COMBINING THE ANTAGONISTIC:

A critical discourse analysis of the Lisbon Strategy

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ABSTRACT

In the light of the debate about the nature of the European Union, the current study proposes to look at how the EU is perceived by its policy-makers. The purpose of the study is to identify how the EU is understood in normative terms. Another aim of the study is to speculate as to why this kind of understanding is preferred in the documents. In order to achieve that, the study employs theoretical concepts within reference group theory and through means of critical discourse analysis, conducts an examination of the political documents from the launch of the Lisbon strategy and up to initiation of the Wim Kok report.

Through lenses of critical discourse analysis, the study arrives at a conclusion that two grand discourses are combined in the documents. The grand discourses of *the EU as a firm* and *the EU as Europa* are then discussed as to represent comparative and normative reference groups. Implications of the combination of these conflicting reference frames is then related to literature on the Lisbon strategy as well as to the purpose of the project called the EU.

Keywords: the Lisbon strategy, critical discourse analysis, comparative reference group, normative reference group, the European Union.

ACKNOWLEDGEMENTS

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1. INTRODUCTION

1.1 STATEMENT OF PURPOSE

In the eyes of Europe, we can be the model.

Maximilien De Robespierre[1]

European integration is often understood in economical terms. It is said that the European Union (the EU) is an instrument, created and used by its member-states in order to handle the challenges of globalization (Bressand & Nikolaidis 1990; Wallace 2005). While this perspective on the European integration might offer fruitful insights, it fails in explaining other aspects of a captivating project, called the EU.

The aspects that deviate from a merely economical objective are in one way or the other connected to social dimensions. The presence and choices behind relevant policy areas of the EU, such as social cohesion policy, environmental policy, asylum policy etc. is discussed in the literature of the integration theories in ways driven by design of dissimilar reference frames. These theories would consequently place the EU on opposite sides of a spectrum: from an international organization to a federation-in-making (Sweeney 2005).

An on-going discussion about the character of the European Union is a best testimony to its novice. To borrow a metaphor, *'the nature of the beast'*[2] is hard to describe. Nevertheless, it goes without saying that the EU is an active polity. It produces all kinds of norms to formulate its internal policies and to guide its behaviour on the international arena (Petiteville 2003). These norms are written down in policy documents and they are also carried out in international negotiations with significant others. The current paper intends to look at an example of written norms, namely the

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[1] Quotation from: Dainotto, Roberto M., 2007. *Europe (In Theory).* Durham and London: Duke University Press.

Lisbon strategy, as an illustration of '*who the EU really is*' in the eye of its key players. Two questions will be addressed in order to fulfil this objective:

      1. What is a normative construction of the EU in the Lisbon strategy?

      2. How can it be explained?

1.2 DISPOSITION

In this section I am presenting the disposition of the paper. My intention is to ally the disposition of the paper in accordance with the chosen method and the paper's overall ambition. This is also done in order to make the logic of argumentation presented in the paper as clear as possible as well as to enable a critical overlook. Transparency of every step of the research project is connected to the ethical foundations of social science research in general (Fossey et al. 2002).

      The present section is followed by a methodological discussion in *Method and Material* where a method of my choice, critical discourse analysis, is presented and its application is elaborated upon as well as a critical estimation of the empirical material is provided. Then I put forward a *Conceptual Framework* where I present a collection of interrelated concepts within reference group theory and establish a connection between the method and the chosen conceptual framework. At this point definitions of other concepts used in the paper as well as the limitations of the paper are identified in *Definitions and Limitations*. This is then followed by a chapter *The EU in the Lisbon Strategy* in which I begin by first identifying; secondly, discussing the identified discourses, and finally, proposing that the identified discourses can be seen as underlined by two grand discourses within the Lisbon strategy. The two grand discourses are then discussed in more detail in relation to the chosen conceptual framework in *Behind the Rhetoric* which is meant to reply to the second question of the essay. In *Discussion*, the findings of the study are discussed while relating them to the literature. Other reference material including a list of documents can be found in *Bibliography*.

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[2] Sidaway, James D., 2006. On the Nature of the Beast: Re-Charting Political Geographies of the

2. METHOD AND MATERIAL

In this chapter I present and discuss the method of my choice, critical discourse analysis. In other words, where I direct my attention while studying the Lisbon strategy and why my perception is filtered in a certain way, is being examined. The importance of a methodological discussion is connected to a centrality of a coherent line of argumentation in Political Science in general (Stoker 1995:7). Additionally, in the context of the chosen conceptual framework, the significance of a clarified understanding of what matters and why is evident since discourses are seen as all encompassing and thus inescapable (see *Conceptual Framework*). Hence, the ambition of this chapter, which is to enable a reader to both trace and critically evaluate the logic of the argumentation, is appropriate.

2.1 CRITICAL DISCOURSE ANALYSIS

Critical discourse analysis is a methodical instrument launched by Normal Fairclough in his *Language and Power* (1989) and *Critical Discourse Analysis* (1995). Fairclough sees the study of discourse as an interdisciplinary approach, where discourse defined as "*language as a form of social practice*" is central (Fairclough 1989: 20).

Putting it differently, critical discourse analysis is two-fold. On one hand, it studies communication by employing linguistic theory. Barbara Johnstone in the book *"Discourse Analysis"* comments on the relation between the critical discourse analysis and the linguistic theory in a following way: *"Every choice is strategic, in the sense that every utterance has an epistemological agenda, that is, a way of seeing the world that is favored via that choice and not via others"* (2007: 54). She means that linguistic choices about representation of actions, actors, and events; choices about the representation of knowledge status; choices of incorporating and representing other voices and choices about naming and wording are seen as strategic in a sense that they

are used to communicate ideologies. Thus, not only the way words are grammatically presented but also the choice behind these words such as usage of analogies and metaphors etc. are assumed to be designed to create *"identification"* with audiences by rhetorical means (Burke 1969).

Fairclough in *Languages and Power* refers to, among others, Michel Foucault (1980:15). He states that critical discourse analysis intends to examine ideologies and power relations that are involved in line with Foucault's ideas. Fairclough writes: "*language connects with the social through being the primary domain of ideology, and through being a site of, and a stake in, struggles for power*" (1980: 15). According to Fairclough critical discourse analysis is based on the notion of unequal access to linguistic and social resources. The central theme of the analysis is therefore to identify the patterns of access to discourse while the overall aim of the critical discourse analysis is to distinguish how social and political domination is reproduced by communication (Johnstone 2007: 54).

Another notion that is used by critical discourse analysis is the concept of *multivocality*. With multivocality Fairclough understands a phenomenon where different voices, in other words, different discursive logics come merged into a text (2003: 47). Louis Philips and Marianne Jörgensen in *Discourse Analysis as Theory and Method* continue this reasoning by formulating useful questions that can be asked while studying a given text: *"What characterized the different voices of the text? When does each voice speak? What meanings do the different voices contribute to producing?"* (2002: 73). Critical discourse analysis therefore states yet one more goal and that is to identify the *interdiscursivity* or with other words, a range of perspectives and representations and how they are combined in given texts (Philips & Jörgensen 2002: 149).

The purpose of my application of the critical discourse analysis is two-fold as well. I am to examine the Lisbon strategy not only as a text but also as a means of communication and a result of a socio-cultural, an ideological, practice. This means that the essay's questions in relation to the method translate into two tasks. The first task is to identify discourses by examining the choices behind grammar and words. The second task of the paper in relation to the chosen method is then to critically evaluate the identified discourses while speaking to the question of distribution of power.

2.2 APPLICATION OF THE METHOD

In line with critical theorists who reject the possibility of a value-free analysis and in order to address limitations of a text analysis such as an *"authoritative manner"* of the researcher, I need to examine in whatever degree possible the latent norms of my own that *"implicitly accept the prevailing order as its own framework"* (Platt 1981: 60). In order to achieve that I am offering the reader as much as possible of what led me to the topic, how the method was actually applied as well as expose the reasoning behind this application.

My initial interest was to study the Lisbon strategy in terms of political archaeology, a history of ideas. This came around as a result of a seminar where an article by Daniel Gros (2005) was discussed. The passage from the Presidency Conclusions of 23/24 March 2000 stating the goal for the EU to become the best knowledge-based economy was a leading theme for the article. Among other students, I was posed a question of what ideology the author stands for. This question was surprisingly hard to answer since through the article Gros showed a considerable degree of both neo-liberalism and corporatism. The only conclusion I could draw was that the point of the author's normative departure should have been the Lisbon strategy itself and that some sort of a combination of the two conflicting ideologies must have been present in the documents. This woke my curiosity since my interests in politics in general is to understand its claim to combine the antagonistic.

My curiosity grew when I, upon reading the documents, felt that they are formulated in order to communicate power as well as the ideas. I then proceeded by looking at the documents as a source of power structures, asking myself the following three questions: *first*; what is being communicated as important in the texts and how it is described (identifying discourses), *second*, why this is being communicated as important and why it is described in this way (identifying ideology), and, *thirdly*, what is a most reasonable explanation for the discourses (choosing and applying theoretical concepts). Distinguishing between the second and the third questions is relevant in the context of the present paper that is based on the assumption that perception and ideology are interrelated, in other words, connection between reference groups and ideology is tangible. Upon this exploration I presented the results of this study in way consistent with the essay's questions.

This kind of application of a scientific method can be characterized by both deductive and inductive logics. It is deductive because critical discourse analysis leads to a hypothesis that the chosen policy documents communicate and mirror power structures. It is inductive in such a way, that the speculation to what is communicated and why is aimed at finding a most reasonable explanation. The combination of the deductive and inductive logics in the study is done in order to tender a methodological solution of the limitations of the inductive argument described by Karl R. Popper in *The Logic of Scientific Discovery*: "*In short, like every other form of inductive logic, the logic of probable inference, or 'probability logic', leads either to an infinite regress, or to the doctrine of apriorism*" (1980: 30). The employed application of the scientific method allows me not only to assign a certain degree of probability to the statements but also to limit a number of probabilities in advance by referring to what is assumed to be true.

2.3 CHOICE OF THE EMPIRICAL MATERIAL

The choice of the Lisbon strategy as the empirical material for this study is based on the following two assumptions. On one hand, "*The Lisbon Strategy serves as a window for the understanding of this extremely complex and uniquely shaped European Model*" (Zhou 2007:359) thus is seen as characteristic of the ideological foundation of the EU. On the other hand, the study assumes that the Lisbon strategy formulates values that matter since the ambition behind it is strategic planning for the future.

While in the preparation-study a larger number of documents have been addressed[3], the present paper refers mainly to two documents: Presidency Conclusions dated 23/24 March 2000 and Presidency Conclusions dated 25/26 March 2004; that is

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[3] A full list of documents used in the preliminary study is provided for in *Bibliography.* Key documents on the Lisbon Strategy were derived from the European Commission's official website *"Growth and Jobs"* at ec.europa.eu/growthandjobs/key/index.en.htm and referred to the period between 2000 and 2004, dates of access 071028-071110.

from launch of the Lisbon strategy and up to initiating of the Kok report[4]. Other references include background documents that were involved in the decision-making process. These come from the Forward Studies Union that was appointed by the European Commission in 1998 in order to examine *"Globalization and Social Governance in Europe and in the US"*[5].

Due to significance of the Presidency Conclusions, references to these are preferred in the paper which in practical terms means that references to the background studies are made only if concurrent discourses are found in the Presidency Conclusions. The Presidency Conclusions are considered to highlight decisions of the European Council which comprises the heads of the states or governments. Presidency Conclusions can thus be seen as to draw concluding remarks to a dialog with a most important political body of the EU imbedded in the EU's institutional system. They are regarded as guiding documents for the overall development of the EU policies substantiating Jonas Tallberg's argument about the role of the European Council in the EU politics (Tallberg 2007).

The documents are treated in the study side by side rather than in comparison. That is done due to the study's ambition to identify an overall normative construction of the EU in the Lisbon strategy as an alternative to investigating specific policy field developments. A number of studies that choose to employ a developmental view validate such a treatment by saying that even after the re-launch it is the degree of integration of policy spheres rather than change of objectives[6] that has occurred, thus suggesting that: *"the direction of the Lisbon Strategy is more important than the quantative goals it has set to achieve"* (Zhou 2007: 365).

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[4]*Facing the challenge: the Lisbon strategy for growth and employment: report from the High Level Group chaired by Wim Kok,* 2004. Luxembourg: Office for Official Publications of the European Communities, 2004.

[5] Kenan, Patrick Jarboe, 1998. *Globalization: One World, Two Versions"* The Forward Studies Union, European Commission, Brussels, November 19; Sapir, André, 2003. *"An Agenda For a Growing Europe, Making the EU Economic System Deliver".* Brussels: European Commission.

[6] See for instance in relation to social policies: Dielkoff, Martina & Gallier, Duncan, 2007. The renewed Lisbon Strategy and social exclusion policy. *Industrial Relations Journal,* vol. 38, no. 6, pp. 480-502; in relation to economical policies: Begg, Iain, 2005. Do We Really Need a Lisbon Strategy? *Intereconomics*, Mar/Apr, vol. 40, no. 2, pp. 56-59.

3. CONCEPTUAL FRAMEWORK

In search for a most reasonable explanation for the second question in the paper, why this normative character of the EU is preferred, a sociological concept, '*reference groups'* came to my attention. This concept is central to the reference group theory and was first introduced by Herbert H. Hyman in 1942 in *The Psychology of Status*[7]. The choice of this conceptual framework is based on the notion that it captures: "*the way in which to define and interpret practices that appear to be both cognitive and normative within a social context* "(Dawson & Chatman 2001: 106). In this section I present and discuss some concepts within reference group theory and then relate them to critical discourse analysis. Establishing a relationship between the theoretical concepts and the chosen method is done in order to insure the coherency of the overall argument of the paper.

3.1 REFERENCE GROUPS

The basic assumption of the reference group theory is that human behaviour is influenced by the behaviour of other individuals or groups, in other words, people tend to adopt the standards of others they imagine '*significant'* as a basis for comparisons and, ultimately, choices. Thus reference group is a context for individuals to process information and make decisions. Individuals do not need to be a member of the reference group which influences their behaviour. The choice of the reference group is rather determined by socialization: individuals learn to compare themselves with groups of closer or distant association and groups of lower and higher social status (Dehley & Kohler 2006: 126- 127).

Reference groups can be distinguished as *normative* and *comparative* and people tend to use more than one group as a reference (Hyman 1969: 290-291). A normative

reference group represents a context or a group to which individuals are motivated to gain or maintain acceptance by means of conformity. A comparative reference group, on the other hand, stands for the context or a group which individuals use as a standard point of reference while making evaluations or comparisons of themselves and of other individuals or groups, in other words, as means to make judgement (Dawson & Chatman 2001: 108). Common to both types of reference groups is that they stand for single referents *"whose perspective is used as a frame of reference by the actor"* (Shibutani 1955: 562).

3.2 REFERENCE GROUPS AND DISCOURSES

This paper suggests that the concept of reference group can be operationalized through critical discourse analysis. Relationship between the concept of reference group and the concept of discourse can be understood as following. Reference groups are categorized as a set of established norms, which in turn constitute a pattern of belief and habitual action as well as patterns of language, or discourse (Foucault 1972). Thus, though identifying discourses, one comes closer to finding out what kinds of groups are used as reference. Distinguishable discourses are, according to this interpretation, symptomatic to the actor's identity alternatively to a process of identify formation of a given actor. This speculation is based on the idea that by defining reality, the actor communicates its views on both internal and external power structures (Berger & Luckmann 1966).

Foucault means that discourses are inescapable and all encompassing. Moreover, he argues that discourses are used as instruments in order to legitimize power by *"emphasizing current truths, how they are maintained and what power relations they carry with them"* (1972). In relation to the reference groups, the discourses should be assumed to legitimize power of both normative and comparative reference groups since the reference frame of those is used as a value based substitute.

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7 Hyman, Herbert H., 1942. The psychology of status. *Archives of Psychology*, vol. 269, pp. 5-91. Reprinted in: Hyman, Hyman & Singer, Eleanor, 1969. *Readings in reference group theory and research*. New York: Free Press, London: Collie-Macmillan Limited, pp. 147-165.

The notion of multivocality that critical discourse analysis employs is comparable to the notion of multiple reference groups. With this I mean that the concept of multiple reference groups offers a possible explanation to multivocality. While multivocality can as well be explained as a combination of discourses coming from different actors, another way of looking at it is to allow an assumption that is coherent with the notion of multiple reference groups: individuals tend to utilize several reference groups while constructing their reality. In relation to the current paper, this match implies that identifying dissimilar themes and representations in the texts, or what I in the paper call for *'grand discourses'*, would automatically bring the study closer to distinguishing different reference groups that steer actors perception. On the other hand, the paper claims that political institutions can be compared to individuals in such a way that they possess aggregate personality traits (Isaak 1985: 223-224).

Despite this connection between the concept of discourse and the concept of reference group, there is a point of tension that needs to be discussed. A possible conflict lies in the degree of consciousness these concepts subscribe to a given actor. While critical discourse analysis implies that linguistic choices are strategic, the concept of reference group can refer to values adapted unconsciously through a process of socialization. Therefore a further exploration of the concept of discourse and its strategic usage is necessary.

A possible resolution to this tension lies in Foucauldian understanding of the roots of the discourse. Foucault means that the root of the discourse is in the kin relation between power and knowledge (1972). He argues that power is present at all times and constrains knowledge as well as produces it. Discourses are therefore related to power rather than to individuals where knowledge is both creator and the creation of it. When it comes to individuals and organizations, Foucault understands their behavior in terms of comformism, circumvention or contestation of the existing power-knowledge relations (Strega 2005). The critical discourse analysis in this understanding should then look not only for the apparent attempts to manipulate the subconscious but primarily expose *seemingly natural ways* of employing political rhetoric. Reference to strategic usage of rhetoric is then understood in relation to power structures rather than individuals. This implies that the understanding the reference frames of the discourses should be based on a more sophisticated speculation where both strategic and subconsciously used reference groups are incorporated.

4. DEFINITIONS AND LIMITATIONS

In this section, definitions for frequently used notions are provided; limitations of the paper are discussed as well as an overall evaluation of the method's ability to produce generalizations is commented upon.

4.1 DEFINITIONS

Analogy refers to a strategy for persuasion that persuades by teaching in order to remind the audience about non-contested values (Johnstone 2007: 248).

Grand discourse is in this paper, the discourse that provides foundation for other discourses, not to confuse with Jacque-Marie Emile Lacan's notion of a master discourse, a term within psychoanalysis (Gallop 1985).

Reference frame in this paper is used interchangeably with the concept of reference group.

Metaphor refers to another strategy of persuasion that persuades the audience by transferring emotions attached to other objects in order to*" reflect and create ways of imagining what is normal"* (Johnstone 2007: 59).

Norms in this text are interchangeable with discourses, *"conventional ways of talking that both create and are created by conventional ways of thinking"* (Johnstone 2007: 3).

Perception is the process by which individuals gather and interpret information (Marshall 1994).

Rhetoric in this text is *"a practice of discourse"* (Johnstone 2007: 275).

4.2 LIMITATIONS

The paper suffers from a number of limitations. The limitations concern the method, the choice of the empirical material, the application of the conceptual framework as well as the overall ambition of the paper. By providing a snap shot at the normative substance of the EU policy-making through the lenses of critical discourse analysis the paper does not intend to transfer any of its conclusions to a general question of what the EU is. It is rather directed to understand the normative construction of the EU in the Lisbon strategy alone and that by speculating on the perception of those who are responsible for putting it out there.

The paper is unfortunately limited in terms of comparative standpoints. Since identifying discourses is a tough exercise and involves normative reference frames I chose instead to expose my thinking process as much as possible in *Method and Material*. Another weakness of the paper is the connection to a limited number of documents. While reasons for that is *'to dyke rather than float'*, I am not entirely convinced that the conclusions of the paper would even apply to other documents within the chosen temporal period of the Lisbon process.

Founding a scientific paper on the basis of written texts has its ups and downs. In terms of a text analysis, one weakness, namely a tendency to impose an argument in an authoritarian way was named in a previous section. On one hand, speculations of the paper can be traced to the texts which allows for substantial critique to be made. A reader can always go back to the empirical material and build an alternative understanding. Contrary to cases based on observations, the text speaks for itself (Platt 1981: 59).

On the other hand, despite my intention to keep the study as close to the texts as possible and due to *'the power of language'* (Lakoff 2000: 42), I myself make use of analogies and metaphors etc. in order to *'persuade the reader'*. There is a fine line between the paper's ambition to hunt for discourses and the paper's other ambition - to create logic of argumentation. The paper does nevertheless suggest that analogies and metaphors were implied in the empirical texts through wording, grammar and the overall rhetoric first and foremost.

When it comes to a specific kind of texts such as policy documents they stand for a result of process/processes; and they are in this understanding a completed media

(May 1995: 162). A process that leads to completion of this type of media is not accounted for in this study. Hence, the paper suffers also from a contextual fatigue since it does not employ references to either previous documents or to any other material. This is an unfortunate feature especially when the paper's method relies on the concept of unequal access to recourses and could have been developed much more if other kinds of empirical sources were used. Consequently, Foucauldian concepts of conformism, circumvention and contention in relation to societal discourses are not applied on the material. This is due to the study's purpose to identify and discuss the normative character of the EU as it is rather than account for the process of socialization as it has been.

Another cause for limitations that the paper suffers from is associated with the choice of a fairly unfamiliar conceptual framework. While the concepts of reference group theory have been introduced to the studies of politics through sociological research on attitude formation within minority groups and in comparative studied on relative poverty (Oshagan 1996; Delhey & Kohler 2005); explanation abilities of the concepts in relation to *'mainstream politics'* have yet been unexplored. Hence, a risk for failure or misapplication of the concepts is significantly greater.

Yet one more novice choice in this matter is the combination between this particular conceptual framework and the way it is operationalized. The choice of critical discourse analysis as the means for operationalization for the concepts within reference group theory is not at all rock-solid. In the present paper, for instance, it might lead to a tendency to treat the chosen conceptual framework as a secondary means of explanation. While critical discourse analysis might at times assume a larger explanatory value, the corresponding value of the concepts of reference group theory is primarily speculative.

With this said, I now proceed to the main part of the paper.

5. THE EU IN THE LISBON STRATEGY

As suggested by critical discourse analysis: *"Ways of talking produce and reproduce ways of thinking, and ways of thinking can be manipulated via choices about grammar, style, wording and every other aspect of discourse"* (Johnstone 2007: 53). In this chapter the linguistic choices about the representation of actions, actors, and events; choices about the representation of knowledge status; choices of incorporating and representing other voices and choices about naming and wording are being identified and discussed. Then these choices are elaborated upon in terms of their strategic usage. It is next suggested that these choices are underpinned by logics of two grand discourses.

5.1 WHAT ACTORS?

While two types of actors are represented in the empirical material, the current section is aimed at identifying the representation of actors outside of the EU while accounting for actors inside the EU in *Other Voices*. This is done in order to distinguish between actors which are understood as potentially equal to the EU and those who are understood as subordinate. The difference between these two types is confirmed by linguistic choices whereas in the first case, the documents speak about the actors, while in the second case, the documents speak to them.

The overall tendency of the Presidency Conclusions from the year of 2000 and 2004 is such that the representation of other actors potentially equal to the EU lacks precision. This can be understood from such phrases as *"its competitors",* or *"other global players"* (Presidency Conclusions 23/24 March 2000; 25/26 March 2004). A more concrete representation of other actors outside of the EU we find in the background study from 1998. The definition of the other is made in the purpose already: *'Improving Responsiveness to International Change' by making a comparison between Europe and the US*. The overall structure of the study is such that the EU is

continuously being measured upon the USA's performance and its way to organize social governance, for instance:

> *"The U.S. has a rich history of local level intermediaries. But this is not simply an American phenomenon. The "velvet revolution" in East Europe is a testimony to the power of civic organizations. European governance also has a recognized place established for the so-called social partners. We have also seen the rising of the importance of non-governmental organization (NGOs) in international affairs."* (Jarboe 1998).

Even other actors are used as the means of comparison for the EU. These actors do, on the other hand, lack statehood: *"Governance in the information age is likely to move in the same direction as private sector organizational forms"* (ibid.). This discourse comes back in a more sophisticated form where the EU is said to be competing for the markets:

> *"Realising Europe's full e-potential depends on creating the conditions for electronic commerce and the Internet to flourish, so that the Union can catch up with its competitors by hooking up many more businesses and homes to the Internet via fast connections".* (Presidency Conclusions 23/24 March 2000).

Common to the representations of actors outside the EU is that the EU is said to have a specific relationship with them, that of competitiveness. Choosing to represent the actors in such a way that they vary from the USA to private actors implies that the EU is seen as having to compete with both and consequently to use both as means of judgements for its own behaviour.

5.2 WHAT ACTION?

The Presidency Conclusions are more specific when it comes to representing action. On one hand, a subscribed action is already invested in the purpose of the documents – that is the EU is given authority to draw plans for a common future development. On the other hand, the action plan in the Conclusions is connected to specific areas, for instance: *"building knowledge infrastructures, enhancing innovation and economic*

*reform, and modernising social welfare and education systems" (*Presidency Conclusions 23/24 March 2000*).* As this example shows, the action of the EU can be directed towards certain activities such as building, enhancing and modernising when it comes to, as in this case, knowledge, innovation and economy, social welfare and education. Through such a representation, the EU is given the responsibility for respective areas and thus assumes the right to carry them through. Moreover, this kind of representation of action for the EU comes through as natural domain since discussion of the member states distinguishable obligations in chosen areas is omitted. Role of the member states is rather defined when it comes to their responsibility to keep up with the EU's actions, where the EU is understood as disciplinarian who evaluates:

> *"the progress made towards agreed sectoral targets, as well as the range of structural indicators and benchmarks used to measure the level and dynamism of Member State performance"* (Presidency Conclusions 25/26 March 2004).

5.3 WHICH EVENT?

The choice of the major event was arguably suggested prior to the launch of the Lisbon strategy in 2000, namely by appointing the Forward Studies Unit to study globalization and social governance in the context of Europe and the US. Consequently, globalization and social governance are the events that define the context of the Lisbon strategy. Globalization stands out already in the first sentence of the Presidency Conclusions of the year 2000 is described as resulting in *"a quantum shift"* and a challenge:

> *"1. The European Union is confronted with a quantum shift resulting from globalisation and the challenges of a new-knowledge driven economy."* (Presidency Conclusions 23/24 March 2000).

The passage continues by relating the major event to the obligations of *"the Union"* through making a claim that the Union protects interests of the people:

> *"These changes are affecting every aspect of people's lives and require a radical transformation of the European economy. The Union must shape these changes in a manner consistent with its*

values and concepts of society and also with a view to the forthcoming enlargement." (Presidency Conclusions 23/24 March 2000).

Duly noted, '*the forthcoming enlargement*' is also described as an event but rather as the event that is happening within the Union and not outside of it. The enlargement is thus also a challenge but not the one that questions the EU's existence per sig. In the passage we also find a self-description of the European Union as '*the Union*' and definitions of the Union's responsibility, namely to protect the people as well as '*the inherent values*' from the challenges that arise in meeting this event. While people and values are treated as an object of protection, the Union is regarded as its subject suggesting traits of *paternalism.* Defining responsibility through claiming an obligation to protect people and values corresponds to Foucauldian notion of discourse as a means of legitimizing power and suggests that the EU is to be understood as a legitimate actor because of its protective character (see *Conceptual Framework*).

5.4 KNOWLEDGE STATUS

In this section the language of the documents is being commented upon while examining the claims to knowledge status that were made. Such claims are then explained as to create a certain normative character of the EU. An example of such claims can come from the verb '*to be*' that if it is used in the present tense, indicates '*universally and hence incontrovertibly true"* (Johnstone 2007: 56):

> *"The main economic challenge facing the European Union is to realise its growth potential"* (Presidency Conclusions 25/26 March 2004).

Or by using loaded verbs such as '*to need*' to support the claim:

> *"This strategy is designed to enable the Union to regain the conditions for full employment and to strengthen regional cohesion of the European Union. The European Council needs to set a goal for full employment in Europe in an emerging new society which is more adapted to the personal choices of women and men."* (Presidency Conclusions 23/24 March 2000).

Another telling linguistic choice of the representation of the knowledge status is the usage of adverbials such as *'possibly'* or 'maybe' that indicate doubt and are inviting rather than authoritative. Such adverbs are absent through the empirical material in general which translates into the actor's tendency to persuade rather than discuss. On the other hand, adverbials such as *'clearly'* or *'without a doubt'* are absent as well. The usage of the latter adverbials would otherwise suggest deliberate persuasion and are considered to be generally characteristic of a political rhetoric (Johnstone 2007: 57). This kind of middle ground suggests that the EU is seen as being able to draw from and relate to reality objectively, in other words, as a primarily rational, a-political, actor.

5.5 OTHER VOICES

When it comes to representation and incorporation of other voices a general note for the representations is that they are not being voiced directly, but rather are spoken about which suggests that the EU is seen as separate from them. Other voices include voices of the EU's population, voices of the member states and voices of *'the EU's social partners'* (Presidency Conclusions 25/26 March 2004). While the phrase *'social partners'* suggests an equal relationship and the member states are related to as subordinates, another interesting representation concerns the representation of the people. The word *'citizen'* is used sporadically; people are rather associated with a human capital: "*People are Europe's main asset and should be the focal point of the Union's policies*" (Presidency Conclusions 23/24 March 2000).

While people are represented as an object, creating special conditions for the best of human capital comes naturally: "*Research activities at national and Union level must be better integrated and coordinated to make them as efficient and innovative as possible, and to ensure that Europe offers attractive prospects to its best brains*"(Presidency Conclusions 23/24 March 2000). Social costs associated with the people are then being legitimized by a profit driven logic:

> *"Investing more and more effectively, in human capital is critical to growth and productivity as well as to promoting social integration and inclusion"* (Presidency Conclusions 25/26 March 2004).

As suggested by the Lisbon strategy, job is regarded as a public good, promised by the motto of "*More and Better Jobs*" (Presidency Conclusions 25/26 March 2004), consequential to a logic of full employment (Presidency Conclusions 23/24 March 2000). This kind of discourse can be understood as a delegation of responsibility where social costs are to be carried by other actors and not the EU itself. On the other hand, promise of jobs is the promise that connects the EU to the people thus making an attempt to legitimize the EU in their eyes.

Other areas of the relationship between the EU and the people come from areas of education and training. Once again they are seen as means of increasing skills of the workforce and are high lightened: "*If the EU is to become the leading knowledge-based economy in the world, education and training will play a vital part*" (Presidency Conclusions 25/26 March 2004). This sentence combines two aspirations: it brings up investments in education and training and legitimizes them through relating to the overall goal, namely, the economic success.

Contingencies that come from aging, injury, illness are, on the other hand, given noticeably less attention; they are not elaborated upon. Reference to "*the most vulnerable members of society*" is made once in the following way: "*protecting the most vulnerable members of society forms an essential aspect of the wider approach*" (Presidency Conclusions 25/26 March 2004). The concept of social exclusion is formulated in relation to the labour market, marking that social costs are reparable by it: "*...the best safeguard against social exclusion is a job*" (Presidency Conclusions 23/24 March 2000):

> "*Higher employment rates are critical to achieving economic growth and, given the strong correlation between unemployment and poverty, to furthering social inclusion*" (Presidency Conclusions 25/26 March 2004).

Hence, the relationship between the EU and its population is rather unique. The population of the EU is perceived to be such that it does not suffer from contingencies associated with pre information age, it instead comprises people that are able and should engage in the labour force. One could argue that while the focus of the EU is this population first and foremost, 'the *vulnerable members of society'* remain invisible.

5.6 NAMING AND WORDING

Some of the choices about naming and wording have been spoken about in the previous section. While the tendency to use managerial terminology and regard the people as human capital has been commented upon, there are other examples of choices about naming and wording that are used strategically in order to fit the purpose of the discourses. Such examples are found in the way the EU is depicted in relation to the biggest event and the way the EU is named in the empirical material.

5.6.1 A VICTIM OR A BENEFICIARY?

In the beginning of the introductory passage provided to the Presidency Conclusions from 2000, the EU is said to be "*confronted*" with an economy: *"The European Union is confronted with a quantum shift resulting from globalisation and the challenges of the new knowledge-driven economy"* (Presidency Conclusions 23/24 March 2000). The verb '*confront*' is used in a passive tense telling that the EU is not to blame for globalization it is rather victimized. In continuation of the passage provided in the present section, the definition of success for the EU is connected to a degree it can adapt to and, consequently, benefit from "*the opportunities presented*" by the new economy:

> *"The rapid and accelerating pace of change means it is urgent for the Union to act now to harness the full benefits of the opportunities presented. Hence the need for the Union to set a clear strategic goal and agree a challenging programme for building knowledge infrastructures, enhancing innovation and economic reform, and modernising social welfare and education systems"* (Presidency Conclusions 23/24 March 2000).

This wording defines the role of the European Union as a profit driven entity in globalizing economy, suggesting that two conflicting analogies, namely 'a *victim of globalization'* and 'a *beneficiary of globalization'* were made. This kind of combination of linguistic choices implies an attempt to transfer the responsibility from the EU for globalization while giving the EU a right to benefit from it at the same time.

5.6.2 THE UNION OR EUROPE?

In 2004 while evaluating the progress on the Lisbon strategy, it is noted: *"The challenges ahead are formidable but Europe has the will and capacity to achieve its economic potential*" (Presidency Conclusions 25/26 March 2004). The word *'Europe'* is mentioned several times throughout the empirical material. In this case, while confirming discourse of the EU as a potential profiteer in the context of the new economy, the EU is being regarded rather as *Europe*. In another passage the goal of taking advantage from the globalized economy is then related more explicitly to *the Union's* capacity to deliver public goods:

> *"With the strides being made by other global players, the Union must act more decisively if it is to maintain the capacity to support the European social model in the years ahead"* (Presidency Conclusions 25/26 March 2004).

On one hand, the passage rewords a simple logic of any profit driven actor: costs should not be higher than benefits. On the other hand, the EU's ability to provide public goods, *"support the European social model",* is connected to its economical success. This suggests us that the EU as a single public good provider in absence of other good providers by deliberately omitting other significant others in this matter. This can also be seen as to precise the EU's responsibility where the EU provides public goods only if it succeeds economically. The capacity to deliver the public goods is not connected to politics, rather to an economic reality suggesting that it is not a matter of an ideological divide but rather a question of objectively existing circumstances. Moreover, names such as the EU, the Union and Europe are used interchangeably suggesting that they are understood as synonymous. This can be interpreted as either a claim to represent the continent or/and a claim to represent a specific set of norms associated with this continent, an idea of Europe.

5.7 INTERDISCURSIVITY

As shown above, these representations combine different kinds of constructions of what the EU is. While the EU is regarded as one of the global actors, and shows a tendency to regard its population in managerial terms, other conflictual representations as to what the EU is are identified. In this section I suggest that this all of the representations above are strategically made in order to fit the purpose (Johnstone 2007: 59) of the two grand discourses namely *the EU as a firm* and *the EU as Europa.*

While the EU is said to compete with other global actors, the construction of the normative character of the EU as a firm underpins even other representations. As shown above the primary focus of the Lisbon strategy is on the economic performance. The logic of succeeding in the era of globalization is connected strongly to the EU's capacity to conquer the new markets. The way relationship between the EU and its population, constructed in the Lisbon strategy, is derived from the logic of succeeding despite social costs and hence, is explicitly profit oriented. The capacity to deliver public goods is then also connected to what is perceived to be an objective reality. A-politization of the rhetoric is also seen in the absence of adverbials and the usage of moderate persuasion techniques where the EU is depicted as a rational actor that reacts upon objectively existing circumstances rather than is guided by norms.

On the other hand, the EU is seen to be value-oriented and these values are regarded as a part of *Europe*. While deriving profits from the new economy, the EU is said to protect the most important ideals of the European society and that is the European social model. This analogy of the EU as Europe suggests that the EU is to be treated as a legitimate actor while representing what Europe stands for, in other words, the EU is Europe. In continuation of this discourse, the EU is said to be equal to social partners within its borders, it is said to discipline the member states while at the same time connecting to the people through the promise of more and better jobs. Moreover, the EU is said to represent new social governance while inventing its own social governance language and attitudes within social welfare systems. The idea of representing social movements as in protecting position of women on the labour market or the idea of paternalistic attitude towards its citizens in terms of protecting them from the downs of economy rather than protecting them from state power not only fits the purpose of the EU as Europe discourse but also is used as a claim to legitimacy.

6. BEHIND THE RHETORIC

As suggested by the combination made in this paper between the concepts within the reference group theory and critical discourses analysis, the notion of multiple reference groups explains the phenomenon of multivocality. The previous chapter showed that two grand discourses underpin the Lisbon strategy, *'the EU as a firm'* and *'the EU as Europa'*, whereas one accounts for its claim to objectivity, focus on economical performance and managerial language, while the other one accounts for explicitly normative claims to represent interests of the people and the idea of Europe. In this chapter an attempt to explain this tendency to combine different voices is made through an application of the conceptual framework. It is suggested that the normative construction of the EU can be explained through identifying which groups/contexts are used as normative and comparative reference.

6.1 NORMATIVE REFERENCE GROUP

As defined in *Conceptual Framework*, the concept of normative reference group refers to contexts to which the individuals are motivated to get acceptance by means of conformity. In the rhetoric of the Lisbon strategy that has been discussed so far, the discourse of the EU as Europe corresponds with the linguistic representation of a normative reference group. This is due to the undivided embracement of the values that Europe is perceived to stand for.

The values are treated as inherent to the EU itself and according to the empirical documents need to be protected from the dangers of the new economy. While the strategy is focused on economic performance, the definition of the Union's success is strongly connected to the survival of the European social model. In other words, the grand discourse of the EU as Europe shows a significant degree of conformity to the idea of Europe. The idea of Europe is then defined not only as the European social model but also as the Union's right to protect its people. Paternalism as means of relating to its population corresponds, as the Lisbon strategy shows, to the dangers of

economy and not the dangers of state power. The people are then regarded as object and not as subject in order to fit the purpose of this discourse. Consequently, the EU becomes an owner of the metaphorical Europe.

6.2 COMPARATIVE REFERENCE GROUP

A comparative reference group, on the other hand, stands for a context or a group which is used as a standard point of reference while making evaluations or comparisons, in other words, as means to make judgement (see *Conceptual Framework*). The usage of the term '*human capital'*, focus on profit as well as competitiveness with other global actors are examples of the rhetoric that comes through as natural at the same time as it is used in order to measure the level of success in comparison to others.

Within the offered conceptual framework the linguistic choices underpinned by the logic of the grand discourse of the EU as a firm represent a shift between the rhetoric of politics and the rhetoric of a firm. This rhetoric is being utilized as means to make judgement; it is a telling sign of the presence of a comparative reference group. Besides the background study from 1998 that concretely refers to the U.S. as a context of comparison, the discourse of the EU as a firm is used to judge the EU's behaviour throughout the chosen empirical documents. This can be seen especially in the most quoted citation of the Lisbon strategy, namely, its claim to become the best economy by 2010 (Presidency Conclusions 23/24 March 2000).

While rhetoric connected to the normative reference group, the EU as Europe, has been used as claim to legitimacy, the rhetoric related to the comparative reference groups is used to claim superiority in the economical sense. The EU's normative character is then divided between the two conflicting poles, where the first one represents an idea of what is good, the idea of tradition and responsibility while the second one represents an opposite idea, the idea of change and modernization. Resolution of the conflict between these two conflicting ideas seems to be a driving force of the Lisbon strategy, and the main purpose subscribed to the EU.

7. DISCUSSION

All the powers of Europe constitute, among themselves, some kind of a system that unites through the same religion, through the same set of laws, customs, letters and commerce, and provides the necessary balance of forces.

Jean-Jacque Rousseau[8]

The purpose of this chapter is to relate the findings of the study to the relevant literature on the Lisbon strategy and suggest ideas for future research. While literature on the Lisbon strategy is generous, the main point of the discussion in the paper concerns combination of the antagonistic discourses and the perceived identity of the EU and the way it is created.

In the literature on the Lisbon strategy there are competing views as to how the conflict between social governance and economic performance in the Lisbon strategy should be interpreted. According to Wilhelm Kohler:

> *"Strategy does not include any theory, let alone formal modelling, to explicitly derive this extensive and detailed set of targets. Instead, the Lisbon Strategy simply appeals to common sense, more or less claiming that targets specified are all self-evident''* (2006: 110).

Mary Daly suggests that under prioritization of the social policy issues in comparison to the economic ones can be explained in terms of the historical development of the EU institutional system. The EU has according to this point of view has engaged in social issues to an extent that is functional to its primary focus on the project of market integration (Daly 2008). Damian Chalmers and Martin Lodge (2003) on the other hand suggest that the Lisbon strategy represents *"a colonization of the welfare state by the economic process"* at the cost of elaborating an economic policy that is sensitive to social concerns.

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[8] Quotation from: Dainotto, Roberto M., 2007. *Europe (In Theory)*. Durham and London: Duke University Press, p. 136.

While both accounts explain tendencies within the EU's social policy, they would fail in explaining the usage of the metaphor Europe in representing the social in the Lisbon strategy. Why does the EU need to be associated to Europe while making a claim to legitimacy? A possible answer we find in, among others, a philosophical essay of Roberto M. Dainotto, *Europe (In Theory)*. Dainotto looks at the emergence of the idea of Europe and its utilization through time, noting that a feeling of Europeaness is making a come back from the seventeenth- eighteenth- and nineteenth century's ideas about Europe's common culture, politics and identity (2007). While the idea of Europe has evolved, the common feature of it can be found in how it is perceived from outside today. John McCormick in *The European Superpower,* for instance, writes:

> *"The idea of Europe as Not America, while tempting as a short and easy route to independence of thought and action, might be read as meaning that Europe can only be seen as distinctive in reference to the United States. In truth, however, Europe has – like all societies- free standing features and values that have grown out of its own unique experience. Thus we need to look at Europe on its own terms, using the United States only as a point of comparison and differentiation. In particular, attention needs to be paid to what the rise of the EU means – or is likely to mean- for the international system. There is an emerging consensus that the EU has transformed the place of Europe in the world, but there is much less certainty about its global significance"* (2007:166).

The current study substantiates this understanding of the EU as normatively distinctive creature; moreover, the EU's purpose is being related, at least, in the documents, to an inheritance of the idea of Europe. On the other hand, it also shows that not only outsiders compare the EU to the USA's standards; the EU in the eyes of its key players compares to the USA and consistently to a firm. The study's unanticipated finding is such that the EU's idea of goodness, the EU as Europe, and the EU's means of judgement, the EU as a firm, are not at ease. While the normative character of the EU is based on a mixture of the two grand discourses, the study suggests that there is a conflict between the reference frames that these discourses embody. Another suggestions is that the conflict is being resolved in the documents at the cost of the idea of Europe where: *"promoting economic growth and welfare provisions is not necessarily a zero-sum game if the welfare provision is understood as an investment in people and not simply as a provision for people"* (Zhou 2007:361).

If the meaning of the EU is to combine the antagonistic, or as this reading of the Lisbon strategy suggests, to accommodate contradictions between competing reference frames, a question of the nature of the European integration can be raised. While limitations of this study do not allow for any kind of conclusions on this part, one can wonder if the integration process is driven by a fear of conflict rather than economical interests. This kind of speculation needs to be investigated and developed. It would for instance mean that nation states use the EU as means to escape conflicts probably because it is more convenient to transfer certain contradictions away to a different level.

A possible future research in this area would then include an investigation of the incentives behind decisions of single European nations to join the EU, as for instance, in case of the Baltic States or Turkey. Was a fear of conflict between the old generation and the new one, a conflict between the communist past and a liberal future, a driving force for the decision to apply for the membership? Does Turkey's political elite aspire to secure secular development of the country while fearing the conflict with the religious groups? If primary political interests are understood, as suggested by critical discourse analysis, in terms of preserving power structures, how can we then explain the stagnation in the European integration during the sixties and seventies?

These kinds of questions would also imply that methodological challenges in relation to the concept of conflict as a contradiction between antagonistic reference fames should be developed. It would also imply that we need some sort of measurement that would successfully operationalize these kinds of contradictions in a scientific way. Neo-Marxist theory, stemming from Antonio Gramsci offers a possible theoretical framework for these kinds of investigations (Gill 2003). Reference group theory, that this study employs, is another one. Even if reference group theory does not enable class reductionism in the same way, its application is nevertheless not a problem free one. It needs to be developed in both conceptual and methodological sense. This study is a modest attempt to begin this journey.

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