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STRATEGIC OBSERVATORY FOR EUROPE 2030: JEAN MONNET CENTRE OF EXCELLENCE SOE2030 AND ITS IMPACT

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Abstract

The main goal of Agenda 2030, the third and current strategic document of the European Union (EU), is to steer its development in pursuit of its Sustainable Development Goals. However, both policy research and policy practice have revealed a relatively poor implementation record of the EU grand strategy. The implementation of Agenda 2030 may be even more challenging, since it is not only an official EU grand strategy, but, more pervasively, a document accepted by the United Nations and whose implementation has global ambitions and also encounters many obstacles deriving their origin from beyond the borders of the EU. This promises that implementation and factors contributing to successes and failures of the EU grand strategies will remain an interesting research topic. In this article we present the possible application of Cultural Political Economy (CPE) approach in this research and present its application in the framework of Jean Monnet Centre of Excellence titled Strategic Observatory for Europe 2030 (SOE2030).

Keywords

Jean Monnet Centre of Excellence • Cultural Political Economy • Agenda 2030 • methodology • policy impact

1. Introduction

The subject of this article comprises the challenging and exciting issues of the implementation of the European Union's (EU) grand strategies, with a particular interest in the implementation of the current Agenda 2030 and its Sustainable Development Goals. We see this as particularly exciting topic, both as a research topic and as a policy issue. This is not merely due to the almost proverbial difficulties in implementing the joint strategy in a union of 27 very diverse countries, a union where the key institutions, despite decades-long institutional development, still lack the power – and the budget – relatively equivalent to those of the nation states. *Differentia specifica* is that Agenda 2030, unlike the Lisbon strategy and Europe 2020, is not a grand strategy developed for the EU, but a document developed and accepted by the United Nations, albeit with a very significant impacted by the EU. In this process, the EU has recognised the fact that many of the major issues that the EU is facing are global in their nature and should be tackled not only by the EU, but also beyond its borders, on a global scale. Some of the global issues with a profound impact on the EU are the climate change, illegal migration and, not least, war in Ukraine, which is impacting the European and global energy market, affecting food supplies and perhaps also leading to reorganisation of global geopolitical alliances, as well as the flows of energy, food, industrial components etc. Some of the challenges have such a strong short-term impact, that already accepted strategic priorities and decisions are being questioned and re-examined, for example the decision of Germany to close nuclear power plants and scale down the coal-powered power plants.

The implementation of the EU grand strategies is a phenomenon that has already been the subject of intense interest from both researchers and policymakers (Makarovič et al. 2014; Haverland and Romeijn 2007; Borghetto and Franchino 2010). The most researched is the Lisbon strategy, which concluded in 2010. However, a significant number of publications on the impact of Europe 2020 already exists (Stec and Grzebyk 2018; Makarovič et al. 2014). This research points to significant discrepancies in implementation among the Member States. Some of the divisions are between Northern and Western Member States on one hand and Eastern and Southern ones on the other

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(Wüst and Rogge 2022; Kasprzyk and Wojnar 2021), but others may be discovered, and the reasons for them could be unveiled in future research.

One possible approach in this research is the Cultural Political Economy (CPE) approach, based on evolutionary mechanisms of variation, selection and retention of dominant discourses (Jessop 2004; Jessop 2010; Jessop and Oosterlynck 2008), as well as on mechanisms of selectivities (Sum and Jessop 2014). This has already been used in research on implementation of Europe 2020 (Rončević and Besednjak Valič 2022; Makarovič et al. 2014). It was also the theoretical foundation of Jean Monnet Centre of Excellence 'Strategic Observatory for Europe 2030' (SOE2030), which is presented in this article.

This collection of six articles in the thematic issue of this journal is one of the first efforts to scratch the surface of the implementation of Agenda 2030 with CPE, although more systematic research is yet to follow, including analyses on the basis of data collected during the SOE2030.

2. The Ambition of SOE2030

SOE2030 tackles an important policy issue and at the same time provides academic value-added. The EU has been continuously rethinking its global position amidst emerging economic and geopolitical challenges and rivals – as the war in Ukraine has brutally revealed – and attempting to formulate strategies to increase its competitiveness (Makarovič et al. 2014).

This is the topic of Jean Monnet Centre of Excellence titled SOE2030. We detected the need to develop such a centre as a focal point for competence and knowledge on development and implementation of EU long-term strategy till 2030. Capitalising on past Jean Monnet Chair *Cultural Political Economy of Europe 2020* (CPE2020, 2016–2019), SOE2030, first, advanced research on EU by setting up scientific infrastructure to collect, analyse and disseminate knowledge on EU strategic processes. Secondly, it is serving as the forum for multi-level debate on EU strategic development between academia, students, professionals, policymakers, businesses and civil society. These were, finally, to be used to upgrade teaching on EU topics on host institution and beyond.

The EU recognised the importance of long-term strategising by adopting, implementing and monitoring the Lisbon Strategy (2000–2010) and Europe 2020 (2010–2020). It has reaffirmed this long-term approach by making a positive and constructive contribution to United Nations' 2030 Agenda for Sustainable Development, which were ultimately accepted also as the EU strategic frameworks for the period till 2030, to respond to key global and European challenges such as demographic changes; digitalisation of society; environmental challenges; inclusion and citizenship; investment, reforms and governance; and technological change and the future of work. This clearly indicates that the EU is not only continuing its current pursuit of strategic approach to smart, sustainable and inclusive growth, as outlined in Europe 2020, but also proceeding to fulfil its ambition to have a global impact in achieving Sustainable Development Goals.

SOE2030 capitalised on the activities of Jean Monnet Chair CPE2020, which was focussing on impact of structural, discoursive and technological factors on implementation deficit of the EU grand strategies, especially Europe 2020. SOE2030 complemented and upgraded the Chair, firstly, by upgrading methodology to add a particular focus on the study of processes of variation, selection and retention of strategic discourses (e.g. through key long-term strategic documents and policies of the EU), and secondly, will focus on development and implementation of forthcoming long-term strategy till 2030. SOE2030 was based on the following:

(i) Open Innovation 2.0, an emerging paradigm where academia, policymakers, industry and civil society co-create the future and drive structural changes;
(ii) Open Source model, drawing from and contributing to knowledge freely available to the public; and
(iii) Theoretical and conceptual background of CPE, an emerging approach that not only theoretically explains the mechanisms behind successful implementation of grand EU strategies, but can also be instrumental in providing the relevant empirical analytical tools. SOE2030 engaged a variety of target groups in its activities, i.e. academia, students, professionals, policymakers, businesses and civil society.

3. Methodology

Although SOE was an interdisciplinary project involving multiple activities, research was one of the key points. It has provided the groundwork for state-of-the-art interdisciplinary research on the topic of formulation and implementation of long-term grand strategies of the EU, which has not been explored systematically, but only partially and from different insufficiently interdisciplinary perspectives.

Research itself included the following tasks:

(i) Collection and systematic review of available research, information, knowledge and secondary empirical data on variation, selection and retention of dominant strategic discourses on various levels within the EU, leading to established grand strategic visions, as well as on mechanisms of structural, discoursive, technological and agential selectivities in development of these grand strategies.
(ii) This review was be the basis for development of methodology, protocols and tools to collect the primary data on

European, national and regional levels. The data focussed primarily, but not exclusively, on the processes of variation, selection and retention of dominant ideas and the mechanisms by which these ideas become part of long-term strategies of the EU. It is a mixed-method approach, collecting primarily (but not exclusively) qualitative data of different types and sources, which allow advanced qualitative comparative case study analysis, as well as very-small-N comparative case studies. Collected qualitative data are primarily based on semi-structured interviews and/or focus groups, which employ specific additional questions, designed to collect data for qualitative comparative analysis (fuzzy-set analysis).

(iii) We tested the methodology by collecting the qualitative data on European and international levels. First, the international level is relevant due to major contribution of the EU to the UN 2030 Agenda for Sustainable Development; more generally due to attempts of the EU to make a positive contribution to the global agenda; and particularly due to the role of the EU in determining national and regional strategies (for example, through Smart Specialisation Strategy). Second, we collected data at the EU level in key EU institutions in Brussels and EU-level stakeholder representations. Finally, to account for EU global visions in response to global geo-strategic challenges, we collected data in a sample of countries relevant from the perspective of the EU Global Strategy (USA, Russia, Thailand). Results were also used to assess and further refine data collection methodology, for other researchers who will decide to study strategic processes for the purpose of their own research.

(iv) The data are stored on the online platform of SOE2030. Following the crowdsourcing approach, the platform is providing access to collected data to interested experts, with full access given to those researchers contributing their own primary data. SOE2030 will continue to review all submitted data to ensure consistency of the data collection process with developed protocols and maintain the highest standard of quality.

In our research we are able to triangulate:

(i) conclusions based on literature review and analysis of secondary empirical data;

(ii) qualitative data collected through semi-structured interviews and focus groups with stakeholders on European, national and regional levels; and

(iii) qualitative comparative analysis (fuzzy-set analysis) that has been conducted on the basis of both secondary and primary data; fuzzy-set analysis was selected since it is especially appropriate for analysis of ambiguity and complexity.

This comparative methodology offers 'interpretative algebra' (Ragin 2000, 2008; Ragin and Pennings 2005), an approach that takes both conceptual and empirical aspects into account, thus enabling social scientists to employ dialogue between ideas and empirical evidence (much-desired systematic interplay between theory and data analysis). Furthermore, it is a case-oriented method and enables analysis of smaller populations than conventional variable-oriented statistical research, and is therefore especially relevant for comparative research on EU countries.

The selected methodology can be carefully tailored to fit theoretical concepts, which is especially important due to underdevelopment of this particular aspect of EU studies.

SOE2030 thus developed a transferable data collection tool to collect qualitative and fuzzy-set data on variation, selection and retention of dominant discourses leading to established grand strategic visions, as well as on mechanisms of structural, discoursive, technological and agential selectivities on European, national and regional levels.

4. Academic Value-Added

SOE2030 has the ambition to become the focal point for competence and knowledge on development and implementation of European long-term strategy till 2030. It is interdisciplinary, pooling expertise on EU from sociology, political science, economics, law and regional studies.

To achieve this objective, SOE2030 firstly set up infrastructure, methodologies, protocols and tools to systematically collect, evaluate and make publicly available both already existing documentary resources and new primary empirical data, both qualitative (semi-structured interviews, focus groups) and quantitative (relevant statistics), on European strategic processes. Secondly, this was to be the foundation for a multi-level policy debate with relevant stakeholders and audiences (conference special sessions, joint field trips and round table discussions). Research and policy debate, thirdly, enabled us to complement and upgrade current courses and curricula on EU topics, as well as develop new ones (course modules, summer schools, workshops). These activities were carefully interwoven to incorporate principles of integrated collaboration, co-created shared value and rapid adoption of the strategic vision of successful, smart and inclusive growth.

SOE2030 is planned to achieve maximum impact with available resources by utilising the existing host institution's infrastructure and activities whenever possible. This is not only economically efficient, but will also allow avoiding unnecessary new content loading in addition to already existing one. Therefore, relevant fields of EU studies (from sociology, political science, economics, EU law, regional studies) will be integrated where appropriate in the existing research, curricula and events.

To increase its impact and to cross-fertilise with other Jean Monnet activities and EU competence centres, SOE2030

linked with other institutions both in Slovenia and beyond, by including current and past Jean Monnet Module, Chair and Centre of Excellence holders as key staff members, or by inviting them to participate through guest lectures and as speakers at research and dissemination events.

SOE2030 will continue to regularly monitor its impact and achievements using quantitative performance indicators (e.g. number of organisations involved in activities; number of courses upgraded; number of participants at events; number of young scholars engaged in active way). These will be amended with qualitative assessment conducted by national experts for quality assurance in higher education.

SOE2030 is designed to achieve the maximum benefit per unit of available resources. This also includes maximisation of the relevance of this proposal for the specific objectives of Jean Monnet Centres of Excellence. We shall continue to blend activities of SOE2030 with other events at host institutions to the greatest possible extent, and by providing a 'clever' combination of research infrastructural development, including development of relevant methodologies, protocols and data collection tools, and educational activities at BA, MA and PhD levels of studies, as well as the winter camp workshops and summer schools, and outreach events, we aim to encourage synergistic effects and to achieve 'more with less'.

Firstly, Jean Monnet Centre of Excellence SOE2030 will continue to gather the expertise and competencies of high-level experts in the field of EU studies. This includes, first, current and former holders of Jean Monnet Module, Chair or Centre of Excellence. These experts will contribute expertise on the EU from perspectives of sociology, political science, EU law, economics and regional studies. Secondly, we will also, in the future, invite experts in relevant aspects of EU studies to deliver lectures on various topics pertaining to the EU strategic processes during SOE2030. Thirdly, we will identify and invite additional experts in relevant areas of EU studies in the continuing development of infrastructural framework for SOE2030 and then engage them during its various activities, among others through multi-level policy debates organised during the series of thematic events, workshops and conference special sessions, and during the thematic field trips. A number of high-level experts are expected to participate in planned activities. Here we are not referring only to EU experts from academia; we also aim to attract high-level professionals from consultancy, public administrations and civil society.

Secondly, SOE2030 is designed to collect existing resources, with the purpose being to develop synergies between various disciplines and resources in EU studies. In fact, one of the key activities of SOE2030 was to set up research infrastructure, including development of methodologies, protocols and tools to systematically collect, evaluate and make publicly available both already existing documentary resources and new primary empirical data on EU strategic processes from a wide variety of disciplines (sociology, economics, EU law, political science, regional studies). SOE2030 will continue to provide a one-stop-shop for a variety of resources on the topic and, additionally, as a result of its carefully designed and interwoven activities, SOE2030 will allow and enhance their cross-fertilisation and capitalisation.

Thirdly, SOE2030 will also, in the future, ensure openness of EU strategic processes to civil society. Firstly, this will be implemented by encouraging debates across boundaries of academia, businesses, public administration and the civil society, thereby allowing democratic participation in high-level debates on the issues of utmost importance to development of European societies; secondly, by ensuring representation of these sectors in its outreach activities; and finally, by following an open source approach, and providing the general public with open access information on development and implementation of EU long-term strategies. As a result of openness to civil society, SOE2030 will continue to contribute to the EU strategic processes in open public space, recognising the ubiquitous and multi-level nature of the policy process at stake, i.e. the development and implementation of long-term strategy of EU till 2030, for example by encouraging multi-level debates and involvement of key stakeholders at these levels.

In addition to these main specific objectives, SOE2030 will continue to follow two additional specific objectives. Firstly, it will specifically encourage, advise and mentor the young generation of higher education teachers and researchers in EU studies. SOE2030 will continue to include young scholars with an interest in EU studies at the beginning of their academic careers as part of the key academic staff, to contribute to future (re)design of this Centre of Excellence and will continue to work on its implementation, under supervision of their senior colleagues, including current or former holders of Jean Monnet Module, Chair or Centre of Excellence. They will be supervised by two senior colleagues on the basis of their specific expertise. They will, hopefully, be dealing with a variety of topics that lack experts, such as the intersection of political science and EU law, or the intersection of sociology, economics and regional studies, thus covering disciplines relevant for SOE2030. Furthermore, various outreach activities of SOE2030, such as conference special sessions, workshops, special debates, summer schools and field trips, will actively encourage participation of junior colleagues.

Secondly, SOE2030 will continue to organise a large number of activities designed also to target policymakers at local, regional and national level as well as civil society. This is, in fact, a necessary condition for successful continuation of this project, since this Centre of Excellence is dealing with multi-level policy process, in which a number of stakeholders on a

variety of levels, from local to European, play important roles and in which we are focussing on the variation, selection and retention of EU strategic discourses on the future development of the EU. These events will be regular winter camps with participation of students, young professionals and academics; multi-day joint international field trips with participation of all target groups; special thematic sessions forming part of conferences that will enable scientific scrutiny of the results; and round tables organised to enable a more applied scrutiny of the SOE2030 process by industry representatives and policymakers. In this entire process, to achieve objectives and engage target groups, SOE2030 will continue to systematically incorporate principles of integrated collaboration, co-created shared value and rapid adoption.

5. Conclusion

As a result, SOE2030 will continue to advance interdisciplinary EU studies and deal with the phenomenon of EU implementation deficit, with a view to continue to offer research and educational tools that could be utilised throughout Europe, to contribute to creation, awareness and implementation of EU grand strategies. By doing so, SOE2030 will directly respond to the future need to develop this particular field of EU studies, which was repeatedly identified by an increasing number of scholars (Šušteršič, Makarovič, Kuklinski, Galar etc). We will do so by adopting the analytical framework of CPE, a rapidly developing sociological approach, which has yet to touch systematically on the EU studies and on more applied interdisciplinary social research, such as that on development and implementation of long-term strategies.

Apart from providing academic value-added in the field of EU studies, SOE2030 is tackling an important policy issue. The EU has been continuously rethinking its global position amidst emerging economic and geopolitical challenges and strives to contribute positively on a global level. However, long-standing policy implementation deficit of the EU is also recognised for its grand strategies. Although implementation tools are improving, for example through Smart Specialisation Strategy mechanisms, there exists a potential for failure of the forthcoming long-term strategy of the EU till 2030 to establish itself and not becoming sufficiently influential in shaping local, regional and national strategic agendas and policies. Excellent knowledge on this topic is one of the key necessary conditions to reduce implementation deficit on local, regional, national and European levels.

Last but not least, this SOE2030 is intended to have both academic and educational impacts, and accordingly it will cater to the interest of both EU studies researchers and teachers, students of EU studies, and policymakers, as well as the general public. It will continue to deal with insufficiently explored areas within the EU studies. It will be of a particular importance to the academics working with the CPE approach. It is the demonstration of analytical robustness of this approach and original contribution in terms of data collection protocols for this particular approach.

SOE2030 was finally concluded at a time when the EU is starting to implement its next strategy, The Agenda 2030 and its Sustainable Development Goals, covering the period 2021–2030 and when the academic and policy communities as well as the general public will be reflecting on the implementation of the previous one, Europe 2020. This journal special issue is one of the first systematic contributions discussing the topic.

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