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VALUES AND CRISES OF THE EUROPEAN UNION

Reflecting on the Narratives of Values and Crises in the State of the Union Addresses 2010 - 2020

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December 2020

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With the financial support of the European Parliament



EXECUTIVE SUMMARY

The Eurozone crisis, the migration crisis and now the COVID-19 crisis. The events of this decade have increasingly been referred to as crises – of political, social and economic nature. Simultaneously, the European Union defines itself as an embodiment of values – respect for human rights, human dignity, freedom, equality and democracy. Both values and crises are central concepts to the EUs identity formation, conceptualisation, and political agency and both are concepts that are embedded in significant ambiguity. This paper reflects on the nature of crisis and values narratives in the annual State of the European Union (SOTEU) Addresses between 2010 and 2020. The SOTEU Addresses are given by the President of the European Commission to the European Parliament, representing a critical moment for high-level agenda setting. All speeches use a crisis-based discourse to describe, persuade and present action and initiatives, with references to crises being used in almost all of the speeches opening lines. Values are referred to cross-cuttingly throughout all speeches, with democracy, rule of law and freedom featuring the most.

Short Bio

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ABBREVIATIONS

EU European Union

EC European Commission

EP European Parliament

SOTEU State of the Union/State of the European Union Address

TEU Treaty of the European Union

TFEU Treaty on the Functioning of the European Union



1 INTRODUCTION

At the turn of the decade, in 2010, the European Union was facing its most significant governance challenge yet. A pending Greek default in 2010 led to a continent-wide financial crisis of sovereign debt that threatened the foundations of the monetary union. Confidence in the Union's ability to respond effectively was being eroded and ongoing clashes and fallouts over monetary spending was highlighting the weaknesses across the board. Ten years later, it has become evident that the current world order and interconnected society is continuously rocked by exogenous and endogenous events which have to be responded to. The migration crisis, a steady rise in populist and right-wing narratives, Brexit and now COVID-19 are mere examples. Before these events in 2009, despite its relative recency, the Treaty of Lisbon (2007) was referred to as '*a pre-crisis treaty for a post-crisis world*' (Munchau, 2009), due to the functional governance structures of the EU not being adequately developed to respond to the events of the 21st century. Economic, social, and political crises, multi-dimensional in nature and practice, have all served to challenge existing decision-making structures, the integration of the Union and multiple pillars of its existence. Crises, or events dubbed as such, have highlighted existing fractures in governance and brought a new questionable emphasis on the idea of the European Union sharing common values.

The EU seeks to expand and exert influence through its application of soft power. A soft power, thoroughly embedded in what it terms as its fundamental values – human dignity and human rights, freedom, democracy, equality and the rule of law. However, as the events of the 21st decade have emphasised – these are not easy to administer nor assure. The terming of events as crises and the EU as embedded in values are demonstrative examples of how language is used to distil meaning and influence policy. Both crises and values are concepts that are embedded in language and discourse. This paper, therefore, seeks to explore and reflect on the annual State of the Union¹ Addresses (2010-2020) and the extent to which both concepts, values and crises, are used. The paper initiates with the conceptual framework, followed by a literature review and contextual setting of the two concepts. The methodology is then more thoroughly covered followed by the analysis, which is thematically presented.

2 CONCEPTUAL FRAMEWORK AND METHODOLOGICAL APPROACH

Crises can be seen as socially constructed through discourse and narrative (Manners & Rosamond, 2018; Hay, 1999 & 2012; De Rycker & Don, 2013) and embedded in socially constructed arenas in which more powerful actors are better able to impose their frames (Allwood, 2019). Crises and their understanding are therefore greatly shaped by who, and by what kind of narrative exists around it. Laurence (2014) highlights that one should consider understanding crisis not as facts but rather as events or circumstances which culminate as a result of prominent discourse and narration. High-level narratives significantly alter and shape the way crises are understood (Schmidt, 2014). In the same fashion, 'values' despite formalised in the law of the EU, their

¹ Also referred to as the State of the European Union to distinguish from the State of the Union speeches given in the USA and referred to under the acronym SOTEU.



ambiguous and ambidextrous nature means that the way they take form and what they mean can vary. Similarly, Wallaschek (2019), notes a changing shift in the way solidarity is discursively approached across the EU – arguing that its application has changed depending on context and crisis in question. The principal body of studies on discourse and the events of the last decade has been on how the media depicts, responds and describes events (Krzyzanowski, 2017, Fotopoulos & Kaimaklioti, 2016) which evidences a gap in knowledge on what Papadimitriou et al. (2018) calls 'elite discourse' or the discourse produced by EU policymakers themselves. This paper, therefore, seeks to contribute to this gap by examining the State of the Union Addresses. Analysing the type of language used serves to evidence, improve understanding, and contribute awareness to how the EU views and narrates itself.

3 CRISES AND VALUES AND THEIR RELEVANCE FOR EU POLICY

3.1 TRACING THE EVOLUTION OF VALUES

As outlined in the Treaty of Lisbon (2007), the EU is 'founded on the values of respect for human dignity, freedom, democracy, equality, the rule of law and respect for human rights' (EU, 2007, p. 13). Common values can also be considered as essential to the whole project of European integration. No nation or regional organisations so frequently refers to and relates its establishment to common values in the way that the EU does. It is imperative to note that whilst these 'values' are referred to as European, in practice, they are not necessarily distinctly European in that they do not distinguish the EU from the rest of the world (Onghena, 2015, Cremona, 2011), but have become interlinked with the EU through narratives. Discourse, narratives and collective histories have been instrumental in creating a values-based narrative for the EU.

Box 1: The Lisbon Treaty (2007)

The Lisbon Treaty (2007) is the latest amendment to the Treaty of the European Union (TEU) and the Treaty on the Functioning of the European Union (TFEU).

Article 1a: The Union is founded on the values of respect for human dignity, freedom, democracy, equality, the rule of law and respect for human rights, including the rights of persons belonging to minorities (p.13).

Article 2: The Union's aim is to promote peace, its values and the well-being of its peoples.

Article 2 (5): In its relations with the wider world, the Union shall uphold and promote its values and interests and contribute to the protection of its citizens (p. 13).

Values are presented as both a characteristic of the Union but also as critical processes by which objectives can be achieved (Evans & Koutrakos, 2011). Evans and Koutrakos (2011), further argue that the increasingly important role of human rights, rule of law and democracy in the Union's external policy has led to the Union shifting to define itself by its values both to its citizens and to the world. In this day, values therefore form a central part of EU's integration agenda, but also as a critical factor in the EU's external ambitions (Lucarelli & Manners, 2006).

As the basis of normative power, soft influence and global ambitions, the values of the EU are central to its political, institutional and identity conceptualisation (Nielsen, 2013, Manners, 2002). While the argument and discussion around the EU as a normative power predates it (Manners, 2002, 2009, Sjursen, 2006), the Treaty of Lisbon (2007) was fundamental in formalising and



confirming the EU's normative external policy ambitions. Article 3(5) outlines explicitly that 'in its relations with the wider world, the Union shall uphold and promote its value and interests' (EU, 2007, p. 13). Soft power or the idea that you can get what you want through attraction based on 'the same goals, values and visions' (Nielsen, 2013, p. 726) remains central to EU agency, and the EU prides 'itself as a global norm-setter, a champion of human rights, and a promoter of democracy' (Kugiel, 2017, p.59). A central factor of the values and norms encroached foreign policy lies in the appearance and the narratives of the EU as embedded in the values. It therefore implicitly relies on internal upholding of values, which is something that over the last decade has become increasingly questioned. There are some limitations and embedded hypocrisy in defining and aiming to achieve a values-based foreign policy (Kugiel, 2017, Muravska, 2015), as it arguably presupposes the upholding of them internally, which is not always the case.

3.2 CHALLENGES TO VALUES

It is clear that values – what they stand for and as outright concepts are not always achieved. Moments of crisis highlight the weak nature that they have as a form of governance – the European Union does not have the instruments or power to ensure their realisation. Political polarisation, economic challenges and fragmentation between member states have all served as moments during which there are apparent failures involved in upholding values. Mos (2020), recently argued that the EU is experiencing a 'crisis of values', noting how politicians and actors ambiguously use the values for their own political gain, most recently in Hungary. He identifies the unenforceability and the ambiguity of the values – freedom, democracy, human rights, human dignity and equality, as essentially undermining their capacity to act as a commonality between member states, actors and politicians.

Williams (2010) notes that despite the emphasis on the values, the institutional law of the EU remains incoherent and lacking in moral purpose. During moments of crisis and in particular during moments that include decisions on the EU's future, references to the common values become even more common, with further reference even being given to the 'historic responsibility' of the EU (Ciampi 2002 in Lucarelli, 2006). Since this publication at the early turn of the century, several academics have mused and evaluated the extent, the role and the conceptualisation of values and the extent to which the EU's use of them in external policy represents a paradigm shift.

3.3 CONCEPTUALISING AN EU CRISIS

Crises can generally be defined as 'a serious threat to the basic structures or the fundamental values and norms of a social system, which under time pressure and highly uncertain circumstances – necessitates making critical decisions' (Rosenthal, 't Hart & Charles, 1989 p. 10). Within the construction of nation states, crises 'are commonly defined as an urgent threat to core societal values' (Ekengren & Groenleer, 2006, p.4). However, the specific and unique structural organisation of the EU as an emerging polity and an international organisation, means that crises aren't conceptualised based on national territorial principles, but rather have taken on an extensive form, which can be exemplified with the way EU understanding of security ranges from economic challenges to food security. Crises, as such are situated across multiple domains and can take



multiple forms. Simply put, crises can be defined as a 'familiar, external, shock of precipitating events ... which shake the status quo' (Rhinard, 2019, p. 3).

Academically, literature in the field of crisis and governance has begun to focus on the idea of 'transboundary crises' (Ansell, Boin & Keller, 2010), which is a way of conceptualising events more accurately in regards to their complexity and pervasiveness across multiple domains (Boin, Rhinard, Ekengren, 2014 & Backman & Rhinard, 2017). The events of the last decade and the origin of the European Union as a response to a 'crisis event' in the form of war, means that the literature on the EU and its relationship with crises is extensive. The last decade has seen a myriad of literature, across various fields, attempt to unravel the causes of crises, their impact on the EU and the EU's role in them (Lawrence, 2013, van den Noord & Szekely, 2011).

In response to crises, whether symbolic, practical or rhetorical, the EU has adopted explicit crisis management strategies, new structures and *ad hoc* response mechanisms. Preparatory crisis management activities have come to form a central part of the EU's core functioning – with crisis management being mainstreamed across institutions. While crises that the EU experiences, particularly global ones, are often considered external to EU functioning, the origin of the crisis can still be debated. What becomes defined as 'crises' are essentially 'spillovers... triggered by crises of endogenous origin' (Scipioni, 2017, p. 1357). This perspective essentially highlights that crises are not externally created, but rather are a result of existing weaknesses or bring to light limitations of existing policy and functions, such as highlighted with the migration crisis of 2015 and what has been considered an outdated migration policy (Schmidt, 2016, Gozdziaik & Main, 2020, Scipioni, 2017).

Rhinard (2019) terms 'crisification' as the process by which 'changes to collective policymaking processes in the EU which emphasise: finding the next "urgent" event, prioritising speed in decision-making, ushering in new constellations of concerned actors, and emphasising new narratives of 'what matters' in European governance' (2019, p. 3). The occurrence of crises seems to have become normalised to the extent that they can be considered an integral part of the EU's functioning, which further then begs the question of what constitutes a crisis, who designates crises and what do they mean for EU governance.

4 METHODOLOGY AND SCOPE

This paper reflects, analyses, and synthesises the narratives as present in the annual State of the Union speeches that are delivered every year by the President of the European Commission (EC) to the European Parliament (EP). The Treaty of Lisbon (2007), instituted the Address with the objective of further improving interinstitutional engagement and transparency and was introduced as a clause in the first Framework Agreement on Relations between the European Parliament and the European Commission (2010). As evidenced in the following figure, the trajectory of addresses can also be broken up based upon who is leading the Commission at the time.

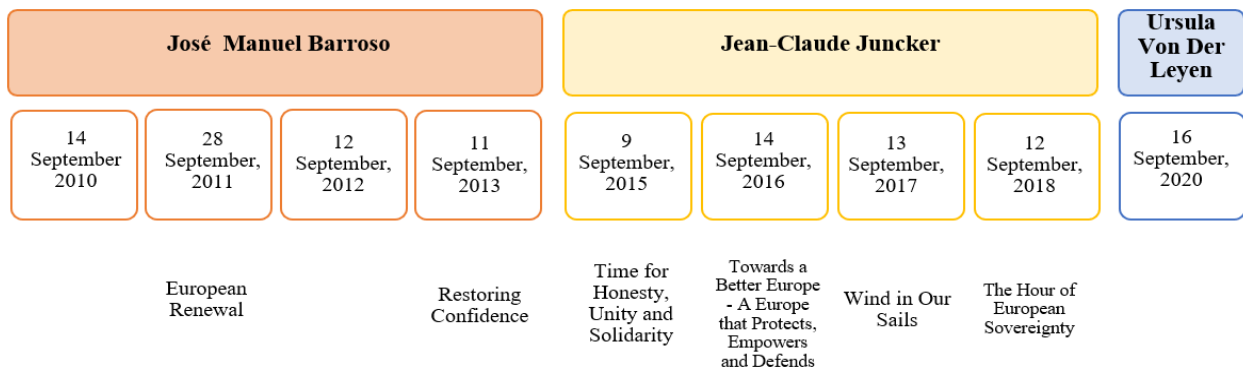


Figure 1: Overview of SOTEU Addresses 2010-2020. Source: Authors own.

The annual address consists of high-level discourse that seeks to capture the context, priorities and situations that the EU is in and is therefore optimal material for this reflection paper. Each Address has been systematically taken apart using a coding framework that identifies references to key concepts, with the aim of qualitatively unpacking the way in which matters are presented through the years. While coding serves to quantify language, it is necessary to note that quantified references are only used to give an indication of what concepts are the most prevalent and to provide comparative discussion. As such, methodologically, it still relies on qualitative methods due to the strengths it has in allowing for in-depth analysis, understanding and consideration of multiple perspectives (Lincoln & Guba, 1985, Denzin & Lincoln, 2011)). Doing so over time, also contributes to the understanding of the lateral expansion of EU agency – by investigating *how* narratives change, *what* is emphasised and to *what* purpose.

5 RESULTS AND DISCUSSION

5.1 WHAT IS CONSIDERED A CRISIS?

The speeches provide an informed overview of what has been on the European agenda over the last ten years. Thematically, the trend of SOTEU addresses is to initiate with an overview of the challenges, problems and issues that form the 'crises' that the EU must navigate through. Notable is that almost every Address, except for in 2015, refers to a crisis in the opening lines. In 2010, it is noted that 'the economic and financial crisis has put our Union before one of its greatest challenge ever' (2010, p. 2) and in 2011, it was further identified as being 'financial, economic and social' (p.2), but also as a 'crisis of confidence' in 'leaders' and 'in Europe itself (2011, p. 2). By 2013, the 'crisis of confidence' was still effervescently present. In Barroso's final SOTEU, utmost emphasis was placed on the financial crisis and the associated events, which had 'evolved into an unprecedented economic crisis. And it became a social crisis with dramatic consequences for many of our citizens' (Barroso, 2013, p. 2).

The terming of events as crises, reaches its peak in 2015, following which it relatively rapidly reduced, as summarised in the following table, in which the domain associated with its use is



highlighted.² The category of 'other' represents times when the term crisis is used but without direct link to a specific domain or a specific type that encompasses all domains (such as health in 2020)

Table 1: Overview of Crisis References in the SOTEU Addresses 2010-2020. Source: Authors own.

	Year	Domain of Crisis Reference				Total
		Economic	Political	Social	Other/general	
Barroso	2010	5	-	-	3	8
	2011	4	4	1	4	13
	2012	4	5	2	8	19
	2013	10	2	1	11	24
Juncker	2015	10	3	11	5	29
	2016	4	-	3	2	9
	2017	1	-	-	1	2
	2018	1	-	-	-	1
Von der Leyen	2020	1	-	1	6	8

In 2015, the term crisis was used 29 times, with the migration domain considered the most critical, as seen in the following quote:

'whatever work programmes or legislative agendas say: the first priority today is and must be addressing the refugee crisis' (Juncker, 2015, p. 6).

In 2016, crisis again formed the initial start of the speech with EU referred to as being 'at least in part, in existential crisis' (p.7). In 2017 and 2018, crises were referred to in retrospect, despite the ongoing social and political events at the time. Social and political events are commonly noted as 'challenges' to unity, values, and the common European project. Interestingly, the term crisis is only referred to twice – in reference to the crisis 'ten years ago' [2008 economic crisis] and then towards events in individual member states. Almost all speeches refer to the economic events of the last decade with crisis terminology, which was particularly the case in the earlier years due to the ongoing Eurozone 'crisis' and the secondary impacts of the 2008 recession. Barroso further acknowledged the way in which the economic events had dominated EU policy over the last years in his final SOTEU:

'It is only natural that, over the last few years, our efforts to overcome the economic crisis have overshadowed everything else' (Barroso, 2013, p.7)

As visualised in figure 2, the use of crisis language for economic considerations is common across all speeches.

²The domain of the reference is decided upon based on the wider sentence surrounding it.

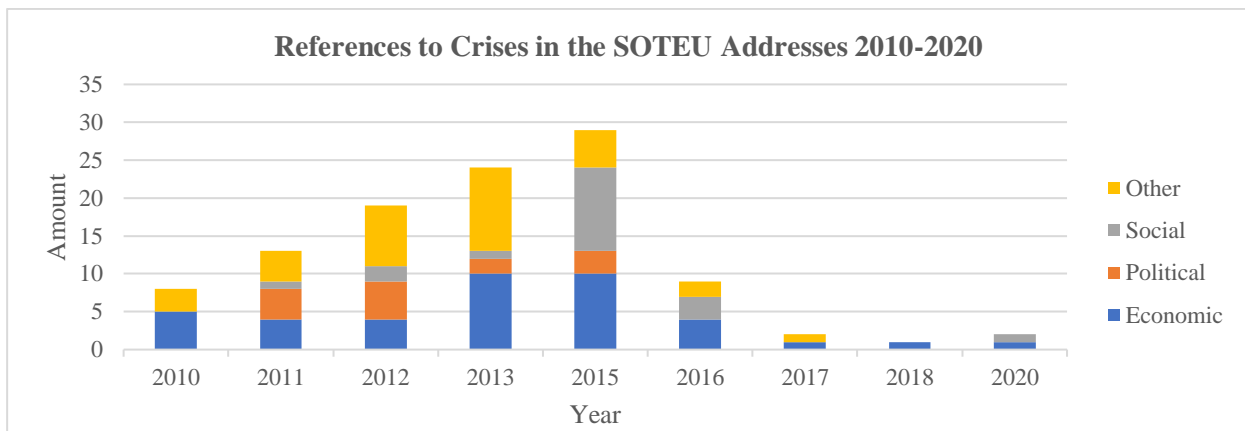


Figure 2: References to Crises in the SOTEU Addresses 2010-2020. Source: Authors own.

As such, the addresses, highlight the pervasive nature of economic events – and their ability to remain solidified in collective memory, with continuous references up until 2020. A significant portion of the SOTEU 2020 is concentrated on the COVID-19 pandemic. However, unlike the 2010 speech, which almost solely referred to the economic crisis at hand, the 2020 speech still includes events, priorities and aspirations beyond the COVID-19 led events. Furthermore, Von der Leyen uses and draws upon emotive language, choosing to highlight acts and evidence of citizenry, solidarity and common experiences, rather than outright references to events as crises, signifying a change to the earlier speeches at the start of the decade.

If one were to take the SOTEU speeches at face value for understanding the decade, it can conclusively be understood as a decade of ongoing crises. This corresponds to what academia have posited regarding the EU evolving to embrace itself as a crisis reactive actor (Rhinard, 2019, Ekengren & Groenleer, 2006). All speeches focus on crisis and use persuasive, emotive, and dramatic language to emphasise points and events. The first five Addresses emphasise and focus on the internal governance of the Union, which is referred to as being in 'existential crisis' (p.6). The terminology of crisis is used almost solely to describe the economic events, emphasising it as a singular, common crisis, shared by EU actors and member states.

5.2 A UNION FACED BY CRISES, BUT BASED ON VALUES

The Treaty of Lisbon (2007) formalised the EU's commitment and relationship with what has been deemed its 'foundational values'. Crises – economic, social and political all serve as moments that challenge and question the existing status quo. Despite the changing nature of the focus and the different nature of events over time, all Commission Presidents draw reference to the values as foundational principles, as seen in the following quotes:

'But our idea of Europe needs to go far beyond the economy. We are much more than a market. The European ideal touches the very foundations of European society. It is about values, and I underline this word: values.' (Barroso, 2013, p.7)

'For me, Europe is more than just a single market. More than money, more than a currency, more than the euro. It was always about values' (Juncker, 2017, p. 9).



'We must rebuild the trust amongst us and move forward together. It is anchored in our founding values, our democracies and in our community of law' (Von der Leyen, 2020, p. 21)

It is clear from the speeches that events over the last decade have served as challenges to the values' practical realisation. Internal events, political and social, may not be directly mentioned or outright condemned in the speeches, however from the above quotes it is also made clear that there are constantly events, circumstances and actions that seek to undermine the common values. The events that directly challenge the notion of European values – democracy, the rule of law and human rights – are complex in nature and may not have a direct solution which can be channelled through EU institutions, due to the distinct competency based divisions of EU governance. However, heavy emphasis throughout the speeches on this may reflect a growing emphasis on the necessity of the EU to respond, even if there may not be clear-cut paths to do so. The extent to which values are referred to varies from year to year, as evidenced in the following table.

Table 2: Overview of References to Values in the SOTEU Addresses 2010-2020. Source: Authors own.

	Year	Specific Value						Value (s)	Total
		Freedom (s)	Rule of Law	Equality	Human Rights	Democracy (ies)	Human Dignity		
Barroso	2010	4	-	-	2	-	-	3	9
	2011	4	-	-	-	3	-	4	11
	2012	4	3	2	3	11	1	12	31
	2013	-	3	1	-	2	-	7	13
Juncker	2015	1	2	-	-	3	1	2	9
	2016	1	3	-	1	4	1	8	18
	2017	9	7	4	-	11	-	5	36
	2018	1	4	-	-	3	-	4	12
Von Der Leyen	2020	5	5	2	2	3	-	15	32

While quantitative word counts or trends may not provide the necessary depth of analysis, they provide overviews of trends, or their lack of. Democracy is referred to most often. Juncker outlines three of the values as being unshakeable – 'freedom, equality and the rule of law (2017, p. 5) in his vision of a 'Union of Values' and these are also commonly used across the breadth of addresses, as visualised below.

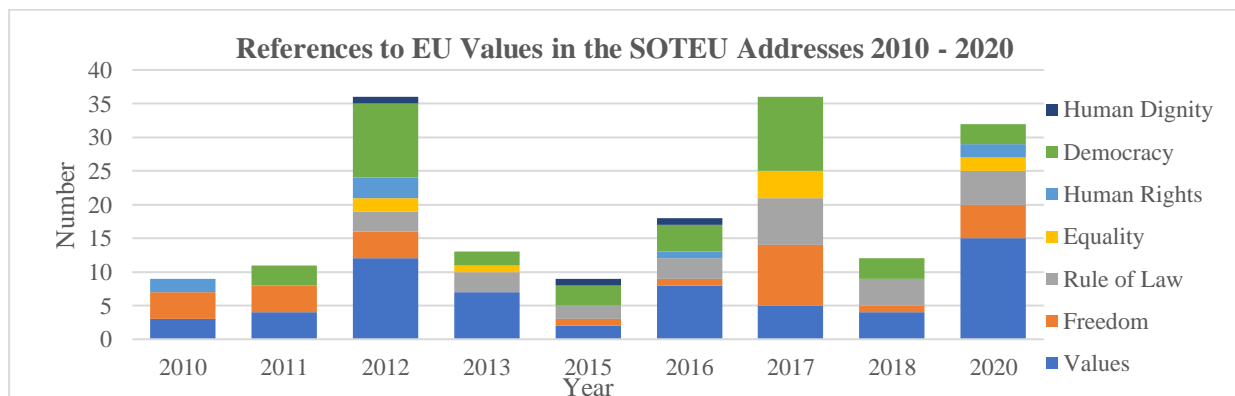


Figure 3: References to Values in the SOTEU Addresses 2010-2020. Source: Authors own.



The use of values-based narratives is not correlated with the crisis events, or the events that are being referred to in relation to crisis (Eurozone in early 2010, 2011 and migration in 2015 and 2016), but rather peaks in 2012 and 2017. Furthermore, the results show that conclusive remarks to be made on any causal relationships between crises and values narrative discussion. As seen in the following graph, there is no direct observable relationship between the two:

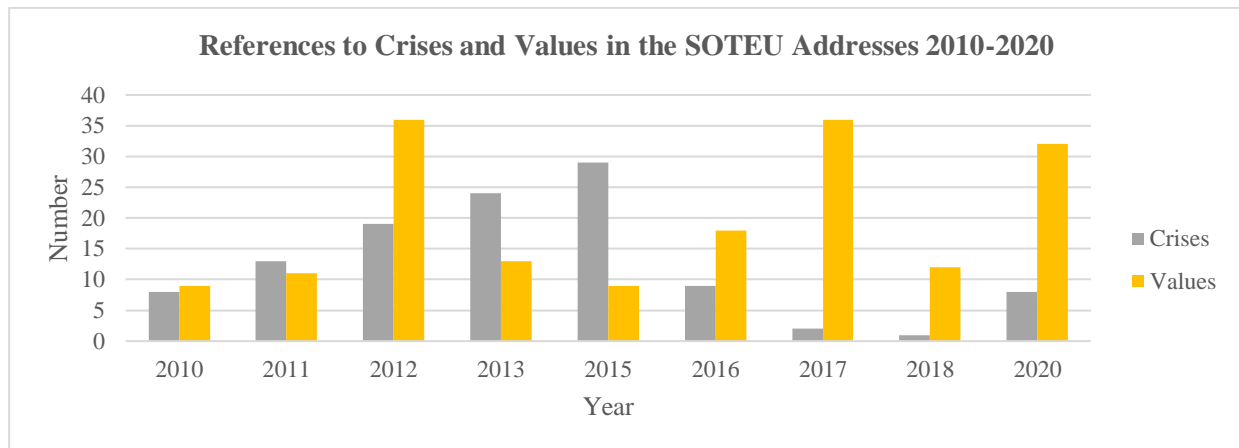


Figure 4: References to Crises and Values in SOTEU Addresses 2010-2020. Source: Authors own.

5.3 THE AMBIGUITY OF VALUES

The ambiguity of values – their variation in meaning, capacity and use is also something that can be seen in the SOTEUs. References to values occur through the lens of a vision of the future and the EU, a rationale, and as a historic founding principle, all used in various contexts and with various capacities. As seen earlier, the values are commonly referred to in their founding and central capacity, echoing what is outlined in the Lisbon Treaty, however, the way in which values are conceptualised extends beyond that of a founding value. External action is often motivated out of a values-based lens, which usually takes the form of a rationale, highlighting the way the EU seeks to define and promote itself as a soft power-based actor. Values are used as a rationale for specific events, often linked with concepts of responsibility, as seen in the following quotes:

'Being a global player also means standing up for our values. Human rights are not negotiable. ... Our values also mean that we must come to the aid of those facing a crisis situation, anywhere in the world' (Barroso, 2010, p. 9)

'It is precisely with our values that we address the unbearable situation in Syria' (Barroso, 2013, p. 9)

'We believe in the universal value of democracy and the rights of the individual. So we must call out human rights abuses whenever and wherever they occur – be it on Hong Kong or with the Uyghurs.' (Von der Leyen, 2020, p. 9)

All speeches touch upon global events, international relations, the role of the EU and also persuasively seeks to outline the role the EU *should* play externally. Whether values are truly what drives action is a much broader question than this paper seeks to consider, however it is essential to note the thematic importance values have in rationalising EU external action and security-motivated policy. Notably, the emphasis on external events is particularly present in the most



recent SOTEU speeches, and thus, a further point of study would be between the content of the speeches and external action.

6 CONCLUSION

Looking back at the events faced by the EU in the last decade and the policy responses, it is evident that the SOTEU acts as a major agenda-setting moment for the Commission. While causality between the speeches and action is not within the scope of this analysis, the analysis has highlighted what has been on the European political agenda over the last 10 years. It has evidenced the ambiguous nature of values and crises both as rhetorical tools and discursive concepts. Values and crises are both fluid in application, meaning and practice and are used discursively in varying capacity throughout the years. The results indicate an increase in values-based discourse, an emphasis of crisis discourse around economic events and no distinct relationship between crises and values narratives. The results show that democracy, the rule of law and freedom are used most cross-cuttingly throughout the speeches, with a particular emphasis being given to values in Juncker's 2017 speech in which the 'Union of Values' constituted its own section. Furthermore, several speeches evidence the immersive relationship values have with EU policy, agency and identity. As such, they serve as an essential persuasive linguistic tool for identity building, which arguably could be capitalised more on considering the lack of references to values in some of the speeches. Furthermore, the EU's conceptualisation as a project of peace must not be forgotten in its increased emphasis as an economic actor.

While the results of this analysis shows that there is no distinct relationship between the use of crisis and values in speeches, values as a concept are distinctly related to many of the EU's social crises, its history and current challenges. Arguably, there remains room to more deliberately act upon and embed policy in the values and what the EU as a whole stands for – something which the SOTEU are very well-placed to initiate. Values – in their various capacities, needs to be capacitated on as a linguistic tool and be placed high on the European agenda. The relationship between language and the policy-setting implications of the high-level discourse can serve to further promote commitment to foundational values in EU policy. Embracing and including more narratives that outline how the EU will respond to crises in ways that promote human rights, democracy and freedom, will not only serve to strengthen the European common identity but also the EU's ability to deliver on its promises, ideals and foundational goals. In a world that will continue to experience crises and collective challenges, emphasising the importance of values as core factors of agency, governance and integration becomes even more critical for such a multi-faceted institution as the EU. Upholding and remaining true to the values in the face of global and local challenges is the only way the EU will be able to remain relevant, authentic and trusted going forward. Respect for human dignity and human rights, democracy, freedom, equality and the rule of law must pave the way forward, in discourse, but more importantly in policy, legislation and global commitments. The ability to do so represents the real power and potential of the EU.



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