

Between continuity and change: The EU's mechanism of differentiated value integration

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Abstract. How does the European Union integrate new values into the text of its treaties? A growing body of literature indicates that, in the past three decades, new norms and values have entered the EU's discourse, resulting in what is usually termed 'normative power Europe'. Yet the research and knowledge to-date about the EU's discursive assimilation of new values and norms is surprisingly poor. As any institutional change, such integration has the potential to undermine the coherence of the EU's identity and thus also its objective to 'speak with one voice'. This article explores the EU's discursive management of the continuity-versus-change imperative by analysing the integration of new values into the text of its treaties. This issue is addressed based on a quantitative content analysis on the full texts of European founding treaties between the 1950s and 2009. Findings show that the distribution of the EU's values in the text is not uniform: while the language of market economy and democracy is pervasive, the values of peace, European identity, rights and social justice are mentioned less frequently and in restricted linguistic environments. To account for the differences in the integration of values into the EU's treaty discourse, the article develops the notion of a discursive mechanism of differentiated value integration (MDVI). This rationale echoes the logic of differentiation in policy implementation employed by the EU. It is claimed here that, applied in the European discursive arena, MDVI allows radically different readings of the same text. This helps the EU to maintain a coherent value identity while at the same time enabling change.

Keywords: European integration; organisational change; identity; discourse analysis; treaties

Introduction

The European Union's differentiated or flexible adoption and incorporation of new rules and policies has been the focus of intensive scholarly study. Its integration of new values, however, has not merited equal attention, although the importance of values in the formation and preservation of the EU has been acknowledged by both scholars and political practitioners. Moreover, according to the growing literature on 'normative power Europe', new norms and values that have been gaining ground in the EU's discourse in the past three decades (Diez 2005) have invested it with 'ideological power' Europe-wide as well as worldwide. Yet this process has been largely under-explored. This article takes on this challenge utilising quantitative and qualitative discourse analyses of European founding treaties between the 1950s and 2009.

The article sets out to elaborate theoretically three potential discursive scenarios through which international organisations can deal with inside and outside pressures to integrate new norms. Its second objective is to examine whether new norms and values have indeed been imported into the EU discourse over the past three decades. And third, it aims to establish empirically which of the discursive scenarios investigated have been chosen by the EU and account for their rationale and implications for the larger issue of value integration.

The ‘new norms’ integrated by the EU are discussed, at the beginning of the article, by reviewing the literature on the so-called ‘normative-power Europe’ and the EU’s endeavours to promote liberal democratic values. It proceeds to discuss the challenge, faced by the EU, of integrating liberal democratic values into its discourse. Three possible discursive strategies to address this challenge are presented next, each reflecting a different approach and rationale. The three discursive scenarios at the disposal of the EU are tested by empirical analyses of EU treaty texts (henceforth, ‘the text’). The method combines a quantitative computer-based content analysis and a qualitative examination of the text.

The results show that the EU has adopted the strategy of differentiated value integration, in the sense that the old and the new values in the EU’s discourse are manifested differently. More specifically, our analysis shows that ‘democracy’ and ‘market economy’ – the old values that lie at the heart of EU identity – are discursively attached to the EU, which figures as an ‘entity’ in the text. Conversely, relatively new values, which pertain for the most part to the EU’s ‘normative power’, and which have been incorporated into the EU’s constitutional discourse only since the 1990s, are associated with other entities in the text and positioned at a ‘safe distance’ from the EU entity.

Interestingly, this discursive mechanism is similar to the differentiated integration in the context of policy issues, a strategy that enables the EU to retain its member states and deepen their integration while enabling different countries to opt out of specific policy areas such as the Schengen Area or the Eurozone. The article concludes that such differentiated integration of values allows the EU to add relatively new values to its treaty discourse without losing its consolidated identity embodied in its deep-rooted core values.

Promoting European norms

What makes a European identity distinctive? This and related issues have, for decades, figured prominently in discussions and debates regarding the EU. Most studies, however, have focused mostly on what is referred to as ‘the demand side’ (e.g., Kennedy 2013; Oshri et al. 2016) of such an identity – that is, whether or not a process is underway in which a normative European identity is being formed among the populace – while under-emphasising questions of how this identity is represented by EU institutions in the first place, as well as how it is being (re)constructed, if at all (exceptions are Risse 2010; Checkel & Katzenstein 2009). Yet, ‘the supply side’ is crucial in shaping the content and weight of such an identity, as well as the direction in which it is evolving. Hence, this article focuses on the supply side of a European normative identity, probing ways in which the EU’s discourse, both oral and written, drives its formation.

The idea of a European identity is commonly regarded as anchored in liberal democratic values (McCormick 2010). Promoting *democracy* and *market economy* has been a prominent role of the EU since its early days – indeed, championed by EU members-to-be even before its establishment in 1992. In fact, democracy and market economy have been defining aspects of the EU’s six founding member states. The pivotal role of democracy in the establishment of the EU is shown, for example, in the Single European Act: ‘[The member states are] DETERMINED to work together to promote *democracy* on the basis of the fundamental rights recognized in the constitutions and laws of the Member States’ (Single European Act, preamble; emphasis in the original). The value of market economy formed the EU’s

foundation. For example, the Treaty of Rome notes that '[t]he mission of the European Coal and Steel Community is to contribute to economic expansion, the development of employment and the improvement of the standard of living in the participating countries' (Treaty of Rome, Article 2). Similarly, the Treaty of Paris states that '[t]he Community shall have as its task, by establishing a common market and progressively approximating the economic policies of Member States, to promote throughout the Community a harmonious development of economic activities' (Treaty of Paris, Article 2).

As of the late 1980s, however, the EU has been openly promoting new norms and values, which have augmented what is called its 'normative power' (Manners 2002). The European Commission's White Paper on European Governance, for example, emphasised the need to reinforce '*European identity* and the importance of shared values in the Union' (CEC 2001: 27; emphasis in the original). According to the Declaration of European Identity, the major objective in defining it is to build support for 'the principles of representative democracy, of the rule of law, of social justice ... economic progress, peace and of respect for human rights' (Heads of State or Government 1973: 2). According to the preamble to the Lisbon Treaty, the EU is based upon 'universal values of the inviolable and inalienable rights of the human person, freedom, democracy, equality and the rule of law' (Lisbon Treaty, preamble). The key role played by these values is also evidenced in oral discussions and media statements delivered by EU officials. For example, while congratulating Donald Trump on his victory in the American presidential election, German Chancellor Angela Merkel said:

Germany and America are bound by common values: democracy, freedom, as well as respect for the rule of law and the dignity of each and every person regardless of their origin, skin, colour, creed, gender, sexual orientation or political views. Cooperation with the United States must be based on these values. (Merkel 2016)

Over the last three decades, the EU has not only been 'talking values' in the essentially rhetorical sense, but it has also been acting upon these values. Among the examples is its policy of democracy promotion, introduction of human rights clauses in trade agreements, emphasis on encouraging regional cooperation, and focus on strengthening international institutions and empowering the European Parliament – the only EU directly elected body – in the legislative, budgetary and supervisory spheres. According to some leading researchers (e.g., Dixon 2008; Risse 2010; Schimmelfennig 2002; Schimmelfennig et al. 2003), the EU promotes liberal-democratic policies as regards its members and accession countries.¹ Accession countries must meet political and economic criteria before and as a condition of their accession to the EU. These criteria (known as the 'Copenhagen criteria'), set out in Article 6(1) of the Treaty on European Union, require that the candidate country have 'achieved stability of institutions guaranteeing democracy, the rule of law, human rights, respect for and protection of minorities, the existence of a functioning market economy as well as the capacity to cope with competitive pressure and market forces within the Union' (European Council 1993: 7.A.iii).

Normative power Europe

The concept of 'normative power Europe' was first introduced, in 2002, by Ian Manners, who attributed one of the EU's distinctive qualities and a source of its 'soft power' to a

set of shared values including substantive normative principles such as sustainable peace, human rights, rule of law, social solidarity and sustainable development (Manners 2008). These new 'normative power' values have served mainly to legitimise the EU's functional expansion. As the EU developed into a new type of political system, while in the process not only divesting its member nation-states of their power and sovereignty but also impinging on their citizens' everyday lives, it needed different normative underpinnings as a source of legitimacy. The EU's functional expansions, such as the setting of regional or foreign policies, has been described as 'governance without statehood' (Wallace 1996), which has affected citizens and their rights. This, in turn, has required the EU to reconstruct and rearticulate its identity rooted in its core values. In other words, in expanding to new policy fields, the Union has been compelled to define its ultimate goal(s).

Since the introduction of the concept by Manners, normative power has become one of the most widely debated approaches to understanding EU identity and external actions (Birchfield 2013). The academic debate has largely focused on conceptual clarifications in an endeavour to establish whether the EU's actions as a global actor have indeed been normative. However, the ways by which this putative normative change has occurred and has been discursively implemented into the EU's constitutive text have never been tested.

To sum up, while since its early days the EU discourse has foregrounded *democratic* and *market economy* values, the Union's declared intentions and the literature on Europe's normative power suggest that, as of late, we can expect to find evidence attesting to the promotion of liberal values, notably, *social justice, peace, rights* and *European identity*.² As noted above, these principles have been specifically mentioned in the speeches of EU leaders, documents and literature, so it stands to reason that they have also found their way into EU treaties. The following sections will investigate whether these values have indeed been incorporated in the EU official discourse and explore the mechanisms that might have enabled such a major change.

Balancing between continuity and change in intergovernmental institutions: Three scenarios of value integration

The scholarship on international organisations has increasingly been concerned with the processes of evolution and change within intergovernmental organisations (IOs), and more specifically, when and why change occurs (Barnett & Coleman 2005; Barnett & Finnemore 2004). Two plausible, albeit somewhat conflicting, analytical positions regarding organisational change in general, and organisational adaptation in particular, have been advanced in the vast and growing literature on organisational behaviour. The debate centres on whether organisational behaviour is path dependent or environmentally determined: Should the process of organisational adaptation be viewed as shaped by a rigid resistance to change, or as a predetermined reaction to peremptory external environmental forces and expectations (Aldrich 1979; Child 1972)?

IOs and global governance institutions are inherently subject to conflict between their role in promoting stability and their capacity to change and innovate, as well as to adapt to and learn from changing circumstances and exogenous stimuli (Duit & Galaz 2008; Haas 1990). On the one hand, institutions tend to be static and path dependent, and prone to

clinging to the status quo and resisting change (Thelen 2003; White 2008). They invest considerable resources in maintaining control systems that ensure a degree of homeostasis and routine, which in turn provide them with continuity and identity. On the other hand, the neo-institutionalist analysis of organisational behaviour posits the concept of ‘organisational adaptive stability’, whereby ‘change is recognized as an ordinary part of institutional life’ (Peters 1999: 147) inasmuch as institutions respond to the changing environment through learning and adaptation (Barnett & Finnemore 2004). Organisations constantly adapt to pressures from external, institutionalised expectations, which emanate from changing environmental conditions and circumstances (Meyer & Rowan 1977; DiMaggio & Powell 1991?). According to this rationale, IOs ‘adapt easily, and often ritualistically, to changing environmental conditions, and such adaptation is expected to result in structural similarities between the organization and its environment’ (Krücken & Drori 2009: 8).

Thus, the path dependent approach contends that introducing change into organisations and motivating their collective adaptation to changing circumstances is inherently difficult, and may be altogether impossible, while the environmental-deterministic approach argues that organisations are literally compelled to adapt to changing environmental conditions and circumstances. In recent years, however, several scholars have questioned the feasibility of modeling organisational behaviour and adaptation as either path dependent or environmentally determined, and have suggested the possibility of an interaction between these two driving forces (e.g., Barnett & Finnemore 2004; Chweroth 2010; Park 2010; Steffek 2010; Vetterlein 2007; Weaver 2008).

This approach posits a trade-off between the need for institutional stability and the imperative for change that generates a dynamic equilibrium between inertia and development (Chreim 2005). This model perceives organisational adaptation as a process reflecting strategic choices and selection, and rejects a deterministic view of organisational behaviour on the grounds that it does not ‘give due attention to the agency of choice and strategy’ (Scott 2016:15). Indeed, the actions of institutions and organisations have been increasingly perceived as ‘governed not by a “logic of consequentiality,” which is determined by a fixed set of preferences ... [but] by the “logic of appropriateness”; namely, a collection of interrelated rules and routines that define appropriate actions in terms of relations between roles and situation’. On this rationale, organisations are not ‘institutional dopes’ (DiMaggio & Powell 1991), in the sense that they are not acting ‘blindly’ at the bidding of their members or in response to pressures (and expectations) arising from their environment. Instead, any kind of pressure allows for some degree of strategic freedom through which organisations can protect their core elements, or essential structures, by buffering and decoupling (Meyer & Rowan 1977; Thompson 1967).

Experiences such as those of the European Union permit us to use the history of a key international organisation as a diagnostic for testing when and how an organisation changes its discourse. As a multilevel governance system, the EU is constantly changing, not just in numbers, but also through the addition of new policies and areas of cooperation. On the one hand, there is a need to include more members, while on the other, not all members are able, or willing, to cooperate in all policies. The EU’s drive to encompass all members in its policies and to absorb new members, along with the imperative to expand the areas of cooperation, has generated a remarkable adaptive capacity to balance between inclusiveness and coherency. In that respect, the EU’s challenge of integrating new values into its treaty

discourse can be seen as homologous to institutional challenges facing it, especially widening and deepening integration: Both discursive and institutional aspects are subject to immanent tension between coherency and inclusiveness. To the extent that any organisational change starts out as a discursive practice (Boje et al. 2004) the analytical emphasis of this article is on the text. In line with the literature on institutional changes, three potential scenarios representing the EU's discursive strategies are explored.

Three discursive scenarios of value integration

The incorporation of new value dimensions into the EU's constitutional discourse may follow three theoretical discursive mechanisms, or scenarios. One such scenario is simply to refrain from integrating new values into the constitutional discourse, or at least not to call attention to these notions – despite a declared intention to do the opposite. Adhering to and promoting only the old values of democracy and market economy would have enabled the Union to maintain a coherent value identity. This discursive strategy resonates with the emphasis contemporary institutional analysis puts on institutional stability, in line with its focus on structural constraints and continuity. It seems, however, to rest on deception in that it contravenes the declared policy. Either the declaration was untrue or the discourse veils an important policy element. This scenario is therefore termed here the '*deception strategy*'.

Alternatively, the new values could be discussed in the EU discourse on par with its core values of democracy and market economy. Put differently, new values could be fully integrated into the EU treaty discourse and manifested similarly to the old values. This scenario resonates with the logic of institutional change. Whether in response to outside stimuli or inside pressures, the EU has declared its commitment to and fully integrated new values into its treaty discourse. This scenario is termed the '*full integration strategy*'.

The third scenario for integrating new values into the EU treaty discourse can be seen as a middle-path alternative, between all (full integration) and nothing (no integration): new values are incorporated into the treaty text but addressed and treated differently from the old values. Specifically, new values do figure in the discourse, but are discursively differentiated from the EU core values by not being associated with the EU as such. If the old values are mentioned or discussed in clear association with the EU entity, the new values will be associated with other entities in the text such as regions, citizens and international organisations. Put differently, although the new values will have been integrated into the discourse, they will not be attached directly to the EU, which is flagged exclusively by old values. This scenario enables the integration of new values into the EU discourse but positions them at a 'safe distance' from the EU as a textual entity, thus differentiating between the established and the new values. It presupposes a mechanism that mediates between two opposing forces: change and continuity. It also resonates with the EU's strategy to deal with further integration in policy matters: differentiated integration. We call this scenario the '*mechanism of differentiated value integration*' (henceforth, MDVI), for two reasons. First, it differentiates between the new and the old values; and second, it results in a modular structure, in that, in the text, certain entities are associated with certain values, in a recurrent pattern. Thus, the reader will have no trouble dissociating old values from new ones as they consistently flag different entities.

Under differentiated integration, member states do not share in all EU activities in equal measure. Similarly, according to the MDVI hypothesis, new values are shared out among different entities within and outside the EU, such as regions and citizens. Whether or not it is implemented out of awareness, the MDVI mechanism is very similar to the differentiated integration in policy areas. As with the latter strategy, which allows the EU to grow and at the same time to deepen the cooperation among its members, the MDVI path enables the EU to speak with one voice and to present a coherent identity by adhering to the two most prominent values of democracy and market economy throughout all treaty texts, on the one hand, while on the other, to bring in new values by distributing them among various other entities. The MDVI creates a welcoming environment for new values, which are not fully integrated yet not completely overlooked. Therefore, the same discourse allows two different readings. On the one hand, EU identity is perceived as stable because, throughout the treaty text, the EU is consistently flagged by its constitutive values of democracy and market economy. On the other hand, from one treaty to the next, one cannot but acknowledge textual changes that introduce new norms and values, thus remolding Europe's normative image.

Data and methods

The three discursive scenarios described above are tested based on the full text of fundamental EU treaties in the period 1951–2008,³ whose texts form the bedrock of European integration.⁴ The 1950s, which is the first decade of European integration, was marked by the creation of the European Coal and Steel Community and of the European Economic Community. The single major revision of the European Economic Community treaty was carried out in the Single European Act, which was followed by the Merger, Maastricht, Amsterdam and Lisbon treaties. In an attempt to capture the spirit of the times, this study analyses the non-consolidated versions of these treaties. In other words, we examine the treaties as drafted at the time of their ratification and entry into force and not the latest (and altered) versions of these treaties.⁵ The treaties lay out the EU's core and focal objectives, values, norms, conceptions and practices, making it possible to trace the consolidation of its identity over time, in light of and in response to change.

These treaties are the EU's primary legislation, thus containing formal and substantive provisions for implementing the policies of the European institutions. On the other hand, the provisions and goals they include are laid out in broader terms than in other legislative documents, which are more detailed and bureaucratic. The greater generality of the discourse serves the purpose of the textual analysis undertaken here, as the focus is on values, notions that are fairly abstract. Changes to EU treaties are negotiated in intergovernmental conferences (IGCs) and must be signed and ratified by all member states. These changes generally advance integration. For instance, the Maastricht Treaty introduced the co-decision procedure while the Lisbon Treaty extended it to cover more policy areas. Both these changes boosted the role of the European Parliament in the legislative process. Thus, analysing treaties afford insights into the political processes that drive changes in discourse patterns focusing on EU values. Since treaties not only encompass the substantive content of European values (Mayer & Palmowski 2004) but

also reflect the interactive processes by which values are conveyed, the analysis takes into account contextual information such as where, how, why and by whom a treaty was signed.

Textual analyses

As noted, relying on the literature and on the 1973 White Paper, in which the EU declared its constitutive values, we decided *ex ante* to target six liberal-democratic EU values: *democracy*, *market economy*, *rights*, *European identity*, *social justice* and *peace*. The examination of the different patterns and emphases put on values throughout all treaty text was carried out using a dictionary technique, which is a variant of the ‘bag-of-words’ method (Monroe & Schrodt 2008; Young & Soroka 2012). Lists of words or expressions are compiled that convey the meaning of a certain value domain – for example ‘democracy’. The presence of that value in the text is indicated by the presence of words or expressions listed for it. Dictionaries were also built for entities that correspond to the different levels of authority operating in and outside the EU space (Hooghe & Marks 2003) – for example, ‘European Union’, its ‘member states’, ‘international organisations’, ‘third countries’, ‘citizens’ or ‘regions’. To extract values from the text, the bag-of-words procedure was chosen over alternative techniques, such as data redaction or automated text analysis (Grimmer & Stewart 2013), for two main reasons: discourse on values in legal documents such as treaties uses only a small subset of the lexicon (less than 5 per cent); and the patterns targeted are well represented and accurately gauged by a simple list of key words. Thus, a dictionary technique, accompanied by a close reading of the text and by a textual demonstration, adequately serves the purpose of this investigation.

The quantitative analysis is based on computerised methods. Content analysis software has become a mainstay of empirical research of political and legal documents (see, e.g., Bäck et al. 2014; Beck et al. 2012; Laver et al. 2003; Proksch & Slapin 2010). An advantage of this method is that it makes it possible to analyse massive textual information such as party manifestos, legal speeches and constitutions, and to compare between different texts. The assumption behind dictionary techniques is that words may count as data that can be quantified and that can reveal patterns targeted. This study used WordStat 6.0 Software.⁶ As noted above, dictionaries of key words were built for the different values and entities in and outside the EU,⁷ and utilised for the analysis of the European founding treaties. Dictionary-based automated content analysis treats words as units of observation, and vocabulary choices as the primary indicator of latent content. Thus search terms that are part of the custom dictionary are construed as indicators pointing to the treaties’ subject matter. Words in each dictionary are semantically related (Klebanov 2006). Iteration of words or word combinations such as ‘market economy’ would signal the subject matter discussed or the issue debated.

Utilising lexical tools such as WordNet, spelling dictionaries and English thesauri, we chose synonyms, hypernyms, hyponyms, coordinate terms, holonyms and meronyms for each category (values/entities). Dictionaries were compiled via a recursive process. First, words were allocated to each category, and then a dictionary was computed for the new lexicon constructed in the previous step for a given value or entity. For example, for ‘democracy’, Wordstat’s lexical tools listed three definitions: (1) the political orientation of those who

favour government by the people or by their elected representatives; (2) a political system in which the supreme power lies in a body of citizens who can elect people to represent them; and (3) the doctrine that the numerical majority of an organised group can make decisions binding on the whole group. As all the three meanings were deemed relevant to the value of 'democracy' as discussed in the treaties, synonyms, metonyms, hyponyms, etc. were obtained for each. As the second step, the newly created lexicon for the value of 'democracy', representing a semantic field for this concept, was used for the computation of a comprehensive dictionary comprising related terms, as detailed above, for the lexical items listed. Such a recursive process of building the dictionaries enabled the inclusion of new items using a semi-automated method: the software automatically provided synonyms, etc., but only those deemed relevant for the category were manually selected. This filtering was performed manually according to the lexical definitions supplied by the software. The same recursive procedure for dictionary building was employed for each of the entities and values investigated.

To increase reliability, two parallel lists of synonyms were compiled via the same process by two different human coders and subsequently merged so as to include only the items recorded by both. This procedure generated a final overall list of 352 words.⁸ Using the software, stop-words (words with low semantic value such as pronouns and conjunctions) were excluded from the analyses. The problem of lexical ambiguity, which is a core drawback of dictionary techniques, was solved by using the keyword-in-context (KWIC) analysis. The context was recovered for all ambiguous words, and each case was dealt with separately. We then stipulated rules for disambiguating words occurring in the dictionaries constructed. For example, the word 'demand', which had been relegated to the 'market economy' category, could have different meanings in the text. A rule was included that, to be considered as relevant, this item must adjoin certain other expressions such as 'supply', 'decline' and so on.

For the liberal-democratic values and the entities flagged by them, the quality of the custom dictionaries was tested using two consecutive inter-coder reliability tests: comparing the coding of two human coders; and comparing the coding of the human coders to the automated textual analysis.

Following extensive training, two coders identified independently values and entities that were mentioned and/or discussed in a paragraph, which was set as a unit of analysis. Overall, 400 randomly chosen paragraphs (10 per cent of the total number) were analysed. Inter-coder reliability, tested on 25 per cent of the coding items, resulted in a mean (using Alpha Krippendorff) of 0.93, and no lower than 0.86. Comparison between the automated and human coding showed that the dictionary met the standards of human coding (all of the results are presented in the Online Appendix). On a scale of 0–1, the average precision was calculated as 0.813 and the average accuracy as 0.875, attesting to the high level achieved in categorising the documents for custom dictionaries for all the values and entities.

This study used the qualitative examination mainly to validate the computerised analysis. In the authors' view, neither dictionary-based analyses nor analyses based on textual proximity between values and entities (see below) can replace the actual reading of the text. Therefore the presentation of the main findings below is followed by examples of textual analysis.

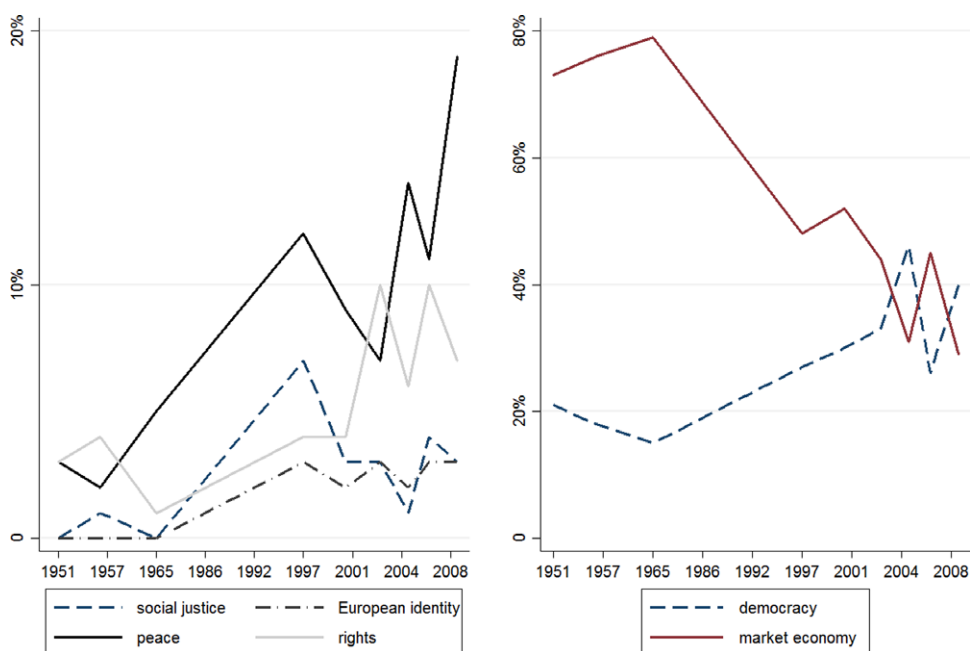


Figure 1. Proportion of values-to-values in the European founding treaties and the changing patterns thereof.

Notes: The right-hand panel presents the changing patterns of the two most prominent values in the European treaties: democracy and market economy. Over time, the salience of democracy intensifies while it declines for market economy. Nevertheless, these two values represent the core of European values in constitutional text. The left-hand panel shows the changing salience of four other values: European identity, peace, social justice and rights. As from the fourth treaty (i.e., the Single European Act 1986) the relative importance of these values increases.

[Colour figure can be viewed at wileyonlinelibrary.com]

Findings: From MDVI to full integration

The three discursive scenarios discussed above assume different textual relations between old and new values, on the one hand, and political entities, on the other, in EU treaties. The deception strategy scenario assumes that, despite the EU's declared intentions to promote new values, no such values would figure in the treaty text, on account of certain qualities of institutional life that ensure endurance and stability. This scenario would be validated if the old values (i.e., economy and democracy) were present in the text to the exclusion of any new values.

The relative salience of EU values throughout the treaty text is presented in Figure 1. The left-hand panel documents the rise of new values in the EU discourse since the 1990s – namely, social justice, peace, rights and European identity. Starting out close to zero in the 1951 treaty, their total share rises to over 30 per cent in the 2008 treaty. These findings refute the deception strategy hypothesis, which predicts that no mention of new values would be made in the EU treaty text. The right-hand panel traces the changing salience of democracy and market economy – the two most dominant values in the European treaties. A pattern

clearly emerges in which the salience of democracy rises concomitantly with the declining salience of market economy. Nevertheless, these two values clearly dominate the text (94 per cent in the Treaty of Rome and 69 per cent in the Lisbon Treaty).

These findings confirm that the EU (then the European Economic Community) did not use the deception strategy but rather honoured its declared intention to integrate new values into its constitutive treaties. Accordingly, we proceeded to test the two remaining discursive scenarios: full integration and MDVI. As already stated, both these scenarios assume that new values will be integrated into the treaty text, albeit via two different mechanisms. The full integration hypothesis posits that new values will be associated with the EU on par with established ones. The MDVI hypothesis states that old values will remain associated with the EU while new values will be attached to other political entities. These two scenarios were studied quantitatively using proximity analysis.

Proximity or similarity measures, such as squared Euclidean distance or cosine similarity, are important indices in text clustering. They have been used to measure the affinity of media messages between countries (Sheafer et al. 2014) and to gauge the relationship between actors and concepts within affiliation networks. It is expected that the distance between objects within a cluster would, on average, be less than between objects in different clusters (Leifeld 2013). Thus, the greater the proximity between an entity and a value, the higher the chance that they belong to the same cluster. For example, the following quotation includes two entities: ‘European citizens’ and ‘member states’ (in bold). Since the ‘right to vote’ (in italics) is more proximate to citizens than to member states, it is assumed to be conceptually associated with citizens to a greater degree than with member states.

Every **citizen of the Union** has *the right to vote* and to stand as a candidate at elections to the European Parliament in the **Member State** in which he or she resides, under the same conditions as nationals of that State. (Maastricht Treaty, Article 19; emphasis added)

By contrast, inasmuch as the next quotation mentions only one entity, the EU, all the values that figure in it are construed as being associated with the EU.

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. (Maastricht Treaty, Article 2; emphasis added)

To sum up, values that co-occur with entities are assumed to be associated with them.

To tap associations between entities and values, a matrix of proximities in the form of [Value X Entity] was generated for all the entities and values investigated. Table 1 displays that matrix, with the Jaccard similarity coefficient representing the proximity between entities and values. Analysis was carried out on the pooled data (nine treaties altogether). We calculated the probability for the co-occurrence of each value(V)–entity(E) pair (the Jaccard coefficient), by limiting the textual window to 50 words. The Jaccard coefficient between V and E is:

$$\alpha(V, E) = \frac{V \cap E}{V \cup E} \quad (1)$$

Table 1. Heat-map plot of the relationship between values (rows) and entities (columns)

| Value/entity | EU | Countries | Beyond the EU | Citizens | Regions |
|-------------------|-------|-----------|---------------|----------|---------|
| Democracy | 0.315 | 0.163 | 0.147 | 0.038 | 0.016 |
| Market economy | 0.273 | 0.148 | 0.027 | 0.011 | 0.021 |
| Peace | 0.124 | 0.182 | 0.130 | 0.012 | 0.01 |
| Rights | 0.050 | 0.087 | 0.054 | 0.115 | 0.012 |
| European identity | 0.023 | 0.067 | 0.053 | 0.101 | 0.061 |
| Social justice | 0.026 | 0.010 | 0.027 | 0.067 | 0.100 |

Notes: The table shows each value's probabilities of co-occurring with entities (jaccard coefficient). The darker the cell is, the higher the probability that values and entity co-occur. Results show that democracy and market economy are most likely to appear in paragraphs related to the EU (probabilities of 0.31 and 0.27, respectively) while the talk on rights will appear proximate to discourse on EU citizens and discourse on European identity is more dispersed but appears more frequently when talking about citizens.

The numerator represents cases in which both the entity and the value occur inside the 50-word window, while the denominator represents cases where one item is found but not the other. Equal weight is given to matches and non-matches. Results presented in Table 1 show that, across the entire treaty text, on average roughly 30 per cent of the cases in which 'EU' and 'democracy' or 'EU' and 'market economy' appear in the text, they appear together – that is, inside the window. Thus, the proximity between these two values and the EU entity is significantly high. In fact, none of the other values targeted gets even close to that degree of proximity with the EU entity. It seems, therefore, that in the text the EU entity is flagged by the values of democracy and market economy.

A very different picture emerges as regards the new values: these are linked in the text with entities other than the EU. Peace, for example, is mostly attached to member states and entities outside the EU such as international organisations or third countries. The value of peace is sometimes attached to the EU entity as well, but to a much lesser extent. Rights and European identity are attached to citizens, while social justice is attached to regions. Results presented in Table 1 appear to confirm the MDVI hypothesis: new values are dealt out among different entities rather than being attached to the EU. By contrast, the full integration hypothesis was not validated.

These findings are substantiated by the qualitative examination of the treaty text. An example for the proximity relations between the EU entity, the case in point signified as 'the community' (in bold) and the value of 'market economy' (in italics) can be observed in the following quotation:

The Community shall have as its task, by establishing a *common market* and an *economic and monetary union* and by implementing common policies or activities. (Treaty of Rome, Article 130c; emphasis added)

Below are examples for proximity between new values and different entities in the text. The first quotation exemplifies the entity-value relationship between regions and social justice, while the second – between the member states and national identity.

The European *Regional Development Fund* is intended to help to redress the main regional imbalances in the Community through participation in the development and structural adjustment of **regions** whose development is lagging behind and in the conversion of declining industrial regions. (Treaty of Rome, Article 130c; emphasis added)

The **Union** shall respect the equality of **Member States** before the constitution as well as their *national identities*, inherent in their fundamental structures, political and constitutional, inclusive of regional and local self-government. (Maastricht Treaty, Article 4; emphasis added)

So far, the analysis has yielded rather clear indications in favour of the discursive MDVI hypothesis. In a way, the EU discourse mirrors the mechanism deployed by the Union to further integration and to foster cooperation in new policy areas at the cost of differentiation or divergence (Holzinger & Schimmelfennig 2012). The modular structure resulting from such differentiation of values *vis-à-vis* entities in the text is homologous to differentiated integration of policies: the EU offers its member states integration *à la carte*, as it were, enabling countries to opt out of certain policy implementations. But not just the structure is similar. The goals of the two strategies are similar, too. They both serve as a means of enabling flexible integration in the face of heterogeneity. In policy – differentiation is a tool for the EU to avoid forcing member states into cooperation in fields where they do not wish or cannot afford to cooperate. In discourse – the EU’s goals are to increase its mandate and to expand itself to other realms. The strategy for accomplishing this, while at the same time keeping its identity stable, is by differentiating the discourse on values such that the Union, as a lexical entity, would still be flagged by old values and less so by the new ones.

While the analysis of the pooled data supports the discursive MDVI hypothesis, it offers no insight into the ways by which differentiation is enacted in the discursive dynamic. In order to determine whether new entities were integrated into the treaty text simultaneously with new values, we performed an additional proximity analysis treaty by treaty. Moreover, as already explained, the entity value proximity data was bolstered by a qualitative examination.

Figure 2 plots proximity matrices for entities and values for each of the nine treaties separately. Values are positioned in relation to entities on the maps, which were produced using multidimensional scaling (MDS) and which represent the geometric proximities between values and entities for each treaty. Each category is represented as a node: values as circles and entities as diamonds. Categories (entities and values) that tend to co-occur in the text appear close together on the map and are connected by a thicker line, while categories that are not proximate in the text are sketched far apart and are connected by a thinner line. Categories that, in the text, were not found to be interrelated or to co-occur are located on the map far apart and are not connected by a line.

Importantly, the maps show that, in the integration process, new values entered the treaty discourse concomitantly with the formation of new players in the socio-political arena. In the 1950s and 1960s – corresponding to the Treaties of Rome and Paris, and the Merger – the only entities mentioned in the text are member states and EU (then named the European community). The panels for these three treaties show close proximity between these two entities, on the one hand, and the values of democracy and market economy, on the other.

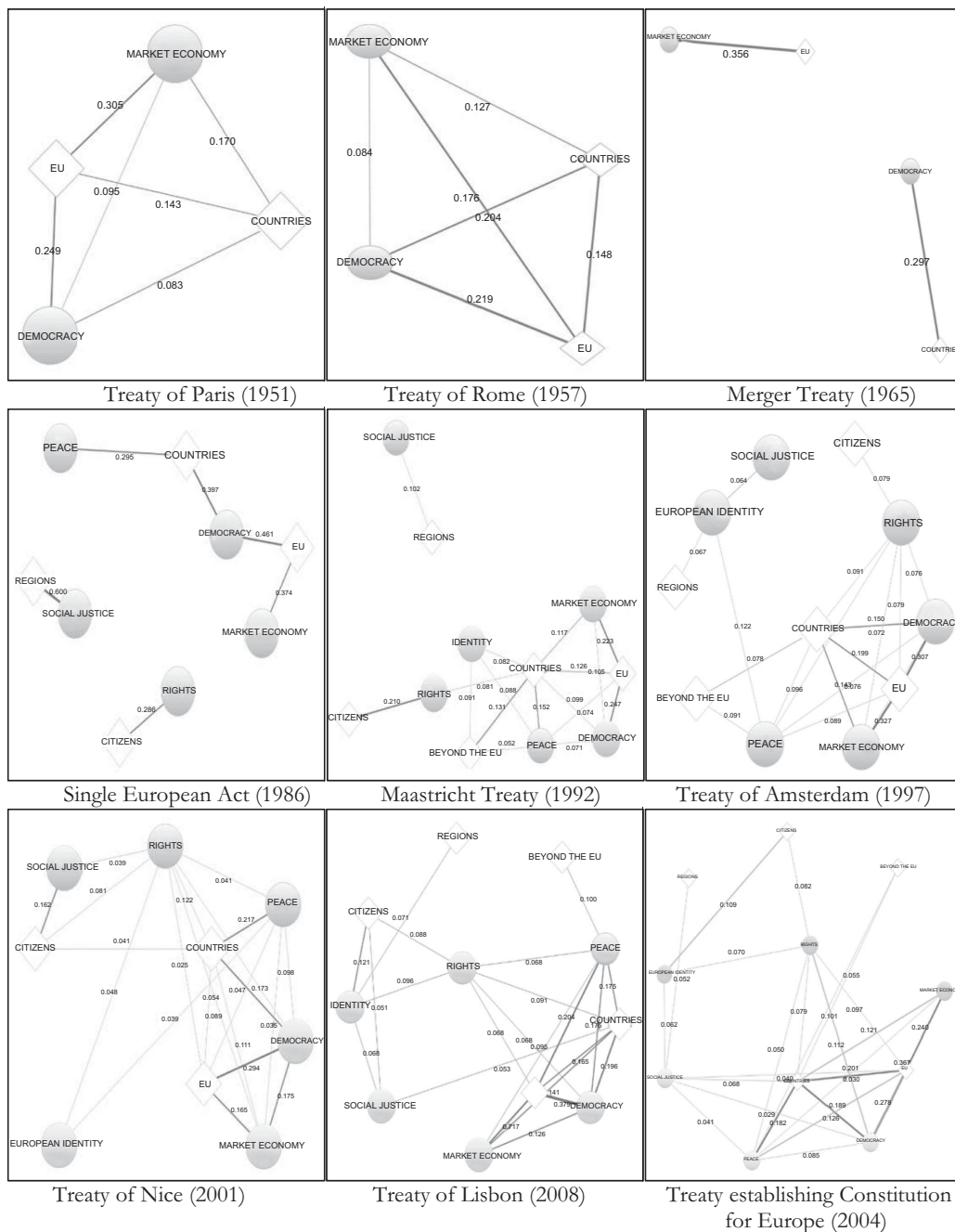


Figure 2. Multidimensional scaling of proximity matrices for entities and values.

Notes: Categories (entities and values) that appear close together on the plot tend to occur together and have a shorter and thicker line connecting them, while categories that exhibit a remote proximity between them are sketched far apart and have a longer and thinner line connecting them. Each category is represented as a node; circles represent values, diamonds represent entities.

The entities [European] citizens and regions appear in the discourse much later (in the 1986 and 1992 treaties, respectively) and therefore do not figure in the Treaties of Rome and Paris, and the Merger – and, notably, neither do the values of social justice, rights or European identity. Rights are discussed in the first three treaties, albeit not in the context of human or minority rights but as the four freedoms⁹ (i.e., in relation to market economy). Moreover, these economic rights failed to pass the 2 per cent threshold stipulated in the analysis and hence are not marked on the first three maps.

This stands to reason, as the Treaties of Rome and Paris, and the Merger reflect a sectorial and functionalist approach; social justice, European identity and peace were not of primary concern to their creators. The Treaty of Paris, which established the European Coal and Steel Community, was concerned solely with the coal and steel industries. Such a sectorial approach gained prominence after the failure of the European Defense Community in 1954. The European Economic Community Treaty, as well as the European Coal and Steel Community and the 1957 Euratom, covered well-defined economic spheres.

The proximity maps for subsequent treaties (the Single European Act and the Maastricht Treaty) reveal a different picture. Not only that the entities of citizens and regions had found their way into the treaty text, but they are also attached to the newly surfaced values of rights and social justice. The EU seems to have integrated new values concomitantly with the emergence of new entities on the scene, but – notably – it shuns them textually, as it were. Indeed, the EU as an entity in the text or, to use Epstein's (2013) terminology, a 'speaking subject', is not closely associated with these values, which are instead attached to other, more recently introduced entities. The two quotations above illustrate this point.

In the preamble to the Single European Act, the EU treaty text includes, for the first time, a statement regarding the promotion of democracy on the basis of fundamental rights:

[The EU is] DETERMINED to work together to promote *democracy* on the basis of the *fundamental rights* recognized in the constitutions and laws of the **Member States**. (Single European Act, preamble, emphasis added)

Note that 'the fundamental rights' in the quotation are framed as a prerogative of those who are subject to the constitutions and laws of the member states. The entity which is the closest to the rights based on the Jaccard proximity measure, and which is, consequently, associated with this value textually, is 'the Member States' listed as the signatories of the treaty earlier in the preamble.

The entity value configuration in MDVI is not static. Thus, in the Single European Act, rights are proximate to citizens but remote from the EU and other textual entities, while in the Maastricht Treaty, this value becomes associated with the entities of the EU as well as member states (see the respective maps). Textual analysis of the Maastricht Treaty supports this conclusion:

The Union shall respect *fundamental rights*, as guaranteed by the European Convention for the Protection of *Human Rights* and *Fundamental Freedoms* signed in Rome on 4 November 1950 and as they result from the constitutional traditions common to the **Member States**, as general principles of Community law. (Maastricht Treaty, Article 6(2), ex Article F.2; emphasis added)

The closest entity to the value of rights in this Maastricht treaty passage is the EU, and not the Member States. An in-depth reading of these lines suggests that the EU is presented as more committed to rights than in the Single European Act. This stands to reason, as the Maastricht Treaty institutionalised EU citizenship, granting citizens a series of general rights such as the free movement of goods and services, the right to vote and stand as candidate in municipal elections and in elections to the European Parliament, and the right to petition the European Parliament and apply to Ombudsmen. EU citizenship was introduced precisely in an attempt to create a closer bond between the Europeans and the EU institutions (e.g., Montero 1992).

The Treaty of Amsterdam clarifies Article 6 (formerly Article F) of the Maastricht Treaty by stating unequivocally that the EU is founded on the principles of liberty, democracy, respect for human rights and fundamental freedoms, and the rule of law – that is, tenets that are shared by the member states. It also amends the preamble to the Maastricht Treaty, confirming the member states' commitment to fundamental social rights as defined in the 1961 European Social Charter and the 1989 Community Charter of the Fundamental Social Rights of Workers. And finally, the Treaty of Lisbon guarantees the enforcement of the Charter of Fundamental Rights and gives the EU a mandate to accede to the European Convention on Human Rights. Moreover, rights are related not just to citizens and the EU, but also to countries beyond the EU, and to other values, such as peace. Thus:

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**. It shall contribute to *peace, security*, the sustainable development of the Earth, *solidarity* and mutual *respect among peoples*, free and fair trade, eradication of poverty and the protection of *human rights*. (Maastricht Treaty, Article 3(5); emphasis added)

The dynamics shown above point to a gradual process of integration in which the MDVI might be a temporary strategy for integrating new values into the treaty text. Possibly, such integration starts with the MDVI scenario, but over time moves to full integration. In fact, a 'moving' and dynamic element is also found in differentiated integration with regard to policy. For example, accession countries are differentiated from the Schengen Area and Eurozone in the first two years of membership; only after two years are they allowed to cooperate in these two policies (known as 'temporal differentiation').

It appears that, of all the new values introduced relatively late into the treaty discourse, the value of peace was the foremost to be embraced by the EU. This is evidenced by the relatively high and gradually increasing incidence of this value in the treaty discourse (Figure 1) and by its growing proximity to the EU entity since 1992 (Figure 2). Indeed, although peace does not figure extensively in earlier treaties, and never in association with the EU entity, keeping peace in the European region was one of the major motives for the creation of the EU at the outset. European identity, on the other hand, was introduced to the treaty discourse being attached to such entities as citizens and countries beyond the EU. On no occasion, however, in any treaty, is it attached to the EU entity. This appears to be a conscious and ingenuous strategy on the part of the EU, given that European identity is a highly politicised concept, whose boundaries and content are not straightforward or easily defined.

Concluding remarks: The building of the EU ethos

Integrating new norms and values presents a discursive challenge for any organisation. This article explored the EU's strategies to solve this dilemma. Based on the literature on institutional change, three hypotheses are suggested regarding the mechanisms that have hitherto been at the EU's disposal for assimilating new values to its constitutive text: deception, full integration and MDVI. All these hypotheses assume that the challenge of discursively accommodating change triggered by external and internal stimuli is homologous to the dilemmas in policy decisions faced by EU institutions.

Our findings support the MDVI hypothesis, which posits that different values are incorporated into discourse via different trajectories. Specifically, while well-established values are proximate in the text to the EU entity, new values are associated with other entities in and outside the EU. It is argued that this kind of differentiating mechanism for value integration enables the EU to manage, respond and adapt to change, while keeping intact its value identity, which is rooted in the core values of democracy and market economy. The MDVI scenario allows different readings of the treaty texts. On the one hand, the EU's identity is perceived as stable because it is almost invariably associated with democracy and market economy. On the other hand, new norms and values are introduced through textual changes, thus remolding Europe's normative image. This sophisticated discourse structure can be construed as being accepting of new values yet keeping them at bay so as not to compromise the EU's core values. Perhaps, what we witness is a type of 'discourse policy', which may or may not be pursued out of awareness, and which is consistent with a similar imperative in the organisational policy realm – that is, the aspiration to preserve continuity alongside with adapting the organisational behaviour to changing dynamics in the environment. Furthermore, it creates a hierarchy of values, such that a conflict is always resolved in favour of an old value: for example, if market economy clashes with social justice, the former prevails. A recent example is the Greece debt crisis, where the EU imposed neoliberal policies on Greece while ignoring uneven geographical development, thus downplaying or downright overlooking questions of socio-spatial justice (Hadjimichalis 2011). Findings also show that, while new values are initially textually marginalised (i.e., located far from the EU entity), they are subsequently integrated more dynamically: they appear more frequently in the text and are positioned in greater proximity to the EU entity as well as to other entities and values.

In a broad sense, this analysis examines a practice by which the EU builds its own image in its constitutive text through gradual assimilation of new norms and values. This process aligns with the Aristotelian conception of *Ethos*, defined as 'the speaker's personal character when the speech is so spoken as to make us think him credible' (Aristotle 2000 [1924], book 1, part 2). Such a theoretical framework accounts for the rhetorical rationale behind the EU's self-representation in discourse. The EU is in the business of constructing its own character as an evolving political entity by constantly updating its set of norms and values while at the same time upholding its staple principles of market economy and democracy. In this process of ethos construction, the Union as a 'speaking subject' shapes, constructs and reconstructs its image as a prudent reformer. This could be attributed to a number of reasons and motives. For one, the EU may be striving to maintain continuity in the way it is perceived as a political entity. Furthermore, some of these norms have been contested within

the EU, as well as outside it – as was especially the case three decades ago, when these values were first introduced into the EU text.

As argued previously, the discursive solution elaborated above may be a corollary of the EU's endeavour to solve its policy dilemma of whether to expand or deepen integration – striving for a compromise that would enable countries to opt out of certain policy implementations. As in its policy decisions, faced with a discursive predicament of integrating new values while maintaining coherence and 'speaking with one voice', the EU seems to have adopted the MDVI logic, which allows gradual and judicious change.

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Supporting Information

Additional Supporting Information may be found in the online version of this article at the publisher's web-site:

Table A1. Measure of inter-coder reliability (N = 100/400 paragraphs)

Table A2. Proximities between new values and entities

Custom Dictionaries for Values and Entities

Notes

1. Yet a considerable body of new evidence suggests that, despite the EU's normative-power talk, it often does not act in line with those values (see, e.g., Erickson 2013).
2. Note that, as discussed below, our textual analysis refers to 'European identity' as one component of a set of liberal-democratic EU values. This set of values also includes democracy, market economy, rights, social justice and peace.
3. These treaties are: Treaty of Paris 1951, Treaty of Rome 1957, Merger Treaty 1965, the Single European Act 1986, Treaty establishing the European Union 1992, Treaty of Amsterdam 1997, Treaty of Nice 2001, the Treaty establishing a Constitution for Europe 2004 and the Treaty of Lisbon 2007.
4. We focus on primary law to the exclusion of accession treaties.
5. Since each treaty in time *t* makes changes in earlier treaties, we were able to identify the changes made in time *t* in earlier treaties as we used the consolidated versions.
6. <http://orm.sagepub.com/content/early/2010/03/24/1094428109356713.short>
7. Dictionaries are annexed to the appendix.
8. These words were not evenly distributed across all categories because some categories were straightforward and did not need much elaboration, while others were more abstract and vague, and hence more words were included to delimit them.
9. Under the 1957 Treaty of Rome, goods, services, capital and people are supposed to be able to move freely across the Union's internal borders.

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