures imposed needed to be discussed and allocated to national policies and reforms. Therefore the national government needed to further the ideas from the MoU and introduce them through reasoning or argument, that is, wielding power through ideas, as power over ideas can always be challenged and contested (Carstensen and Schmidt, 2016). At the same time, a political actor, for instance from the opposition, is able to question the ideas imposed or the arguments of the government likewise by using power through ideas (Carstensen and Schmidt, 2016). By this means, actors try to introduce new ideas into the policy programme. The key element in this type of ideational power is persuasion, as the power is based on the capacity of actors to influence others through argumentation. It is not enough to invoke ideas; actors need to believe in them to have the ability to persuade through them. Moreover, actors can imbue their discourses and ideas with more power by connecting them with powerful ideas as such. That is, actors may incorporate ideas in their discourses that already enjoy authority (Carstensen and Schmidt, 2016). Power in ideas could be seen as even more 'powerful' than coercive power; for example, to appeal to the nation and the citizens, to the common good or national sovereignty; or on the contrary, to invoke the imperative constraints in which they are immersed. In our research we connect the domestication framework with power through ideas and epistemic governance. We argue that external coercion is tamed discursively to appeal and persuade the rest through epistemic governance. In controversial political situations, the power that actors are able to exert through and in ideas is fundamental to contest and justify these compulsory measures (power over ideas) and to build legitimacy around the ideas proposed (Blyth, 2002).

Data and Methods

To examine how government politicians handle the aspect of coercion in their national political discourse when they are in receipt of conditional financial support, we present Portugal within the Troika bailout as a case study. Portugal experienced an increased fiscal deficit and debt in relation to Gross Domestic Product (GDP) in 2009, which led to rising pressure on the interest rates and a reduction in the demand for government bonds (Freire, Lisi, Andreadis, & Leite Viegas, 2014). In April 2011 Portugal, which was governed by the *Partido Socialista* (PS) in a minority government, was unable to meet the rising debt commitments and became the third European Union Member State to request financial assistance from the Troika (Cardoso and Branco, 2018). The MoU was negotiated during the electoral campaign and afterwards implemented by a coalition government composed of the *Partido Social Democrata* (PSD) and the *Centro Democrático Social- Partido Popular* (CDS-PP) (Moury and Standring, 2017). The austerity measures imposed in this international intervention had a significant impact on the labour market in Portugal: wage devaluations, reversal of working-time gains, flexible labour market practices (Costa, 2012), but also on the health care system (see Legido-Quigley et al., 2016) or the welfare system, with pension rights significantly restricted and welfare benefits less generous and more conditional (Zartaloudis, 2014). In May 2014 Portugal ended with the assistance programme. Although Portugal was not the only country audited by the Troika, we have chosen the case due to its special characteristics. The Portuguese government had to cope not only with the increasing resistance of the population, but also with the Constitutional Court as a veto player during these three years invalidating some of the policy proposals (Baraggia, 2015; Magone, 2014; Moury and Standring, 2017). Yet Portugal was considered 'the Troika's good pupil', who implemented the required policies with the minimum of fuss and delay (Magone, 2014, p. 353).

We will demonstrate the alternating use of rhetorical tools by focusing on two types of communicative environments: parliamentary debates and media reports. We gathered the parliamentary debates on the *Lei do Orçamento do Estado* (State Budget Bill) at the time of the Troika intervention in Portugal – namely from June 2011 until May 2014. For this study we analysed 13 floor debates. We also gathered direct reports of speeches of politicians in the media during the Troika intervention in two generalist quality daily newspapers: *Público, Diário de Notícias* and one quality daily economics newspaper: *Jornal de Negócios*. We searched for items directly reporting politicians' speeches to make sure that these were explicit political talks, analysing 54 items in total. All the documents analysed are public and easy to access through the parliamentary online data archive and the newspapers' online archives. Although the discourses were from the same speakers (the national politicians in charge) in the same anomalous situation (intervention by the Troika), these data sets represent two communicative environments in which activity orientation and the constellation of participants differ from each other: while in parliamentary debates the aim is to debate and discuss the national policies among peer politicians, in political reports and press conferences the goal is to explain the decisions and national policies to the general public. Moreover, these two environments represent two different institutional systems within democracy.

The analysis proceeded in three stages. In the **first stage**, both data sets were scrutinized by applying tools from discourse analysis (DA) (Fairclough, 2003; Wood and Kroger, 2000) conversation analysis (Sacks, et al., 1978) and research on institutional interaction (Drew and

Heritage, 1992). In this study DA was understood and used as an empirical method to analyse how through language people give meanings to certain affairs, and how some discourses gain acceptance as a way to construct political arguments. We used DA to place special emphasis on the persuasive and rhetorical aspects of the discourses (Potter, 1996) explicating the ways in which the discourses are produced in order to be persuasive (Billing, 1996). Discourses were approached in their interactional setting, in which actors perform institutional actions and talk institutions into being (Heritage and Clayman, 2010). Thus, besides discursive formulations, we paid attention to the communicative purposes of the talk. To facilitate our analysis, we used ATLAS.ti to organize and code the data.

In our analysis we coded three aspects: 1) the communicative area in which the statement was made: in parliament or in public accounts in the media; 2) the role of the politician making the statement, focusing the attention on the government actors; 3) the justifications and arguments put forward in their statements. In analysing the justifications, we paid attention to the various discursive strategies politicians used to construct their arguments and to what purpose. Here the interest was not to test any pre-established categorization, but rather to inductively identify different ways by which the obligations are presented and justified in the national discussion. Following another principle in qualitative research, the aim was to create a categorization that applies to all types of justifications (Alasuutari, Bickman, & Brannen, 2008), but without being mutually exclusive, as a statement may include several parallel typologies. In the **second stage**, we proceeded to identify several key terms and expressions that were broadly related to the different rhetorical strategies identified. After identifying the terms and expressions, we proceeded (**third stage)** to evaluate their frequency of occurrence[1] and their interrelation with the communicative arena. The purpose of this stage was to compare both corpora and to show the distribution of rhetorical strategies therein. Although following the logic of action within the political field, the opposition influence politics by rebutting the government's arguments, and at the same time, their discourses and criticisms need to be taken into account by the government; in the national sphere the government in office is the one in defence of policies, with ultimate political control and responsibility. Therefore, in this paper we only analyse and present the results on the government actors to build our argument.

[1] Although the frequency of occurrence was done by keyword searches, not all the words and expressions were always counted. Rather, we made sure that the term or expression appeared as part of a justification; in that sense, we have excluded from the analysis the statements where certain terms appeared in contexts where the purpose was different (i.e. the term 'emergency' as part of the 'programme of social emergency', or the term 'constraints' as part of the 'I will deliver my statement fast because of time constraints' etc.).

Political Justifications of Coercion

In this empirical section we analyse the various discourses and justifications employed by government actors. Although previous research has demonstrated how coercion tends to give rise to the tactics of depoliticization in political discourse, our analysis reveals that the responses to the coercive context by government actors were manifold and strategic in terms of building legitimacy. Our findings suggest that we can distinguish two types of justifications in regard to coercion: depoliticization, and relativization, both of them characterized by a series of discourses, terms and rhetorical expressions (see Tables 1 and 2).

Tables 1 and 2: Justification of coercion in the political discourses

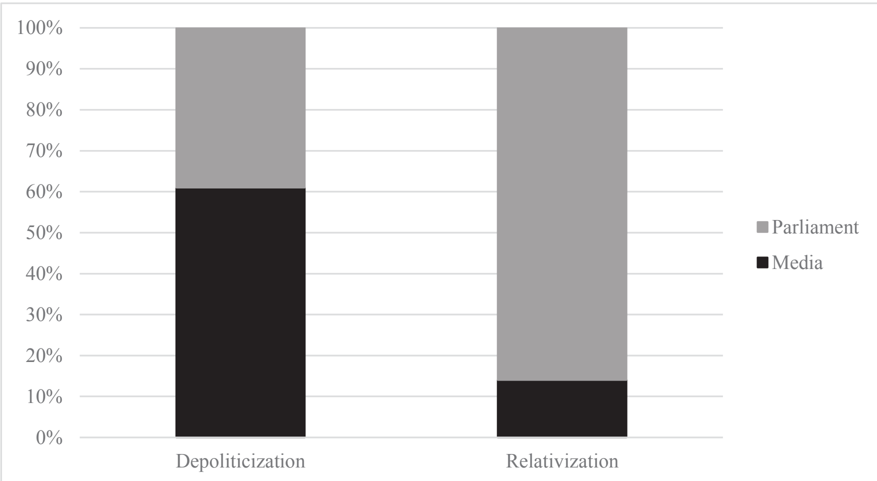
Depoliticizing discourses	**Main terms and expressions**
Discourse of external constraints ***Discourse of political reluctance*** ***Discourse of negative consequences*** ***Discourse of exceptional circumstances***	***no alternative, state of exception/ emergency, exceptionality, complexity, extreme, controversial, conditioned, gravity, hard, difficult/ difficulty, not easy, constraint(s)/limits/limitations, serious/seriousness, no choice(s), no option(s), sacrifices, no wish/unwillingness, inevitable, no room to maneuver, incapacity, obligation(s), worse, hard, unpopular***

Relativization of intervention by Troika	**Main terms and expressions**
Discourse of national improvement ***Discourse of national responsibility*** ***Discourse of national choice*** ***Discourse of national guilt***	***bearing fruit, positive evaluation, recover, overcome, successful, improve/improvement, progress, prosper/prosperity, sovereignty/ sovereign, autonomy, independence, credibility, reputation, responsibility, responsiveness, the public interest, national interest, determination, confidence, there are alternatives, room to maneuver, control, choice(s), option(s), appropriateness/appropriate, solution(s), capacity/ability/capability, capable/able, fault, blame, irresponsible/irresponsibility past, previous/previously, precedent, former government(s), legacy, guilt/guilty, inheritance***

These forms of justification are not mutually exclusive. Rather, they are analytic categories set apart by the main emphasis of the utterance and they tend to co-occur in political talk. However as Figure

1 shows, these two types of justifications were not equally frequently present in the communicative environments. While the majority of the justifications of relativization appeared more prominently in the parliamentary debates (86%), the justifications of depoliticization were recurrent in the media (61%) (see Figure 1).

Figure 1: Frequency of the strategies of depoliticization and relativization by communicative arena



Hence, we argue, that in the two arenas the communicative uses and purposes of justifications are not the same. Next, we explain and illustrate both strategies by analysing how and when the justifications are deployed.

Depoliticizing Discourses

In a context of economic intervention such as the case studied here, there were undeniably constraints in the political domain. The government could invoke the Troika and its ideas when the opposition challenged the political programme (Standring, 2018) or even to implement changes that they wanted to accomplish (see Moury and Standring, 2017). There are many discursive tactics to address depoliticization, probably the best known being the slogan ‘there is no alternative’ (TINA), in which the politicians allude to their incapacity to act differently (Watson and Hay, 2003). Others include the explicit invocation of constraints, necessity, inevitably or irrefutability (Séville, 2017).

In this section, we study how and when government actors employ tactics of depoliticization. In the analysis we noticed that depoliticized discourses did indeed gain acceptance as a way to construct political arguments during the intervention by the Troika. This way politicians seemed to domesticate the obligations and incorporated them into daily discourses making them seem part of the natural ways to discuss and approach the intervention. However, we found that these ploys were more frequent in political reports when government actors explained and justified political decisions in the media than they were in the parliamentary debates. It was in these contexts that they were inclined to publicly abandon or mitigate their responsibility (Avigur-Eshel, 2018). The government politicians constructed a discourse depicting that they were under duress, that they had no alternative and that these policies were inevitable in their efforts to justify the unpopular austerity measures. They employed them to convince the general public of the prevailing dire circumstances, insisting that these measures were the right ones in this situation. As stated, the procedural legitimacy of representative democracy derives from popular sovereignty, that is, from sufficient inclusion of citizens in decision-making practices through public discussion (Habermas, 1996, pp. 315-316). The discursive tactics of depoliticization can be used 'as a means of insulating oneself from public criticism in moments of reforms, revisions or potential policy change'(Séville, 2017, p. 464).

In our analysis we identified four different discourses of depoliticization in the arguments. Of these four discourses, the first one can be called the discourse of external constraints, within which actors justify and emphasise the absence of alternative. The second is the discourse of political reluctance. In this discourse, actors emphasise the unpopularity and drawbacks of the measures, arguing that it is not what they would have wished. The third is the discourse of negative consequences. In this discourse, actors want to demonstrate the importance of complying with the Troika mandate as the consequences of not doing so could be worse. The fourth can be called the discourse of exceptional circumstances. Within it, actors argue that they are in an unusual situation requiring urgent and rigorous measures. Although these four analytical categories represent different rhetorical strategies, they all present similar nuances and ideas that are intertwined: they emphasize the anomaly of the situation and the political impossibility of going in another direction.

Discourse of External Constraints

The quotes below show politicians stating clearly that they have no alternative but to comply with the Troika requirements. The first quote is from the beginning of the intervention, in autumn 2011, at the very moment when government politicians most needed to justify the intervention and the importance of applying the measures stipulated in the MoU. The quote below shows how Passos Coelho (PSD), the Prime Minister at the time of the Troika intervention recognized publicly the harsh measures of the government and explained and justified them by claiming that they were the only possible solution as the government was limited to the bailout agreement.

The ‘measures of a horizontal nature’ applied to State workers and pensioners, in particular the suspension of holiday and Christmas allowances, ‘are **extremely** harsh’, but ‘**there is no alternative** to this path’, said Prime Minister (Passos Coelho) on Tuesday during the final words of a conference of Diário Económico dedicated to the challenges of the State Budget for the coming year. As for the discussion of the State Budget proposal for the upcoming year, Passos Coelho stresses that, as regards ‘fundamental issues’ and ‘more **controversial** measures’, there is ‘**no room** to negotiate’ with the Socialist Party, as the ‘basic policies are **conditioned** by the financial rescue package established with the International Monetary Fund and the European Union’ (Diário de Notícias, 25 October 2011).

Interestingly, not all these justifications of the measures were from the beginning of the intervention. They persisted as a recurring argument throughout the Troika period.

Deputy Under-Secretary of State, Carlos Moedas, insisted this Friday that ‘**there are no viable alternatives**’ to the Portuguese adjustment, which have to be ‘followed’ to be able to resume a ‘balanced’ financial situation. According to the official, ‘we are living in **difficult times**’ and ‘we are all aware that the process entails **sacrifices** and uncertainties, but it has to be followed by Portugal in order to return to a certain economic balance’ (Público, 9 November 2012).

For instance, in the quote above from 2013, a PSD politician maintained that although Portugal was facing difficult times, the adjustments and sacrifices were the only possible way to overcome the crisis.

Discourse of Political Reluctance

This notion of having no choice could also be emphasized with the idea of seeking a different solution or by stating categorically that if there were room to manoeuvre the decisions would be different. In that sense, it was a shared discourse to go a step beyond the argument of ‘no alternative’ and demonstrate that their political wishes were not these. The quote below shows how the Prime Minister justified the measures decided on by acknowledging their roughness and claiming that they were not their political aspiration but that they had no other option.

‘We have nothing against civil servants, but the State does not have the money to sustain the wage bill that we have with the civil servants,’ said Prime Minister Passos Coelho this afternoon, when confronted by journalists with the strike scenario in the civil service and with the accusations that it is backing down on a promise made in the electoral campaign of not

> dismissing civil servants. The Government seeks an 'agreement as broad as possible' and acknowledges that the current situation is '**difficult** for unions and workers'. We are 'working on the situation', but 'we do not have a magic wand to say that the problems will be solved miraculously'. (Jornal de Negócios, 30 May 2013).

The idea of emphasizing the unwillingness of these policies appears in the parliamentary debates intertwined with some other ideas and justifications, although they are not as direct as in the media.

> It is in this context that we arrive at the decision, which is **hard** and **unpopular** but **inevitable**, and taken with courage and determination, of suspending Christmas subsidies and paid holidays for public officials, pensioners and the state business sector, for salaries above 1000 € per month, and to reduce, on average, one of these subsidies between the minimum wage and that value. This is for the duration of the adjustment programme.
> It is, of course, the measure that characterises this State Budget, although it is not un**precedented** in Portugal. In fact, already in the Budget for 2011, when the Socialist Party was in power, the salary costs of the public sector and the state business sector were cut (PSD, Parliament of Portugal, 11 November 2011, p. 36).

The example shows how a Member of the Parliament (MP) of the governing party highlights the idea that the political and economic context was the cause of the hard decision. Yet, while conceding the unpopularity of the measure, the speaker also goes a step further in the argumentation by claiming that the previous government did something similar, thereby demonstrating that the measure is not unprecedented.

Discourse of Negative Consequences

Another recurrent strategy of depoliticization in the political discourses was to rationalize the obligations by presenting the necessity to comply with them. In this case, the idea was to scare the audience by announcing that the consequences of not following the path would be worse.

> 'If Portugal does not comply with the programme, **the alternative will be worse**,' says Marques Guedes (Público, 7 November 2013).

The extract illustrates how a government spokesman (PSD) uses this strategy to warn the general public of the importance of compliance to overcome the intervention and to justify the decisions taken as appropriate in the situation. By stressing the negative effects of not obeying the MoU, government politicians reinforced the idea of there being no alternatives.

Discourse of Exceptional Circumstances

Moreover, alluding to the exceptional times that the state was facing and the exceptional measures required was another shared and used discourse occurring for the entire duration of the intervention. By considering this situation as an anomaly the speakers constructed a scenario out of the national perspective, with no other options than to meet the international requirements.

> The first vice-president of the PSD (Jorge Moreira da Silva) stressed that this moment requires us to fulfil the **obligations** assumed with the international creditors and to do what has to be done and not what would be 'easier' (Jornal de Negócios, 5 October 2012).

In this case a government actor (PSD) argues that the exceptional situation that Portugal was facing demanded compliance with the Troika.

Relativization of the Troika's Intervention

Although one might assume that national decision-makers must adhere to the bailout agreement with virtually no opposition or consideration, the national parliaments nevertheless have the legal authority to approve or reject bills. Whereas the discourses of depoliticization were commonly employed in the media reports, in parliamentary debates the predominant strategy was to show that the local actors did indeed play a role and exert influence in the political processes. Therefore, MPs of the governing party discussed and justified their views by appealing to powerful ideas in order to persuade other politicians regarding the situation and the appropriate course to take (Alasuutari, 2016, pp. 113-114). They did not directly promote what was said and agreed in the MoU or justify the absence of political options as was often the case in the public discourses in the media, rather they used and incorporated the Troika intervention as part of the ongoing political discussion to further their own arguments and objectives. In that sense, while government actors might be in favour or against the Troika proposals, or even pressured to incorporate them, they converted the Troika demands into justifications for their own purposes, while trying to convince other politicians to gain maximum support for their views. In this discursive arena the arguments are not as black and white as they tended to be when explaining the decisions and the reasons for them in the media. MPs of the governing party endeavoured rather to relativize the Troika intervention to construct convincing discourses and arguments for the other MPs or at least less easily refutable claims. In that sense, the government politicians employ strategies of relativization to show their capabilities to their fellows and their credibility to work for the national interest.

In our analysis we identified four different ways of relativizing the Troika and the MoU in the arguments. Of these four discourses, the first can be called the discourse of national improvement. Here actors proclaim how the nation's performance has improved through the Troika bail-out. The second is the discourse of national responsibility. In this discourse, actors argue how, despite being bailed out they are acting in favour of the nation and its interests. The third is the discourse of national choice. In this discourse, actors want to demonstrate how they still have room to manoeuvre, to choose and make decisions. The fourth can be called the discourse of national guilt. Here actors argue that this situation is not attributable to the Troika. Although these discourses are much more frequent in the parliamentary debates, we also found some traces of them in the media texts. Even though these four analytical categories represent different rhetorical strategies, they display a similar correlation: they stress the capacity of action of the national government and how this is always exerted to benefit the nation.

Discourse of National Improvement

One way to relativize the international intervention was to show the positive side – that is that in this situation the nation progressed. Many MPs from the government party, substantiated their arguments by saying that the Troika evaluations were positive, proposing to continue along the same line. MPs wanted to emphasise that their political actions in this international intervention were bearing fruit, and despite being in a hard or unpleasant situation, they could be proud of how they were progressing. As seen in the quote below, an MP from the government party is arguing for the importance of highlighting the great job that all the Portuguese and the government were doing to fulfil the international commitments. In that sense showing the importance of continuing on the same track.

> All the **evaluations** made by the Troika are positive and this is the work of this Government and of all the Portuguese (PSD, Parliament of Portugal, 30 October 2012, p. 29).

The main purpose in adhering to the Troika guidelines was to overcome this situation as soon as possible and to start again with full sovereignty. In this case, MPs were not asking how they had arrived at the actual situation, rather they stressed that the main thing was to cope with it. This discourse gained importance throughout the period as a way to demonstrate that this intervention would not last forever and that the best way to start again with normal political control would be to fulfil the terms of the MoU. Furthermore, apart from re-establishing full control of the economy, actors also emphasised that the ultimate goal was to restore the image, credibility and reputation of the nation.

> We will contribute to the reduction of the financing costs of the Portuguese State and the Portuguese economy in the future; we will be releasing resources that are now consumed by servicing debts. Next year, we will exceed 8,000 million euro; we will honour our **sovereign** signature; we will be making a very valuable contribution to the advancement of the European project; we will be demonstrating the **responsiveness** of our democracy and our institutions even in the face of such **serious emergencies** as this. It is a **difficult task**, but it is also a noble task and with very clear rewards (PSD, Parliament of Portugal, 11 November 2011, p. 62).

The excerpt illustrates how an actor argues and stresses the importance of continuing along this line of compliance. In that sense, going along with the Troika is the means to achieve and regain the reputation, which is in the public interest.

Discourse of National Responsibility

Another way of relativizing the Troika's intervention was to emphasise the legitimacy of the parliament and the importance of governing for the nation and its citizens as a national responsibility. In this case, MPs wanted to make it entirely clear that they do not take political decisions thinking of the Troika and pleasing it; actors rather justified their decisions by claiming to be thinking of the nation.

> We think of the Portuguese people, not the Troika so, after this stage, and having **successfully** completed the necessary adjustments, we can definitely open a horizon of hope for all. It is to think of all the Portuguese who are in difficulties, not in the name of the Troika, nor of any ideological dictates, ... (Prime Minister- Passos Coelho (PSD), Parliament of Portugal, 30 October 2012, p. 9).

As the quote above shows, this talk was prevalent in the government's interventions as a way to justify their measures and actions, which were always intended to benefit the nation.

Discourse of National Choice

In some other cases actors evoked the Troika to show that they were not powerless in this situation and that they had room to manoeuvre to pursue political ends. In other instances, MPs emphasised that they were pursuing the policies that they considered to be in the nation's best interests.

> Do you know why? Because this did not seem possible, nor socially acceptable. This is precisely why we opposed the Troika in this matter and, in that sense, we have found a **solution** that is, from the social point of view, more defensible (PSD, Parliament of Portugal, 26 October 2012, p. 12).

Some of these could be policies not included in the MoU or even policies that were contrary to what the Troika was saying. In that sense they relativize the impact of the Troika by saying that they are actual political agents, as seen in the quote above.

Discourse of National Guilt

Finally, another discourse in which actors relativized the Troika was to demonstrate how the fault is not with the Troika, but rather with the nation. In these discourses, government politicians actually acknowledged their critical situation by discussing how they had arrived at that point. In the parliamentary discussion it is hardly usual to blame the IO (cf. Schmidt, 2007; Traber, et al., 2016). Instead, an acceptable discourse to construct arguments is to allocate the blame to other national actors or even the past, as seen in this example from the government:

> We have heard Mr. Silva Pereira say that the Portuguese do not forget, I would like to say to the former Minister that I believe that the Portuguese do not forget. The Portuguese do not forget that it is the biggest failure that a government can have, which is to put Portugal to the humiliation of having to negotiate with international creditors to decide what their deficit and budget is, because it ceased to be **sovereign**, to have **independence** to finance itself in international markets (CDS-PP, Parliament of Portugal, 25 October 2013, p. 44).

Blaming the past or the former government may also occur as a discursive strategy in the media. The extract below illustrates how the Prime Minister acknowledges his responsibility in the harsh measures but stresses that he would have not imposed them without the legacy of the past government, which actually requested the bail-out. Therefore, here again the actors were stressing the role of the government actors as true agents.

> Passos assumes violence of austerity but blames the socialist **inheritance**: 'The measures are mine, but the deficit that compels them is not mine' (Público, 15 October 2011).

To conclude, our empirical analysis shows that when there is a coercive setting a strategic choice is made as to how to argue and justify the policies. We found two varieties in the data: depoliticization and relativization. Government politicians domesticated the Troika's intervention differently in different communicative environments, which goes to show that the same institutional actors deploy diverse discursive strategies in persuading the audience in these arenas. On the one hand, they relativized and mitigated the Troika and its ideas to influence other politicians in the field of national policy-making. We suggest that in parliamentary debates it is not so common to find depoliticized discourses in which actors try to limit the reasoning and impose imperative ideas, because these are rather weak. Depoliticized discourses suggest powerlessness in political deliberation and can easily be contested. Instead, politicians must build well-justified arguments that can convince their peers about the best options. In that sense, government politicians use their capabilities and agency to balance the threat and work for the nation, suggesting ideas that can be in concord with the national trajectory. On the other hand they evoked the tactics of depoliticization as a way to evade responsibility and defend themselves against public criticism for what could be considered unpopular policies.

Conclusions and Discussion

In this paper we set out to examine how government actors of a nation-state cope with coercion exerted on them by an external source and how they evolve justifications and persuasive arguments when debating and reporting new policies in a setting that threatens to compromise national sovereignty and integrity. We studied the case of intervention by the Troika in Portugal (June 2011-May 2014) by analysing two datasets: parliamentary debates on State Budget bills to study the discourses used in political deliberation, and direct reports of speeches of politicians in the media to study the discourses employed when communicating and explaining the situation and the new policies to the general audience.

The analysis shows that depoliticization is not the only strategy activated by coercion. Politicians operate on morality, anticipate the expectations of the audiences and accordingly assign themselves the appropriate roles and responsibilities in an interactive setting (see Rautajoki, 2012). Our study reveals that coercion was handled differently by the same speakers depending on the communicative environment through adopting different discursive strategies: depoliticization and relativization. The discourse of depoliticization was very prominent in the public arena, whereas the argumentation in the parliamentary debates underlined the aspect of agency and capability – that is mitigating and relativizing the force of the Troika and its intervention in the state by expounding national improvement, national responsibility, national choice and national guilt. We argue that the reason for the variation in the strategies used in different arenas was that the persuasion was designed for different publics and for different purposes with different principles of legitimate action. In the parliamentary debates the strategy was not to limit the political contestation, but rather to work on the best arguments to persuade the other politicians towards agreement and influence the political deliberation. By contrast, in the public arena, when explaining the policies and decisions of the parliament to the general audience, the strategy employed was to highlight the exceptional nature of this situation and the lack of political options, which serves to uphold the trustworthiness of the representatives in the eyes of the public by removing the political character in these difficult circumstances from the government to lay it at the door of the international creditors. Both strategies safeguard the integrity of the nation, only in diverse discursive arenas the actors choose different strategies to portray rationality and responsibility (Alasuutari, Rautajoki, Auvinen, & Rautalin, 2018). Government politicians achieved this, firstly by highlighting the remaining power and agency in front of other politicians, and secondly, by emphasizing the imperative to execute the Troika mandate in order to overcome the crisis for the citizens.

Our analysis indicates that government politicians actually downplayed the power of the Troika when debating the policies and manifesting their own political capability and agency in the process (cf. Borriello, 2017). Research on national politicians making use of the IOs' recommendations on a voluntary basis have demonstrated that politicians may deploy the rhetoric of coercion to strengthen their arguments and to influence domestic policy-making by giving the impression that they are forced to proceed with certain exogenous ideas (see Alasuutari, 2016; Alasuutari, Rautalin, & Syväterä, 2016; Rautalin, Alasuutari, & Vento, 2018). It has also been stated that the use of coercion as a rhetorical tool in political deliberation tends to vary: in situations where politicians are in fact subject to coercive power they avoid mentioning it and frame the ideas imposed as part of their own interest, whereas in other circumstances, without implicit pressure, they may construct coercion as a rhetorical tool (see also Alasuutari, 2016).

Furthermore, our study contributes to the theoretical understanding of political persuasion by illustrating how domestication is a procedural as well as an institutional tactic in legitimation. It makes the outer ideas 'ours' but they have to accomplish this task on different battlefields with diverse compositions of relevant participants. In this vein we argue that government politicians use different rhetorical tools to persuade and convince different recipients and to salvage their legitimacy within each framework. Government actors need to demonstrate responsibility to attain institutional legitimacy– that is, they need to be scaling the normative expectations within each arena. As we have demonstrated in our paper, it is not the same thing to address the media public, the citizens on whom the policies will have an effect, as it is to address discourses to fellow politicians. Neither is the communicative context in which the discourse takes place the same: the discourses produced to debate and decide the policies are different from the discourses produced to explain and report the decisions already taken. Hence there are different kinds of arenas of responsibility and accountability the governing politicians must handle in a coercive setting (see also Rautajoki and Pi Ferrer, in process). The relational scaffolding of the arguments, that is, the logic of interrelations, activities, mutual rights and obligations is different in them, and these interrelations guide the discursive strategies actors choose to achieve legitimacy for their actions (Rautajoki, in process). We argue that epistemic governance and political persuasiveness are always relational: although the message may be the same, actors formulate it differently depending not only on the recipient but also on the institutional system in which the speech is produced.

Although our coding is reasonable with this data and for the purposes of this study, we assume that these discourses are not exclusive and we acknowledge that there may also be additional nuances and strategies at play in navigating coercion. However, our analysis does present a demonstrable variation in justifications within a single case study. Moreover, we would expect to find similar discursive mechanisms in other countries dealing with external coercion. In this respect, further research could be done to see, for instance, whether other bailout countries acknowledged to present more controversies in compliance with impositions present different rhetorical patterns. Future research could also broaden the perspective and explore how international actors are addressed in political talk on the Troika impositions. This paper has concentrated on the national level discussion in two political communication settings to evidence the deployment of legitimacy with discursive strategies beyond depoliticization.

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IV

Shadowboxing in silence: balancing with European Semester in national parliamentary debates on economic policies

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