

# COPE

## Covering Cohesion Policy in Europe

### Training Materials for European Journalism Students

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# COPE.

Covering  
Cohesion Policy  
in Europe



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## Foreword to this E-book

Over the past 1,5 years, the COPE consortium has built a 27-country Massive Open Online Course (MOOC) teaching coverage of EU issues to journalism students across Europe. The MOOC addresses journalism educators and institutes across Europe as well as newsrooms looking for training options and individual journalists.

The MOOC – produced by journalism institutes in 27 EU member states - will help journalism students understand policy-making in Europe and tap on relevant data and sources. The COPE MOOC is available in all EU languages. Selected modules have “local windows” providing country-specific contents. The consortium shares one goal - promoting even more cross-border collaboration and professional coverage of European issue in a future generation of European journalists. The COPE MOOC is co-funded by the European Union with a budget of 1 Mio. Euro in order to facilitate the production of content of all 14 modules, the translation, and the technical set-up of 27 national MOOCs.

**This E-Book gathers all contents provided in the COPE MOOC, to make the teaching materials accessible to journalism educators, journalism students and media practitioners beyond the digital version. We hope this E-Book will inspire creative use of our materials in teaching across Europe - and beyond!**

A comprehensive set of 14 modules (one semester) will enable journalism educators across the EU to systematically teach journalism students to better understand the functioning of EU institutions and the complex factual dimensions of Cohesion Policy in the EU. Journalism students will also learn how to practically translate this knowledge into sound and sensitive, yet critical and challenging multi-media reporting techniques addressing local audiences. Our course will make a special effort to train journalism students in finding the regional angle in EU coverage, to make coverage relevant for local audiences, and act as watchdog to cover and assess the spending of cohesion funds by local actors in the regions across the EU.

Journalism educators will be substantially supported by experienced scholars (from the field of political science, mainly public policy and European studies) dealing with Cohesion Policy and EU policies in general, both in the process of the preparation of course modules and the implementation of the curriculum. Thus, an interdisciplinary approach is key for this project.

We would be happy to hear from you about your experiences with our teaching materials!

Best regards from the COPE team!

For the COPE consortium

Prof. Dr. Susanne Fengler  
Isabella Kurkowski  
Richard Brandt  
Juliane Niepert

Dortmund, April 2024





## How to use this E-book

This E-book is available in English. However, contents are also available online as interactive component (see: <http://cope-journalism.eu/mooc/>) in all EU languages.

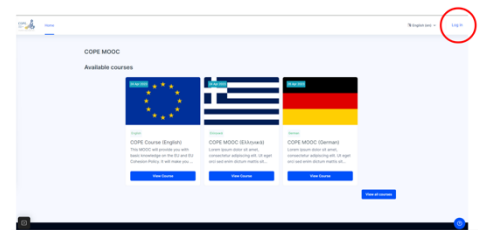
Videos can be accessed by the reader by using the given links, all videos are subtitled.

Sample solutions to exercises are provided at the end of each module. Further literature and recommendations are provided in each module for lecturers as well as students.

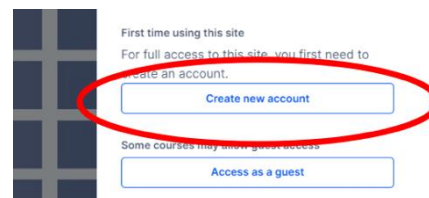
## How to access the MOOC online

Step 1: Visit <http://cope-journalism.eu/mooc/>

Step 2: Click the login button on the top right corner →



Step 3: Click the “create new account” button →



Step 4: Fill in the form →

**Create a new account**

Username

The password must have at least 8 characters, at least 1 digit(s), at least 1 lower case letter(s), at least 1 upper case letter(s), at least 1 special character(s) such as \*, -, or #

Password

Email address

Email (again)

First name

Last name

City/town

Country

Step 5:

- An email should have been sent to your email address.
- It contains easy instructions to complete your registration.
- Please also check your spam folder.
- If you continue to have difficulties, please contact the administrator on the Website: <https://cope.csd.auth.gr/mooc/>

Step 6:

- Read the email and confirm the URL sent. The e-mail should look like this:

- Hi,

A new account has been requested at 'COPE MOOC' using your email address.

To confirm your new account, please go to this web address:

In most mail programs, this should appear as a blue link which you can just click on. If that doesn't work, then cut and paste the address into the address line at the top of your web browser window.

If you need help, please contact the site administrator,

Admin User

Step 7: Your account is successfully created!

# Module 1: Introduction

## Basic Information

Module number	1
Module title	Introduction
Duration/study load	4 hours
Keywords	Introduction; EU Cohesion Policy; Media/Journalism; Didactics, Learning Taxonomy; COPE Team; Features
Learning outcomes	<p>At the end of the module, ...</p> <ul style="list-style-type: none"><li>• Students should recognize the relevance, context, and implication of EU Cohesion Policy issues / the MOOC.</li><li>• Students should be able to describe the key topics in the field of covering EU issues from a journalistic-professional point of view.</li><li>• Students should develop a playful attitude and emotional involvement to the topic of EU Cohesion Policy.</li><li>• Students should test and demonstrate their current knowledge about EU institutions.</li><li>• Student should recognize the background of the MOOC and the authors, who produced it.</li><li>• Students should demonstrate that they are able to work independently with the MOOC/tools on the MOOC.</li></ul>

Description	<p>Module 1 is an introduction to the MOOC. It will incentivize participants with an overview of key topics and lay out didactic techniques.</p> <p>You get an initial idea of the relevance, context and implication of EU Cohesion Policy issues in the context of the status and future of the European Union; test their knowledge about EU institutions; understand the relevance from a journalistic-professional point of view; understand the need to address the topic in a cross-border collaborative perspective; and develop a spirited attitude and responsive involvement in the MOOC.</p> <p>You get to know the content structure and the didactic concept of the MOOC. They will understand how to make use of the MOOC's features and the "local windows" concept. They will also understand how reading the suggested literature and further "homework" is connected to the MOOC, in order to earn the ECTS credits projected for the MOOC.</p> <p>You are made familiar with the consortium members who have produced the MOOC. A brief introduction to a wide variety of subject areas is supplemented by short practical exercises.</p>
Sequentiality	<p>This module provides the basic information to work in the MOOC. It should be done before working in another module.</p>
Contact to the author	<p>Anna-Carina Zappe, Susanne Fengler, Isabella Kurkowski, Richard Brandt  TU Dortmund, Institute of Journalism  <a href="mailto:susanne.fengler@udo.edu">susanne.fengler@udo.edu</a></p> <p>Co-author: Juliane Niepert</p>

## Glossary

<p>EU Cohesion Policy</p>	<p><b>EU Cohesion Policy</b>, also referred to as Regional Policy, aims at improving the economic well-being of regions in the EU, by reducing economic, social and territorial regional disparities, with emphasis on restructuring declining industrial areas and diversifying rural areas with declining agriculture. The policy, with more than one third of the EU’s Budget is devoted towards making regions more competitive, by fostering economic growth and by creating new jobs. It has evolved from a tool to counterbalance the regional disparities inevitably emerging from the Single Market, and, subsequently, from the Monetary Union to the investment pillar of the EU. <b>EU Cohesion Policy</b> incorporates strategic objectives of smart, sustainable and inclusive growth by investing in key areas such as: research and innovation, support for small and medium enterprises, the low-carbon economy, employment and mobility, better education, social inclusion and better public administration. The policy also has a role to play in wider challenges for the future, including digitalisation, climate change and energy supply.</p> <p>Source: <a href="#">European Investment Bank, 2023</a></p>
<p>Eurobarometer</p>	<p><b>Eurobarometer</b> is the polling instrument used by the European Commission, the European Parliament and other EU institutions and agencies to monitor regularly the state of public opinion in Europe on issues related to the European Union as well as attitudes on subjects of political or social nature.</p> <p>Source: <a href="#">European Union, n.d.</a></p>
<p>Horizontal Europeanisation</p>	<p><b>Horizontal Europeanisation</b> is a European public sphere “in which Europe's citizens discuss issues of equal relevance at the same time”</p> <p>Source: Lönnendonker, 2018, pp. 130–131</p>
<p>Principal-agent problem</p>	<p>The <b>principal-agent problem</b> is a conflict in priorities between a person or group and the representative authorised to act on their behalf. An agent may act in a way that is contrary to the best interests of the principal.</p> <p>See for an extensive definition Module 8.</p> <p>Source: <a href="#">Investopia, 2023</a></p>
<p>Taxonomy</p>	<p><b>Taxonomy</b> is a classification or categorization</p> <p>Source: <a href="#">European Commission, n.d.</a></p>
<p>Vertical Europeanisation</p>	<p><b>Europeanisation</b> of national publics, which frequently depends on the topic</p> <p>Source: Kaiser &amp; Kleinen-von KönigsLöw, 2017, p. 800</p>

## Acronyms

COPE	Covering Cohesion Policy in Europe – Training MOOC for European Journalism Students
ECTS	European Credit Transfer System
EJTA	European Journalism Training Association
EU	European Union
Eurostat	Statistical office of the European Union
MOOC	Massive Open Online Course

## About this module



Figure 1: Journalistic coverage on EU Cohesion Policy; Source: Freepik

This introductory module will give you an overview of the contents related to journalistic coverage on EU Cohesion Policy, and the structure and didactics of this MOOC. The module wants to show you how relevant - and exciting - research and coverage of EU issues can be. A first journalistic exercise will help you to jump-start into the matter. Have fun!

## About this MOOC

This MOOC will provide you with basic knowledge on the [EU](#) and EU Cohesion Policy - which is one of the most relevant areas of EU spending: Approximately a third of the EU's public funds are invested in EU Cohesion Policy! It will make you aware of best practices in EU coverage, and opportunities missed by the media. The MOOC will help you understand policymaking in the EU and tap on relevant data and sources. And most important: The MOOC will train you to collaborate with journalists in other EU countries, in order to give your audience the full picture— the European dimension — of the story. This is why a consortium of journalism institutes, journalism departments and journalism associations from across Europe is behind this MOOC. We will introduce you to our team a bit later in this first module.

The term EU Cohesion Policy may sound rather abstract and technical. In political and social sciences, political cohesion is understood as "the commitment to a common political project" (Bonotti 2019, p. 287). What it means in political practice is of special relevance for you - the younger generation of Europeans. Indeed, EU Cohesion Policy is also the EU's key instrument to implement the Green Deal, aiming at a net zero EU by 2050. Students in the EU may also be the most knowledgeable people when it comes to concrete personal experiences with EU funding: Erasmus+ is the most popular of all EU financial programs!

**Watch now:** [Introduction video](#)

## Funding of this project

This MOOC has been co-funded by the European Union in 2023 and 2024 with a budget of €1 million. This budget facilitated the production of content of all 14 modules, the translation, and the technical set-up of 27 national MOOCs, addressing journalism students like yourselves in all EU member states. The COPE consortium as implementer behind this MOOC is, however, fully independent in all its editorial and other assorted decisions. The consortium also considers professional educational approaches in journalism across Europe like the [Tartu Declaration](#). We intend to train future journalists who investigate and cover all actors and institutions in the European process comprehensively, critically and professionally.

## Goals, structures and target groups of this MOOC

One of the first actions we took when planning this project was a survey among journalism institutes, organised in collaboration with the European Journalism Training Association (EJTA), conducted in 2023. It is an unpublished survey by EJTA within its own, more than 80 members. It was presented at three EU Commission seminars in Brussels in 2023. The research answers the question:

Does your curriculum include training in coverage of EU issues?

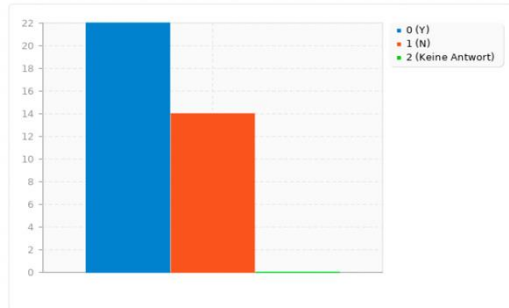


Figure 2: The implementation of coverage of EU issues in journalism schools; Source: TU Dortmund University/own survey

Do journalism schools teach coverage of EU issues? This would certainly be a prerequisite for a knowledgeable journalistic workforce across EU member states. However, the answer was somewhat surprising for us, given the eminent role the EU plays in the decision-making and development of our continent: While two-thirds of our respondents agreed, there was still a third who said that their curriculum does not include training of EU issues.

Survey among journalism institutes about the implementation of coverage of EU issues in journalism schools.

This comprehensive set of 14 specifically to journalistic educational needs-developed modules will enable you to better understand the functioning of EU institutions and the complex factual dimensions of EU Cohesion Policy in the EU. You will learn how to practically translate this knowledge into sound and sensitive, yet critical and challenging multi-media reporting techniques addressing local audiences. The COPE MOOC will make a special effort to train you in finding the regional angle in EU coverage, to make coverage relevant for local audiences, and act as a watchdog to cover and assess the spending of cohesion funds by the various actors in the regions across the EU. In order to foster cross-border co-operation, our MOOC makes a point of training journalism students in collaborative techniques of EU coverage and provides you with inspiration how to connect to fellow European students.

**Watch now:** [Goals of this MOOC video](#)

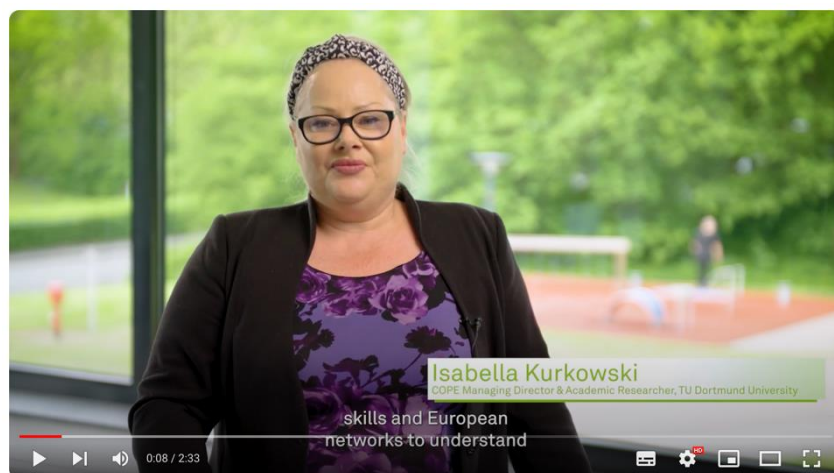


Figure 3: Video - Goals of this MOOC; Source: COPE production



## **We want you to connect!**

The MOOC wants to engage with you on all levels. We want to arouse your curiosity in EU issues and show you exciting ways to research and cover EU issues. We want to share with you our passion for pan-European co-operation and make you feel at home in the architecture of European institutions.

To this end, this MOOC will invite you to use a multitude of interactive elements to engage you with this topic: From basic drag-and-drop exercises to test the knowledge you just acquired in the module, to interactive scenarios—a core group of E-Learning specialists within our team has made sure that you can expand your competencies step by step, and follow your own path through the modules and materials. Each module tells you clearly the key learning outcomes we hope to bring about.

On your journey through this MOOC, you will also meet virtual characters – like Socrates and his dog Cookie. They are young journalists like you, from around the EU. They conduct research on EU matters, develop story ideas on EU Cohesion Policy, and so on, like you. We invite you to immerse yourselves into these situations, to explore and overcome the real-life challenges of professional journalists covering EU issues. Each module will produce new virtual characters, so expect to make a number of new virtual friends during the course of these 14 modules!

**Watch now:** [Video about the didactic structure of this MOOC](#)



*Figure 4: [Video about the didactic structure of this MOOC](#); Source: COPE production*

## **Easy self-paced work**

This self-paced MOOC has a user-friendly layout and an innovative interface. Easy to understand lessons and clearly formulated exercises make independent work possible for anyone interested in learning about EU Cohesion Policy. The simple and internationally recognised navigation symbols and structure ensure your familiarity with the MOOC.

A variety of technological features enables the MOOC to offer a high degree of flexible usage. Although the overall design involves a linear learning progress, flexible work is also possible in all 14 modules and throughout the MOOC. The navigation bar allows you to switch back and forth not only between modules but also each module's slides, so you can review the content and repeat the exercises. Furthermore, internal links make it easy for you to find content anywhere within the MOOC. External hyperlinks connect your knowledge search with relevant websites across the

Internet. Various types of evaluation, for instance, quizzes with feedback and exemplar solutions are designed to pique and maintain your interest.

To help you organise the evolution of your learning, each module has an integrated overview of the progress of the MOOC. Each module also indicates on the first page, the scheduled study load, which varies from 4 to 8 hours. By the time you've completed all 14 modules, over the expected 14-week period, you will have accumulated a maximum of 108 hours of active learning. This is equivalent to a study load of 4 ECTS credits for the MOOC.

The MOOC allows journalism educators, if they use the content in seminars that are not based on self-paced learning, to implement collaborative elements for classroom work. The MOOC also advises you how to connect with other journalists via recommended platforms.

While the contents of this MOOC have been developed bottom-up, from basic to special, you are by no means obliged to take the MOOC module by module. Instead, we warmly invite you to navigate your own path through the knowledge and skills we hope to convey via this platform. You can also always leave the platform and come back to the module you have been working on.

**Additional information for journalism educators** (skipping option for journalism students)

[Krathwohl's and Anderson's revision of Bloom's \(1956\) "pyramid"](#) visualizing the process of successful learning has guided us in the development of this MOOC's contents:

- We foresee to make users **understand** basic concepts of EU policy making in Modules 2 to 5. The role of the media is an essential factor for a lively debate on European issues, and we want users to **remember** key research results on news selection and the media impact on people.
- Modules 6 to 12 encourage users to **analyse** the impact of decisions taken by EU, national and local policy-makers – how do they affect local citizens and economies? And do they produce satisfying results? We will of course support you to **apply** the knowledge and skills you have already gathered by joining you on a research mission, as well as tapping into big data.
- Modules 13 and 14 will help users to train their **creative** skills as a professional journalist. Users will develop an actual 'pitch' for a story on EU matters, defend it in a virtual newsroom conference, and be encouraged to consider working together with colleagues from other European countries to **evaluate** the news worthiness of their story beyond their own "bubble".

## Bloom's Taxonomy

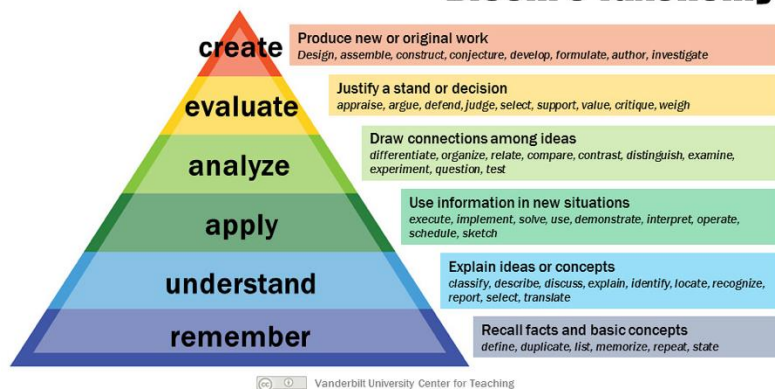


Figure 5: Bloom's taxonomy by Anderson and Krathwohl from 2001; Source: Center for Teaching Vanderbilt University/Flickr

### Students' learning – taxonomy of cognitive processes

### Scholarly expertise and interdisciplinary approach

Journalism educators who will use this MOOC will be substantially supported by experienced scholars (from the field of political science, mainly public policy and European studies) dealing with EU Cohesion Policy and EU policies in general, both in the process of the preparation of course modules and the implementation of the curriculum. Thus, an interdisciplinary approach is key for this project.

Training journalism educators in Europe to co-create the MOOC, actively use it in classroom teaching and distance learning, and integrate it in local curricula will be at the core of this project.

Module 1, this introductory module, should take users no more than four hours to work through. Users of the MOOC should take eight hours for each of the other modules (except Module 14, also corresponding with four hours of work).

### Training materials

A set of ready-made PowerPoint presentations (PPTs) will accompany the MOOC as offline material for journalism educators. The PPTs will enable journalism educators to teach the 14-module course at the Bachelor level with the help of this multilingual training manual. Journalism educators may download fully developed slide sets for 14 lectures (one semester) from the project website for accompanying or intermediate classroom teaching, and freely adapt them to their specific local needs and purposes.

We project 4 ECTS credits for this course, but educators can of course reduce or adapt the workload, also with additional material regarding their local needs and purposes. The MOOC will furthermore address the media industry across Europe to train junior newsroom staff in covering EU matters, as well as other educational institutions. Our aims are that the modules will be attractive for in-house trainings in European news media outlets and media institutions as well.

## Fact-checking EU news

The COPE MOOC will also connect you to the fact-checking project [EUFACTCHECK](#) - a project EJTA had started for the 2019 European elections. The goal of EUFACTCHECK is to raise awareness of the importance of fact-based reporting with European journalism students, by building a sustainable curriculum unit, stimulating reflection, and providing educational material and a common methodology in fact checking. This project underlines the view that in times of rapid journalism and the intensified struggle for the news consumer's attention, a fair and balanced representation of Europe in national media is a growing concern. Journalism should promote the public's understanding and critical evaluation of EU policies. Journalists should analyse EU politics and show the interrelatedness of the local/regional, the national, the European and the global.

After the elections to the European Parliament, the [EUFACTCHECK](#) project continued, and new schools joined. An editorial team, comprising journalism educators from four journalism schools, ensures a constant flow of publications on the website and offers support to journalism lecturers.

## Who produced and supports the MOOC?

The MOOC's production team consists of six journalism institutes and departments from EU universities – these are AP University of Applied Sciences and Arts (Belgium), Aristotle University of Thessaloniki (Greece), Babes-Bolyai University (Romania), TU Dortmund University (Germany), the University of Porto (Portugal), and the University of Wroclaw (Poland) - plus the European Journalism Training Association (EJTA) and the renowned journalists' initiative Arena for Journalism in Europe (ARENA).



Figure 6: The COPE-team; Source: TU Dortmund University/Anna Klinge

The coordinator is the Institute of Journalism at TU Dortmund University (Germany), bringing in a track record in international coverage, economics and policy journalism, and numerous prior E-Learning projects. The partnership with ARENA anchors the MOOC firmly in state-of-the-art European newsroom practices and actual media industry needs. The MOOC will also generate best practice cases for outstanding journalistic research and multi-media reporting of EU matters. Get to know all the team members involved in the MOOC on our [COPE website!](#)

## About the European Journalism Training Association (EJTA)



Figure 7: EJTA Logo; Source: European Journalism Training Association (EJTA)

Established in Brussels as a non-profit organisation in 1990, [EJTA](#) groups about 80 journalism centres, schools and universities from some 30 countries across Europe. EJTA serves as the platform for this MOOC project. As part of a dissemination plan, further higher education institutions are to be acquired for the active use of the MOOC in their journalism curricula.

The aim of EJTA is to stimulate European co-operation in journalism education, and to further develop professionalism in journalism training. The members work together to improve journalism education in Europe, enabling members to collaborate on curriculum development, international exchanges, cross-border teaching and research projects. Members meet regularly to exchange ideas and information. All members also subscribe to EJTA's [Tartu Declaration](#), of which the preamble states that members of EJTA educate or train their students/participants from the principle that journalists should serve the public by:

- providing an insight into political, economic and socio-cultural conditions.
- stimulating and strengthening democracy at all levels.
- stimulating and strengthening personal and institutional accountability.
- stimulating and strengthening an open and respectful public conversation.
- strengthening the possibilities for citizens to make choices in either or both societal and personal contexts.

This MOOC connects journalism students like yourselves - and journalism educators using the MOOC - to a network of journalism schools across EU member states. These journalism schools have been partners in this MOOC project. They've contributed either full modules or local flashlights on national policy practices and media ecosystems, and of course providing translation in all 24 languages of the EU. All partners who have helped to create this MOOC also participated in the pilot-teaching of the 14 modules presented here.

The local windows are always integrated in Module 4, 6, 7, 9 and 11 in all COPE MOOC language versions available online at <http://cope-journalism.eu/mooc/>. Examples of local windows related to Germany and its EU Cohesion Policy developed by Marcus Kreutler and Johanna Mack can be found in Module 6 and Module 7 of the German online version of this MOOC.

Overall 26 other local window examples from different EU countries on EU Cohesion Policy can be accessed by the above mentioned link in Modules 4, 6, 7 and 9 by using the above mentioned link.

**Watch now:** [Video about team behind this MOOC](#)



Figure 8: [Video about team behind this MOOC](#); Source: COPE production



## Let's jump-start into the matter: What is EU Cohesion Policy?

In a nutshell: EU Cohesion Policy, also referred to as Regional Policy, aims at improving the economic well-being of regions in the EU, by reducing economic, social and territorial regional disparities, with emphasis on restructuring declining industrial areas and diversifying rural areas with declining agriculture (see our glossary).

### And how does that work in concrete terms?



You certainly have very special memories of the COVID-19 pandemic lockdown periods. No school, no friends, no fun. It was a dramatic period for people in Europe and in other parts of the world. Families lost beloved members, workers lost jobs. Students were forced into home schooling. Health systems in almost all countries faced a crisis situation. Travel and international cooperation went down significantly. Many businesses and companies struggled to survive the ensuing deep economic crisis.

*Figure 9: What does the EU have to do with young people during COVID-19 pandemic?;  
Source: Drazen Zigic/Freepik*

The EU swiftly reacted to the shock for economies by creating several large-scale investment programs. The first and biggest has been NextGenerationEU, announced by Commission President Ursula von der Leyen in May 2020 - amidst the first dramatic months of the pandemic. The EU pledged to provide €723 billion to support post-pandemic economic recovery across Europe. The money was not intended to bail out national budgets in times of crisis. Instead, EU countries have been challenged to come up with innovative concepts of how to spend these funds both strategically and future oriented. Thus, NextGenerationEU has been conceived to transform and modernise their economies.



*Figure 10: EU Commission President Ursula von der Leyen announced NextGenerationEU; Source: European Union, 2023*

### The EU and the COVID-19 crisis: 723 billion € – but “no impact”?

While other EU funding initiatives to support especially less developed and poorer regions in Europe have remained largely unknown to the wider publics across the European Union, the COVID-19 pandemic packages received much more media and public attention than previous economic policy “packages” (see modules 4 to 10 in this MOOC). According to an EUROBAROMETER representative survey of EU citizens, half of the people across the European Union had at least heard of the EU recovery funds (Eurobarometer, 2023) But what do they think about its impact? On the personal level, they see – almost none.

- Two-thirds of respondents think that NextGenerationEU will have a **positive impact on future generations** (20% ‘yes – a lot’ and 46% ‘yes - a little’).
- A somewhat smaller share reply that NextGenerationEU will lead to **economic growth and more jobs** (14% ‘yes – a lot’ and 47% ‘yes - a little’).
- A much smaller number of respondents, however, think that NextGenerationEU will also have **a positive impact on their personal or professional situation** (9% ‘yes – a lot’ and 26% ‘yes - a little’), while a majority expect no impact in this area (23% ‘no – not at all’ and 35% ‘no – not really’).

Is this true? Is EU - taxpayers’ - money not reaching its targets? Is it not invested in a way that people have the feeling it makes a difference – for the better?

### **Or do media professionals simply overlook what is being done?**

Do news media simply miss out on relevant European “success” stories, each with the potential to generate “constructive news”? Audience studies have long shown that people react with “news avoidance” to constant streams of catastrophic headlines in the news.

Or do journalists fail to do a proper research job and hold politicians and officials on all levels – from EU to local – to account for a transparent and responsible spending of these funds?

These are some of the questions this MOOC wants to explore – together with you, and fellow journalism students from all 27 EU member states. We want to provide practically relevant, and intellectually stimulating, training enabling you to provide a professional, critical and comprehensive coverage of EU issues. which is essential for the future of our continent. Europe needs a critical constituency to advance its democracy. Europe needs a plurality of independent professional media voices and knowledgeable journalists - and we want to encourage you to become one of these critical voices!

### **Your first newsroom assignment – meet leading Harald Schumann from Investigate Europe!**

How fast can you jump into covering a European story? We will take you now to a newsroom simulation. You are an intern at a local medium, and your editor-in-chief has a job for you.

In the following video, you will meet Harald Schumann, one of the best-known journalists covering EU matters. After working for the famous German news magazine DER SPIEGEL for many years, Harald started in 2016 the research network INVESTIGATE EUROPE, connecting journalists from across Europe.

**Watch now:**  
[Investigate Europe – About us](#)



Harald Schuman is a member of the Advisory Board of the COPE MOOC you are using right now.

**Watch now:** [Harald Schumann from Investigate Europe](#)



*Figure 11: Video - Harald Schumann from Investigate Europe; Source: COPE production*

You will receive feedback from Harald Schumann afterwards.

### **Exercise 1: Your story!**

Write your own short story(400 words) about a specific Cohesion Policy case in your region, which can be published alongside the big news from Brussels about the annual European Court of Auditors report. Please produce your text file in a separate file.



## Welcome back to the newsroom! Here is Harald's advice:

Meet again Harald Schumann – to reflect on the research you have just conducted. Learn how an experienced EU journalist would tackle the assignment. Here is Harald's feedback for you:

Watch now: [Harald Schumann's Feedback](#)

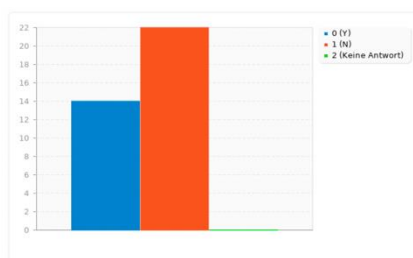


Figure 12: *Video - Harald Schumann's Feedback*; Source: COPE production

## Media coverage of EU matters – challenges, achievements, shortcomings

One of the key aims of this MOOC is to make you aware of journalism's role for the future of the European Union. We want to support you in gaining the professional skills and knowledge needed to report on European issues – critically and comprehensively. We want to encourage you to find the local viewpoint in EU news. We are sure that by breaking down themes and finding and exploiting local sources, you will develop creative visions on how to ground narratives in the everyday lives of EU citizens – which are your audience. There is also multiple potential for newsrooms to use social media, crowdsourcing, and other means to engage people in monitoring EU matters while also preserving newsrooms' economic sustainability, by making independent media relevant to media users. Big data can be exploited as an important source for research, cross-border and collaborative research, and investigation can help to identify and successfully pitch new, creative and highly engaging story ideas. Modules 10 to 14 have been created to take you on a journey to explore the journalistic potentials of EU coverage. But we also want to sensitise you for the relevance and ethics of media coverage on EU matters – for citizens and voters across the EU in the 27 member states, for political actors and institutions in Brussels and “at home”, and for societies.

Do you address mass communication research results on EU matters (EU coverage, European public sphere, etc.) in your curricula?



Normative reflections are highly relevant for a professional coverage – for example: which role does the media have in the European process? How do media impact audiences across the EU? Currently, only one third of the European journalism institutes we surveyed in early 2023 said they also include mass communication research results, which invite students to critically discuss the role of media in the context of Europe.

Figure 13: Are research findings on mass communication included in the curricula?;

Source: TU Dortmund University / own survey

## “Vertical” and “horizontal” Europeanization

The mass media play a critical role in the European public sphere by informing citizens about the EU. Research shows that the media not only present EU news but also redefine and reshape news, and media can impact on citizens’ attitudes to the EU ([de Vreese and Boomgaarden, 2006](#); [de Vreese & Semetko, 2004](#)).

Journalism promotes knowledge of the daily agenda and public affairs and assists decision making in the social and political fields. The media are seen as playing an important role in the emergence of a European public sphere, as they impact the degree of Europeanisation of national public spheres ([Brüggemann & Kleinen-von Königslöw, 2009](#)) and thus also citizens' views on "Europe" ([Boomgaarden & de Vreese, 2016](#)). [Gerhards \(1992, p. 560\)](#) points out the difference between

- "European public spheres" and
- "Europeanised national public spheres", which was taken up by [Koopmans and Erbe \(2004, p. 101\)](#) and further developed into
- “vertical” and
- “horizontal Europeanisation”.

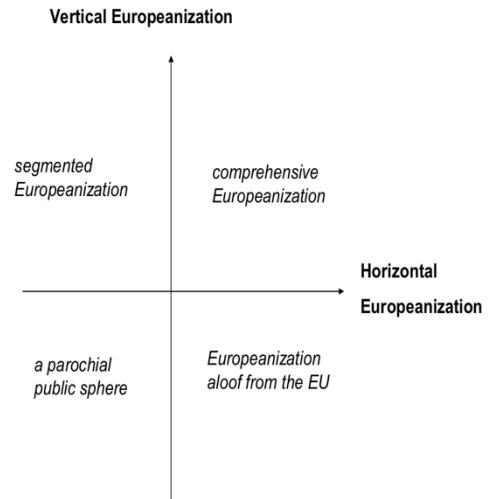


Figure 14: Four patterns of Europeanisation; Source: [Brüggemann & Kleinen-v. Königslöw, 2007](#)

Please, find the definitions of these four patterns of Europeanisation in the glossary.

Before the Ukraine war, the projection of a European public sphere “in which Europe's citizens discuss issues of equal relevance at the same time” ([Lönnendonker, 2018, p. 130-131](#)) has long seemed unrealistic in view of the multitude of diverging strategic interests. Comparative studies on the media agendas within EU states in the 2000s still concluded that EU countries were hardly interested in each other ([Pfetsch, 2004, p. 17](#)).

## EU crises and EU coverage

More recent studies show that Europeanisation is taking place to an increasing extent, with vertical Europeanisation predominating ([Hutter & Grande, 2014](#); [Kleinen-von Königslöw, 2012](#)). [Risse \(2014, p. 1208\)](#) argues that the economic "Euro crisis" of 2010 promoted the Europeanisation of national public spheres and increased the degree of identification with the EU. [Kaiser and Kleinen-von Königslöw \(2017, p. 800\)](#) conclude that the degree of Europeanisation of national publics depends on the topic. [Picard's study \(2015\)](#) of ten European countries shows that the media took a national rather than a European approach to reporting the “Euro crisis” and that the respective national narratives on the crisis and Europe were mainly based on national concerns and interests towards the European Union. The coverage of "Brexit" has also lacked a European approach ([Borchardt, Simon, & Bironzo, 2018](#)). Similarly, an analysis of coverage of the Ukraine conflict ([Fengler et al., 2018](#)) in 13 Western and Eastern European countries indicates that attention to the conflict varies starkly across EU countries. This result can be attributed, on the one hand, to the various degrees of geographical and cultural proximity as well as economic relations to Ukraine and, on the other hand, to the lack of editorial resources for foreign reporting, especially in the Central Eastern European (CEE) countries.

## Many challenges to robust EU coverage

Indeed, context factors for media coverage across Europe are rapidly changing. While traditional party landscapes are dissolving in many EU countries, in many of them traditional as well as new political actors are successfully making use of social media to establish and enforce their strategic goals in the public beyond the traditional arenas of political discourse ([von Nordheim et al., 2018](#)).

The overall trust gap between traditional media and social media has widened considerably in past years ([Newman et al., 2021, p. 9](#)). Part of this strategy can also be - as has now been widely analysed by political science and communication studies - the deliberate placement of misinformation (fake news), which also challenges the credibility of established media ([Eberwein, Fengler, & Karmasin, 2019](#)). In the digital era, the established media in virtually all European countries are facing fundamental economic problems, which have long since had a massive impact on editorial resources and thus also on the structures of reporting. Foreign reporting - which is costly - is particularly affected ([Heimprecht, 2017](#)). Most recent comparative studies show how media agendas in the EU states can drift apart – take as an example our analysis of European coverage of migration and asylum policies ([Fengler & Kreutler, 2019](#)). This study found that some countries take in a lot of migrants and refugees – for them, the migration story is a domestic one. Other countries are much more reluctant to accept asylum seekers – for their media, news about migration is foreign news.



Figure 15: Is the migration story a domestic one?;  
Source: Fengler & Kreutler, 2019

### Exercise 2:

Having read the recommended academic text, take a moment to think about media coverage in your country against the backdrop of the studies cited above. How would you describe coverage of EU matters in your country? If your university has access to data bases like Lexis Nexis, you may also experiment with how often the term “cohesion policy” is mentioned in the news coverage of your own country. Write a 700-word essay on the academic debate, and how actual media performance in your country relates to that. Use a maximum of 60 minutes to work on this exercise. Please check the COPE MOOC for sample solutions.

## From average citizen to Nobel prize winner: Perspectives on EU Cohesion Policy

Currently Portugal as well as Central Eastern European countries receive most cohesion funds. In the past, Southern Europe benefited the most. Modules 2 to 5 will tell you more about the history of European institutions.

### Critical coverage of EU Cohesion Policy is extremely important

Europe needs you to scrutinize local bureaucrats and politicians – and to question EU policy! You can start thinking that a story on a cohesion topic for a media outlet in Romania may be not be the same as a story for one in Denmark. Some countries ‘give’, some ‘receive’. But publics (= taxpayers) in both countries should have a critical interest that the [huge amounts of EU Cohesion Policy Funding](#) (with a share of 31 percent of the total budget - around 330 billion Euro - Cohesion Policy is an important priority area.) are spent in an accountable and effective way.

#### Actual individual consumption per capita (in PPS, 2020)

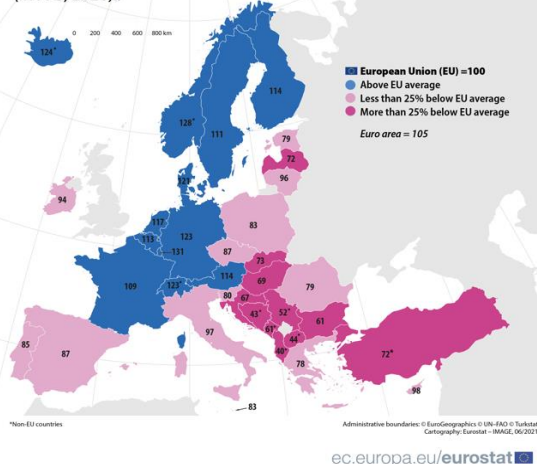


Figure 16: Imbalance in purchasing power across the EU according to EUROSTAT (2021); Source: Eurostat

Critical coverage of EU Cohesion Policy is extremely important, as 40% of all reported fraud cases regarding EU spending, across all sectors, relate to EU Cohesion Policy. This, according to the [European Court of Auditors](#) (ECA), amounts to approximately €1 billion of EU money lost in corruption! The ECA urges EU member states to detect and combat fraud much more vigorously – but it is also the responsibility of newsrooms and civil society to promote the topic on the public agenda. The less media reportage, the less pressure local administrations might feel to counter illegal spending of public money. Indeed, studies of media coverage of EU Cohesion Policies find that reporting in regional media is mostly positive – only national and international media tend to be more critical ([Mendez et al., 2020](#)). On social media, too, the tone regarding cohesion projects is neutral or positive, with EU and local government institutions largely setting the agenda ([Carrascosa et al., 2018](#)). Does this positive coverage contribute “to the legitimization of the EU”, as suggested by [Mendez et al. \(2020, p. 1050\)](#)? Or do these findings rather point to deficits in reporting practices at regional news media? If reporters are not pursuing their watchdog role, they can hardly uncover rent-seeking, cronyism, mismanagement, and other wrongdoings. We argue that a more critical perspective would also be more beneficial for the European process: By vigorous media scrutiny of concrete projects, holding officials and companies to account, and promoting public engagement – ideally throughout the entire process of planning and realisation – project performance could be improved. As [Stiglitz \(2002\)](#) notes, independent media mitigate information asymmetries and thus help to diminish the principal-agent problem that typically plagues economic assistance programs.

In theory, EU Cohesion Policy “is one of the most visible EU policies with a direct impact on people’s daily lives through investments in infrastructure, business grants and training for people across all regions of the EU”, state [Mendez et al. \(2020, p. 1035\)](#). “The periodic negotiations on the EU’s multiannual financial framework (MFF) and cohesion budget heading are particularly salient in the media, as they expose political conflicts between net payer countries and net beneficiaries over the size and distribution of the EU budget” ([Mendez et al., 2020, p. 1035](#)).

But in practice, people are not aware of cohesion policies.

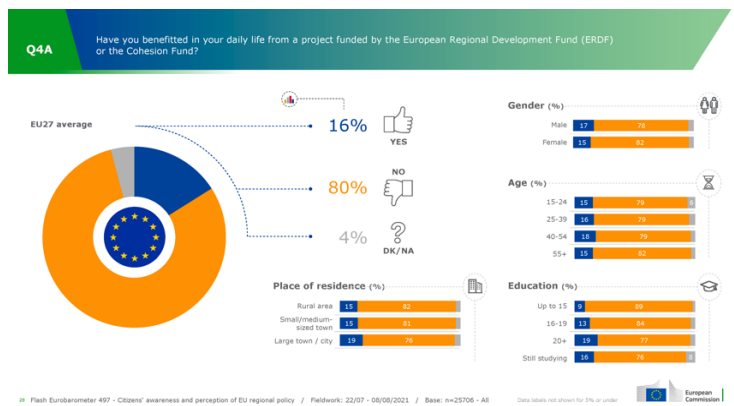


Figure 17: Have you benefited in your daily life from a project funded by the European Regional Development Fund (ERDF) or the Cohesion Fund?; Source: eurostat

### Cohesion Funds: Fairness, reward – or punishment?

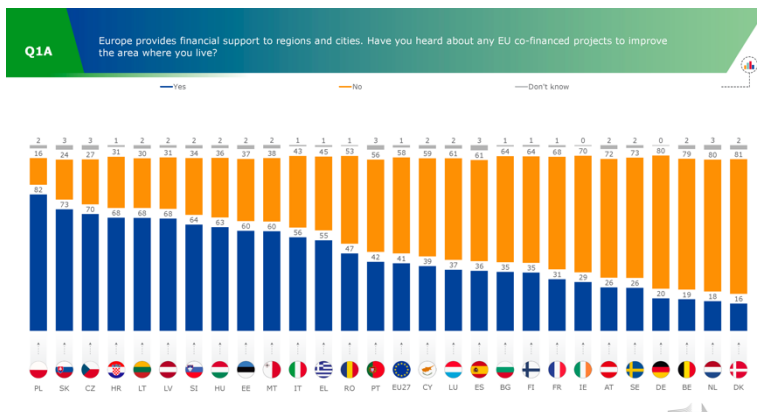


Figure 18: Have you heard about any EU co-financed projects to improve the area where you live?; Source: eurostat

People in CEE countries know more about EU Cohesion Policy – as they have profited from investments since their accession in 2004. In contrast, people in Western Europe are much less aware of EU Cohesion Policy and indeed for many EU Cohesion Policy has a negative association, as it is most often mentioned in the context of punishment for lack of good governance such as in Hungary and Poland.

It seems that scholars of economics have so far been much more critical of EU Cohesion Policy than journalists. Economic analyses have amassed evidence questioning the effectiveness and efficiency of the EU’s cohesion policies. Many EU Cohesion Policy projects do not meet their aspired goals, and even have detrimental effects. In a longitudinal comparative analysis covering four program periods, [Bachtler et al. \(2017\)](#) conclude that EU Cohesion Policy spending has suffered from a lack of conceptual thinking, vaguely defined objectives and mismanagement. They also concede that there is evidence of improvement over time. In a study conducted at the request of the European Parliament, [Darvas et al. \(2019\)](#) state that EU Cohesion Policy is suffering from a range of, at times contradictory, goals. Focusing solely on the economic objective of fostering growth, [Di Caro and Fratesi \(2022\)](#) argue that “ineffectiveness” is a wide-spread EU Cohesion Policy problem. This means regions receive intense cohesion funding without a measurable growth-enhancing impact. According to Di Caro and Fratesi, this is the case for Portugal, Hungary, Ireland, the Baltics, large parts of Greece, Spain and Southern Italy (2022, p. 316).



## Journalism that makes EU Cohesion Policy relevant: A best practice case

Does ‘EU Cohesion Policy’ sound boring? Check out [the intriguing story](#) the newsroom of Investigate Europe has produced on cohesion funds for railways in Europe!

The story also shows that critical coverage is badly needed in all EU countries. While many stories focus on EU Cohesion Policy funds directed at CEE and Southern European countries – which are the main recipients of these funds – critical coverage on this key EU funding instrument is badly needed in all EU member states. Thus, this comprehensive story provided by Investigate Europe also sheds light on malpractice in Northern and Western Europe - no country can be immune from critical scrutiny!

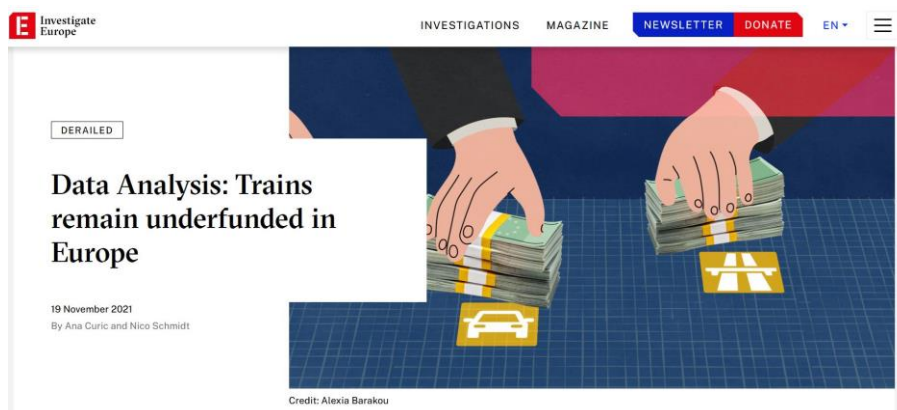


Figure 19: Story about underfunded trains in Europe; Source: Investigate Europe

Exercise: Check out the [interactive map](#) provided by Investigative Europe – what do you learn about your country? Use a maximum of 30 minutes to work on this exercise.

Feel free to use [additional material](#) and watch the video report “Derailed — The desolate state of European railways.”

Watch now:

[Derailed – The desolate state of European railways](#)



## Interactive element: “Message in a bottle”



Figure 20: What do you expect from this MOOC?;  
Source: xat-ch/Pixabay

What do you expect from this MOOC? Write a “message in a bottle”, toss it into the digital ocean – and discover in which module you will retrieve your “bottle” back!

Use a maximum of 10 minutes to work on this exercise.

## Module authors



Figure 21: Module authors; Source: TU Dortmund University/own production

The module has been written and developed by Prof. Dr. Susanne Fengler, Isabella Kurkowski MA, Anna-Carina Zappe MA, and Richard Brandt BA, all from TU Dortmund University Dortmund, Germany.

Susanne Fengler is professor of international journalism and director of the Erich Brost Institute for International Journalism at TU Dortmund (henceforth EBI). Isabella Kurkowski is the COPE managing director at the EBI and an international media development expert. Anna-Carina Zappe is a senior researcher at the EBI, and also a TV journalist and E-Learning expert. Richard Brandt is a junior researcher at the EBI and focuses on economic policy coverage.

We are incredibly grateful to Yasmine Wauthier MA from AP Antwerpes University, who has enriched this project with invaluable strategic didactical advice as well as the most kind and sensitive, creative and down-to-earth practical inspiration in the whole process of the MOOC development.

## Module 2: Institutions, Structures, and Procedures of the EU – Part 1

### Basic Information

Module number	2
Module title	Institutions, structures, and procedures of the EU – part 1
Duration/study load	8 hours
Keywords	European Union (EU), Intergovernmentalism, Single Market, Treaty, Rule of Law, Supranationalism, Institutions of the EU, Institutionalisation of the EU, Democratic deficit in the EU, European Economic and Monetary Union (EMU)
Learning outcomes	<p>At the end of the module, you should...</p> <ul style="list-style-type: none"> <li>● Be able to identify newsworthy issues on the basis of in-depth research</li> <li>● Be able to reproduce general knowledge as well as specialised knowledge (e.g., understanding how events affect the EU and vice versa) in a field of EU matters</li> <li>● Be able to distinguish between main and side issues concerning EU activities</li> <li>● Be able to interpret the selected information in a field of EU matters</li> </ul>
Description	<p>Module 2 provides you with key knowledge regarding the basics of the history and the institutions of the EU, learn about the importance of historical events, and provides you with a better understanding of what the EU is and does and why it exists. Along with Module 3, Module 2 prepares you for learning about the EU cohesion policy in Module 4. You will learn about the reason why the EU was established. This will be narrated using the concepts ‘integration’ and ‘enlargement’. You will learn about EU Treaties, political sensitivities, the Schengen Area, the Single Market, and the Copenhagen Criteria. You will also learn about EU institutions: the European Council, the European Commission, the European Parliament, and the Council of the EU. In addition, they will also learn about both controlling and advisory institutions.</p>
Sequentiality	Module 2 is intertwined with Module 3. Module 2 and 3 also introduce other modules (mainly Module 4)



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## Glossary

Democratic deficit in the EU	Democratic deficit, in relation to the EU, refers to a perceived lack of accessibility to the ordinary citizen, or lack of representation of the ordinary citizen, and lack of accountability of EU institutions (Chryssochoou, 2007).  Source: <a href="#">SCE (2023)</a>
European Economic and Monetary Union	The European Economic and Monetary Union (EMU) integrates the economies of the 19 EU member states through a group of economic and monetary policies. All the EU states are in the economic, but not all are in the monetary union (CFI, 2023).  Source: <a href="#">CFI (2023)</a>
European Union (EU)	The European Union is a supranational political and economic entity, which operates in some ways as an intergovernmental organisation (McCormick, 2014).  Source: <a href="#">CES Carleton (2023)</a>
Institutionalisation of the EU	The process through which European political space – supranational policy arenas or sites of governance, structured by EU rules, procedures, and the activities of the EU’s organisations – has evolved.  Source: <a href="#">Stone Sweet et al. (2001)</a>
Institutions of the EU	The EU’s institutional set-up is unique, and its decision-making system is constantly evolving. All the European institutions (seven), EU bodies (seven) and decentralised agencies (thirty plus) are spread across the EU (EU, 2023).  Source: <a href="#">EU (2023)</a>
Intergovernmentalism	Intergovernmentalism emphasises the role of states and their interests in shaping the process and outcomes of integration. The EU utilises a system of cooperation between governments in which national governments co-decide the direction and pace of integration in the EU (McCormick, 2014; Verdun, 2020).  Source: <a href="#">Oxford Reference (2023)</a>

Rule of Law	<p>The Rule of Law is a principle that refers to the idea that everyone is subject to the law (regardless of their position or power). It is a fundamental principle of modern democratic societies and is based on the belief that law should be used to protect both individuals and society. It is essential for ensuring that the government operates within its legal limits and ensures a stable, democratic and free society (Choi, 2023; Waldron, 2020).</p> <p>Source: <a href="#">EU (2023)</a></p>
Single Market	<p>The Single Market is a trading bloc created by the member countries of the EU where goods, services, capital, and people can move freely between the participating countries without any internal borders or obstacles (Ratcliff et al., 2022).</p> <p>Source: <a href="#">EU (2023)</a></p>
Supra-nationalism	<p>Supranationalism is a concept that refers to the formation of political entities that transcend national boundaries and sovereignty. Supranationalism implies a transfer of authority from the national to the supranational level, as well as a degree of integration and interdependence among the participating states (Simonyan, 2022). The EU is a prominent example of supranationalism.</p> <p>Source: <a href="#">UNC (2023)</a></p>
Treaty	<p>A Treaty is a binding formal agreement between two or more subjects of international law (primarily states and international organisations). It establishes obligations and becomes part of international law (Shaw, 2022).</p> <p>Source: <a href="#">EU (2023)</a></p>

## Acronyms

CoR	European Committee of the Regions
DG	Directorates-General
EC	European Community
ECA	European Court of Auditors
ECB	European Central Bank
ECHR	European Convention on Human Rights
ECR	European Conservatives and Reformists
EDPB	European Data Protection Board
EDPS	European Data Protection Supervisor
EEAS	European External Action Service
EEC	European Economic Community (established in 1957 by the Treaty of Rome as the predecessor of the EU)
EESC	European Economic and Social Committee
EFA	European Free Alliance
EFSA	European Food Safety Authority
EFTA	European Free Trade Association
EIB	European Investment Bank
EMU	European Economic and Monetary Union
EO	European Ombuds
EPP	European People's Party
EU	European Union (founded in 1993)
ID	Identity and Democracy
MEP	Member of the European Parliament
MOOC	Massive Open Online Course
SEA	Single European Act
WEU	Western European Union
WU	Western Union

## About this module



Figure 22: The Flag of Europe as well as of the European Union, with 12 golden stars in a circle; Source: Wikimedia Commons

Welcome to Module 2 of the COPE MOOC! While this module can be studied independently, its primary purpose is to equip you with the necessary knowledge and skills to tackle the upcoming modules in this MOOC. Nevertheless, Module 2 delves into a highly significant topic - the history and institutions of the EU. In essence, this module imparts fundamental knowledge to you about the EU's history and institutions, the significance of historical events, and a deeper comprehension of what the EU represents, its purpose, and activities.

Module 4 introduces EU Cohesion Policy, and we highly recommend that you take Modules 2 and 3 before delving into Module 4's EU Cohesion Policy to acquire a comprehensive understanding of the EU's basics. Module 2 comprises exercises to reinforce your learning as you progress.

This Module will occasionally refer to additional content from EU websites. Here, you will find accurate information regarding the EU, albeit that these websites often do not contain criticism towards the EU.

### Introduction to the story of this module

Let's meet Michael! Michael was born in New York (USA). He is now 21 years old and after finishing his bachelor's degree in international relations he wants to continue his studies in Brussels. His master's thesis will be related to the EU Cohesion Policy of the European Union. As a start, he wants to learn about the history of the EU and its institutions. In this module, you may join Michael in his journey through the many historical events that shaped the EU as we know it today! Maybe you could learn it together!

The European Union, commonly known as the EU, is a **supranational** political and economic entity (Deschouwer & Hooghe, 2015), that operates in some ways as an **intergovernmental** organisation (McCormick, 2014). The EU has a unique and complex history that is still evolving and growing today. We also freely invite you to look at the following [link](#) for more information on EU history.

It is crucial for journalists to possess a comprehensive understanding of the EU, its functions, and its historical origins to report effectively on EU-related news. For instance, to better understand complex geo-political events such as the ongoing conflict between Ukraine and Russia.

In essence, to gain a better understanding of the present, it is imperative to first comprehend the past. Consequently, this module will cover essential topics such as EU Treaties, international politics, the Schengen Area, the Single Market, the Copenhagen Criteria for membership, and the several key institutions of the EU.

## What is the EU and why was it established? — Aftermath of World War II

Michael suggested we should take a look at the very beginning when the idea of the EU was conceived!

The EU was initially established as a way of preventing military conflicts between its member countries. As such, the **Schuman Declaration**, proposed by French foreign minister Robert Schuman on May 9, 1950, is regarded as a pivotal moment in the establishment of what is now the European Union. The declaration proposed the creation of a European Coal and Steel Community, whose members would pool coal and steel production.

The ECSC (founding members: France, West Germany, Italy, the Netherlands, Belgium and Luxembourg) was the first of a series of supranational European institutions that would ultimately become today's "European Union".

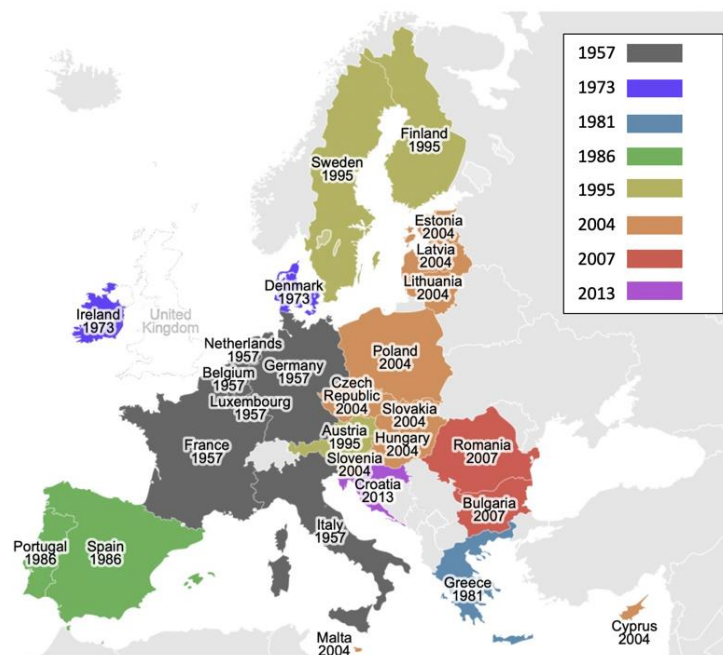


Figure 23: The EU in its current form. The UK left in 2020 (after initially joining in 1973)

### What do you think was the purpose of the ECSC?

It was thought – correctly – that merging of economic interests would help raise standards of living and be the first step towards a more united Europe. Membership of the ECSC was open to other countries. This initiative, perceived as a way to ensure peace and prosperity in Europe, laid the groundwork for the development of further institutions leading to the formation of the European Economic Community (EEC) and ultimately the European Union.

The EU has become a major player in global politics and economics, and continues to work towards greater unity and cooperation among its member states. The EU's goals include promoting economic growth and social welfare, ensuring peace and security, and protecting the rights and freedoms of its citizens.



Figure 24: The labelling used by the USA on aid package; Source: Wikimedia Commons

World War II had a profound effect on Europe, and in response, the United States of America implemented the **Marshall Plan** in 1948. This initiative, also known as the European Recovery Program, aimed to provide more than \$13 billion (which is approximately \$150 billion in today's index price!) in economic assistance to Western European economies. Spain, however, did not benefit from the plan. The US intended to reconstruct war-ravaged regions, improve European industry through the elimination of trade barriers, and, most importantly, prevent the spread of communism. Similarly, the Soviet Union launched the Molotov Plan, which aimed to assist nations in Eastern Europe that were politically and economically aligned with the Soviet Union.

Thus, the EU is a supranational political and economic entity that has a rich history dating back to the aftermath of World War II. While its origins lie in the need to prevent military conflicts through economic integration between member states, the EU has grown and evolved over time to become a major player in global politics and economics. Its goals and ambitions continue to evolve as the organisation seeks to promote unity and cooperation among its member states.

### Integration versus Enlargement: A Two-Sided Story

Michael wonders whether it could help if we take a look at EU history from two important aspects. He says that in order to gain a further understanding of the historical development of the EU, it is useful to consider two significant factors that have shaped its evolution: integration and enlargement. Both factors influence each other continuously (for example new member states can influence the EU's policies; likewise, increased integration incentivises new countries to join).

Integration is the process of bringing together countries and regions to form a more unified entity by introducing common policy (this is achieved with international law). In the case of the EU, integration has been the driving force behind the creation of a common market, the adoption of the consecutive basic **Treaties**, binding legislation, and the establishment of shared institutions. The EU has worked towards integration in a number of areas, including trade, agriculture, environmental policy, and social policy.

#### Definition of **Treaty**:

*A Treaty is a binding formal agreement between two or more subjects of international law (primarily states and international organisations). It establishes obligations and becomes part of international law.*

#### Exercise 1:

Michael wondered: "What do you think is the purpose of the integration process?"  
The solution to this exercise can be found at the very end of this module.

**Enlargement** is the process of expanding the EU by admitting new member states. Since its founding in 1957, the EU has grown from six original members to the current 27 member states. Enlargement has been a key part of the EU's strategy for promoting stability, prosperity and democracy in Europe by spreading the benefits of integration to new countries. Countries bordering the current EU that have no (immediate) prospect of accession are linked to the EU through the EU's neighbourhood policy.

### Integration: European Treaties

EU history knows plenty of Treaties. In fact, there are 14 important Treaties we will mention here. Look at the Table below, the most important Treaties are marked in bold. The most important Treaty in this list is the Treaty of Lisbon, as it remains the current constitutional basis of the EU. The Treaties marked in bold can be considered the most important ones to remember.

#### Important Treaties with their corresponding descriptions:

Important Treaties	Short description
1948 <b>Treaty of Brussels</b>	This Treaty conceived the Western Union (or WU): Belgium, Luxembourg, and the Netherlands joined forces with France and the UK.
1949 North Atlantic Treaty	The treaty formed the legal basis of the North Atlantic Treaty Organization (better known as NATO). <u>Twelve</u> states became the founding members of NATO: all members of the Western Union, Canada, Denmark, Iceland, Italy, Norway, Portugal, and the United States.
1951 <b>Treaty of Paris</b>	This Treaty established the European Coal and Steel Community (ECSC). The ECSC was Europe's first supranational community.
1954 Modified Brussels Treaty	In 1954, after the Treaty of Paris was rejected by the French parliament, the Treaty of Brussels was amended as the Modified Brussels Treaty, transforming the Western Union into the Western European Union (the WEU), admitting Italy and West Germany.
1957 <b>Treaty of Rome</b>	This Treaty established the European Economic Community (EEC), also known as the Common Market. The Treaty aimed to remove trade barriers, laying the foundation for a future Single Market.
1957 Euratom Treaty	This Treaty created the European Atomic Energy Community (EAEC). Similarly, this Treaty aimed to create a common market, but specifically for atomic energy and the development of nuclear energy for peaceful purposes among its member countries. The Treaty also established the European Atomic Energy Community (EAEC) as an independent supranational organization.
1963 Élysée Treaty	To symbolize the friendship between France and Germany as well as promote cooperation in political, economic, and cultural relations after their turbulent history.
1965 Merger Treaty	the Merger Treaty merged the executive branches of the EEC and Euratom into a single set of institutions with a unified administration. Three new institutions were created: (1) the European Commission, (2) the Council of the European Union, and (3) the European Parliament



1985	Schengen Agreement	In 1985, five members of the EEC signed the Schengen Agreement introducing the Schengen Area in Europe. Since then, it has become an area comprising 27 European countries that have officially abolished all passports and all other types of border control at their mutual borders
1986	Single European Act	This important Act was the first major revision of the 1957 Treaty of Rome. It ensured the free movement of goods, services, capital, and people within the EEC, creating the Single Market.
1992	<b>Maastricht Treaty</b>	Also known as the Treaty on European Union. It officially established the EU and the three pillar structure: (1) the supranational economic integration (including the single currency), (2) the intergovernmental Common Foreign and Security Policy and (3) the intergovernmental Justice and Home Affairs.
1997	Treaty of Amsterdam	This Treaty reformed and streamlined the EU's institutional framework in the three-pillar structure further and introduced the High Representative for Foreign Affairs.
2001	Treaty of Nice	This Treaty was a reaction to the Treaty of Amsterdam after France and Germany failed to agree on the number of seats in the European Parliament. The Treaty reformed the institutional structure to prepare the EU for its big enlargement, but failed to reform the EU in a radical way.
2007	<b>Treaty of Lisbon</b>	This Treaty remains the current constitutional basis of the EU. The Treaty included: (1) institutional reforms, (2) greater democratic accountability (giving national parliaments a greater role in the EU decision-making process), (3) enhanced cooperation on foreign policy and defense, and (4) greater flexibility in the decision-making process.

Source: COPE creation

## Exercise 2:

Also consider looking [here](#) for more information on EU Treaties.

Let's test what we have learned. Below is an exercise. Try to order all the Treaties in their correct order.

- a. Treaty of Rome
- b. Treaty of Brussels
- c. Treaty of Lisbon
- d. Maastricht Treaty
- e. Single European Act
- f. Treaty of Paris

Describe shortly what the following Treaties are about (hint check the Table for the solution):  
Use a maximum of 10 minutes to work on this exercise.

- Single European Act:
- Euratom Treaty:
- Treaty of Lisbon:

The solution to this exercise can be found at the very end of this module.

## Integration: Charles de Gaulle & Margaret Thatcher

Let's take a look at some important political figures! Michael read a lot about Charles de Gaulle and Margaret Thatcher on the internet, but let's take a look at how things happened...

EU integration did not always go smoothly. Member states can disagree with each other during the decision-making process. Member states can in some cases even "veto" against a proposed decision. Veto power is an important mechanism for protecting national interests and ensuring that decisions are made with the consent of all member states.

In 1965, the Empty Chair Crisis occurred. During European Economic Community (EEC) meetings, the French delegation was represented by an empty chair after **Charles de Gaulle** (French President) disagreed with further steps in the integration process. The crisis was averted after de Gaulle's resignation in 1967. Later, in 1969, an important meeting of the European Council took place in the city of The Hague (*The Summit of The Hague*). The meeting resulted in forming a common agricultural policy and a regional development policy. The summit demonstrated the willingness of the member states to work together towards more European integration.

**Margaret Thatcher**, the new Prime Minister of the UK in 1979 was a strong supporter of economic integration and the creation of a single market, but also of national sovereignty for member states (and thus sceptical towards European integration beyond economic issues). During the **Fontainebleau Summit** of 1984, Thatcher was instrumental in pushing for greater intergovernmental

cooperation and coordination between members of the WEU (the Western European Union) regarding defence and security. Moreover, Thatcher (co)enabled the creation of the **Single European Act (SEA)** of 1986. This Act ensured the establishment of free movement of goods, services, capital, and people within the EC. Despite Thatcher's opposition to further supranational integration, she supported the idea of using EU Cohesion Policy for promoting economic growth and job creation (EU Cohesion Policy is a set of measures implemented by the EU to reduce economic and social disparities among regions and countries within the EU).

At the same time, Thatcher was known to be Eurosceptic. After the UK joined the EC in 1973, the integration process was hampered due to Thatcher's political views regarding the European Community (EC). In the 1980s, the UK was one of the largest contributors to the EC's budget, and Thatcher believed that the UK was paying too much. She argued that the EU's method of calculating budget contributions was unfair to the UK, which had a relatively small agricultural sector compared to other member states. She said: "I want my money back".

Thatcher's famous phrase was a reflection of her belief that the UK was entitled to a larger share of the EU budget, and her success in securing the rebate is seen by many as a major achievement of her time as Prime Minister. In addition, it's important to understand that the integration process is intertwined with the EU's enlargement. Thatcher, being opposed to deeper political integration, understood that adding more Member States would slow down decision-making and make Treaty reforms less likely.

The process of EU integration is sometimes compared to riding a bicycle - it continually moves forward, sometimes at a rapid pace and at other times slowly, but it never truly stops. Just like a bicycle falls over when it is not moving, the EU risks falling apart when it is not progressing.

### **Integration: Schengen Area, Single Market and the Eurozone**

The Eurozone comprises all the countries that use the euro (€) as their currency. As you can imagine, most EU members use the euro. But there are a few exceptions. Look at [this website](#) to identify the EU members that do not use the euro. Denmark is a special case, as it joined the EU with an opt-out to not implement the euro.



*Figure 25: The current Schengen Area. Countries in yellow are committed to join in the future; Source: Wikimedia Commons*

**Exercise 3:**

Which seven EU members do not use the euro?

The solution to this exercise can be found at the very end of this module.

In 1985, five members of the EEC signed the **Schengen Agreement** introducing the Schengen Area in Europe. Since then, it has become an area comprising 27 European countries that have officially abolished all passports and all other types of border control at their mutual borders. Look at the picture below. As you can see, the Schengen Area covers most of the EU Members but not all of them. The remaining three EU member states – Bulgaria, Cyprus and Romania – are obliged to join the Schengen Area eventually. Ireland (which is an EU member) chose not to join the Schengen Area, but non EU-members such as Norway and Iceland do.

**Integration: Historic Organisations**

At the beginning of this Module, we referred to the Western Union (WU) and we also mentioned the European Economic Community (EEC). In 2.6 we will dive a bit deeper into the organisations preceding the European Union. Look at the Table below:

**European Historic Organisations:**

European organizations	Why was it created?
1948 – 1954	Western Union (WU)  The WU (also known as the Western Union Treaty Organization) was established in 1948. It was a military alliance formed in the aftermath of WWII. Belgium, France, Luxembourg, the Netherlands and the UK were its members. The WU’s purpose was to provide collective defense against the threat of Soviet aggression. Its military functions were transferred to NATO in 1952.
1951 – 2002	European Coal and Steel Community (ECSC)  The ECSC was established by the Treaty of Paris. It was signed by Belgium, France, Italy, Luxembourg, the Netherlands and West Germany. Its purpose was to create a common market for coal and steel among its members and to pacify relations, especially between France and West Germany by creating common economical interests. This was the first step in the process of European Integration. Its functions were transferred to the EU in 2002.
1954 – 2011	Western European Union (WEU)  The WEU was the successor of the WU in 1954. It was established by the original founders of the WU. West Germany joined the WEU in 1955. Its main purpose was to promote political and economic cooperation among its Member States. Today, the former Member States of the WEU are all members of NATO, and their defense and security policies are largely coordinated through the EU.
1957 – 1993	European Economic Community (EEC)  The EEC was established in 1957 by the Treaty of Rome. It was formed by the members of the WEU (including West Germany). The purpose of the EEC was to create a common market, which was eventually created in 1993 – when the EU was established as the successor of the EEC. The EEC pursued economic integration among its Member States.

1957 – ongoing	<b>European Atomic Energy Community (EAEC)</b>	The EAEC (or Euratom) was established by the Treaty of Rome, to create a common market for nuclear power in Europe. One of its primary purposes is to ensure that nuclear energy is developed for peaceful purposes instead of military applications. Euratom is <u>still in existence</u> today. It works closely with the European Commission and other EU institutions to regulate and promote the safe and peaceful use of nuclear energy in Europe.
1993 – ongoing	<b>European Union (EU)</b>	The EU we know today is more than an international organization; it is a supranational political and economic entity that operates in some policy domains as an intergovernmental organization. It was created in 1993 by the Maastricht Treaty and replaced the EEC. Despite some challenges and criticisms, the EU remains a key player in the global political and economic landscape, and its Member States work together to promote the common interests of the EU as a whole.

Source: COPE creation

As of today, two organisations still exist: (1) Euratom, and (2) the EU. To give you a better idea of how these organisations were in force (some simultaneously), look at the timeline below. Find out which organisations no longer exist. Which organisations are still operational? The answers are in the timeline.

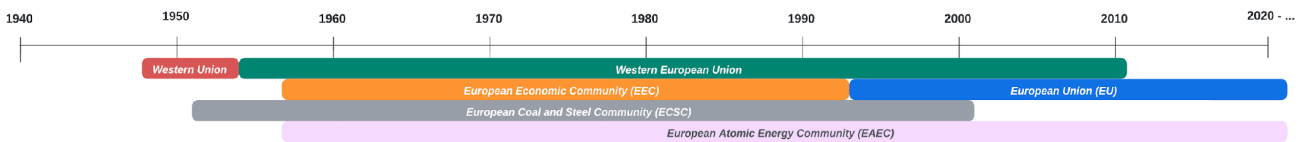


Figure 26: Timeline on EU organisations; Source: COPE creation

### Enlargement: Copenhagen Criteria

We now know a lot about integration. Michael is very happy with everything we learned so far. Let's now take a look at the other side of the story: enlargement!

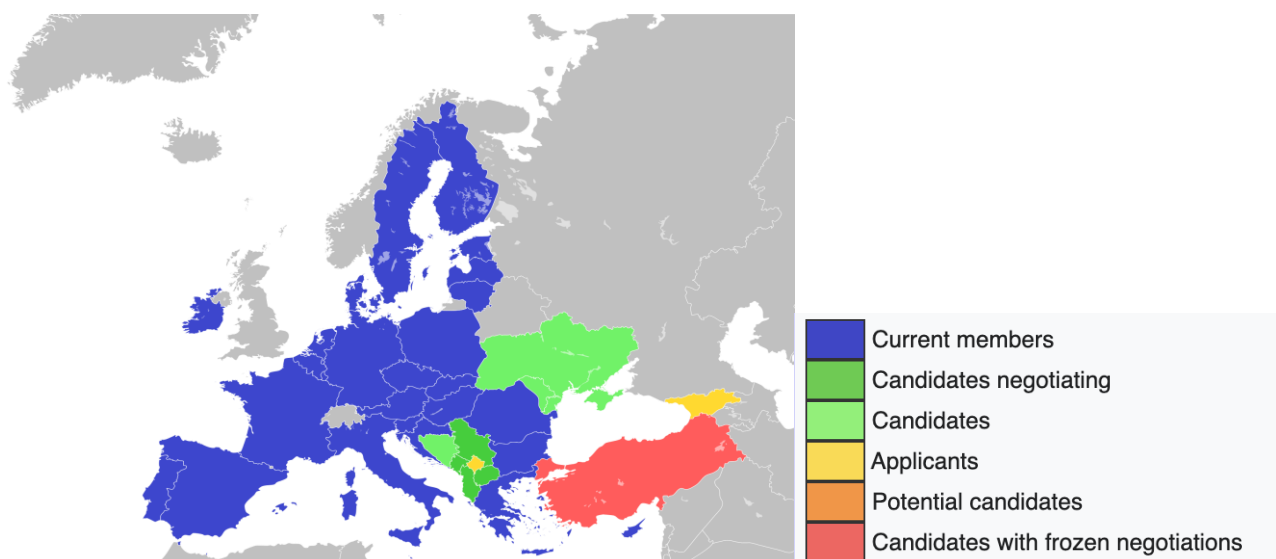


Figure 27: EU member states and candidates; Source: Wikimedia Commons

A country that aspires to become a member state of the EU must comply with the Copenhagen Criteria. These criteria were established at the European Council summit in Copenhagen in 1993. The Copenhagen Criteria consist of three key categories of criteria that a country must meet before it can be considered for EU membership.

**Exercise 4:**

Try to find the three main criteria on the internet. Consider which websites are official EU websites and which are not. Don't trust everything you read in blogs.  
The solution to this exercise can be found at the very end of this module.

In addition, an applicant country must have the ability to implement and enforce the EU's laws, regulations, and standards, including those related to the single market and the common policies of the EU.

When these criteria are met, negotiations can start to join the EU. Since their establishment, the Copenhagen Criteria have been used to guide the EU's enlargement process, which has seen the accession of 13 new member states since 2004. It can take many years before applicant member states have incorporated all existing EU legislation.

Some critics have argued that the criteria are too strict and place an unfair burden on candidate countries. For example, some have criticised the requirement that candidate countries must have a functioning market economy and the ability to compete in the EU's single market.

**Exercise 5:**

What could be the reason for this critique? Why can this be difficult for some countries?  
The solution to this exercise can be found at the very end of this module.

**Enlargement per Country, and the political context**

The EU (back then the EEC) was initially established by six countries.

**Exercise 6:**

Do you know which countries initially established the EEC? Try to find the answer on the internet!

The solution to this exercise can be found at the very end of this module.

The EU has continuously expanded since then (except for Brexit in 2020). Look at the Table below:

## European Enlargement per country

European enlargement per country		Reason for joining the EU
<b>1957</b>	(1-5): Belgium, the Netherlands, West Germany, France, Italy, and Luxembourg	Founders of the European Economic Association (EEC)
<b>1973</b>	(6-8): Denmark, Ireland, and the United Kingdom	In response to the slower economic development in the competing European Free Trade Association (EFTA). The UK left EFTA to join the EC, Denmark and Ireland left EFTA to maintain their trade partnership with the UK.
<b>1981</b>	(9): Greece	Joining the EU became possible after the end of a dictatorship
<b>1986</b>	(10-11): Portugal, and Spain	Joining the EU became possible after the end of a dictatorship
<b>1995</b>	(12-14): Austria, Finland, Sweden	In response to the European Free Trade Association (EFTA)
<b>2004</b>	(15-24): Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia, and Slovenia	Joining the EU became possible after the Cold War (the fall of communism)
<b>2007</b>	(25-26): Bulgaria, and Romania	Joining the EU became possible after the Cold War (the fall of communism). The postponed entry of Bulgaria and Romania can be explained by their slow progress in the Acquis Communautaire.
<b>2013</b>	(27): Croatia	Joining the EU became possible after the Yugoslav Wars and compliance with the International Criminal Tribunal for the Former Yugoslavia

Source: COPE creation

For additional information, click [here](#).



## Timeline: An overview of historical events

Here we will introduce some other crucial events that occurred in EU history. To give you an overview of almost all the important events that occurred (in chronological order), look at the timeline below:

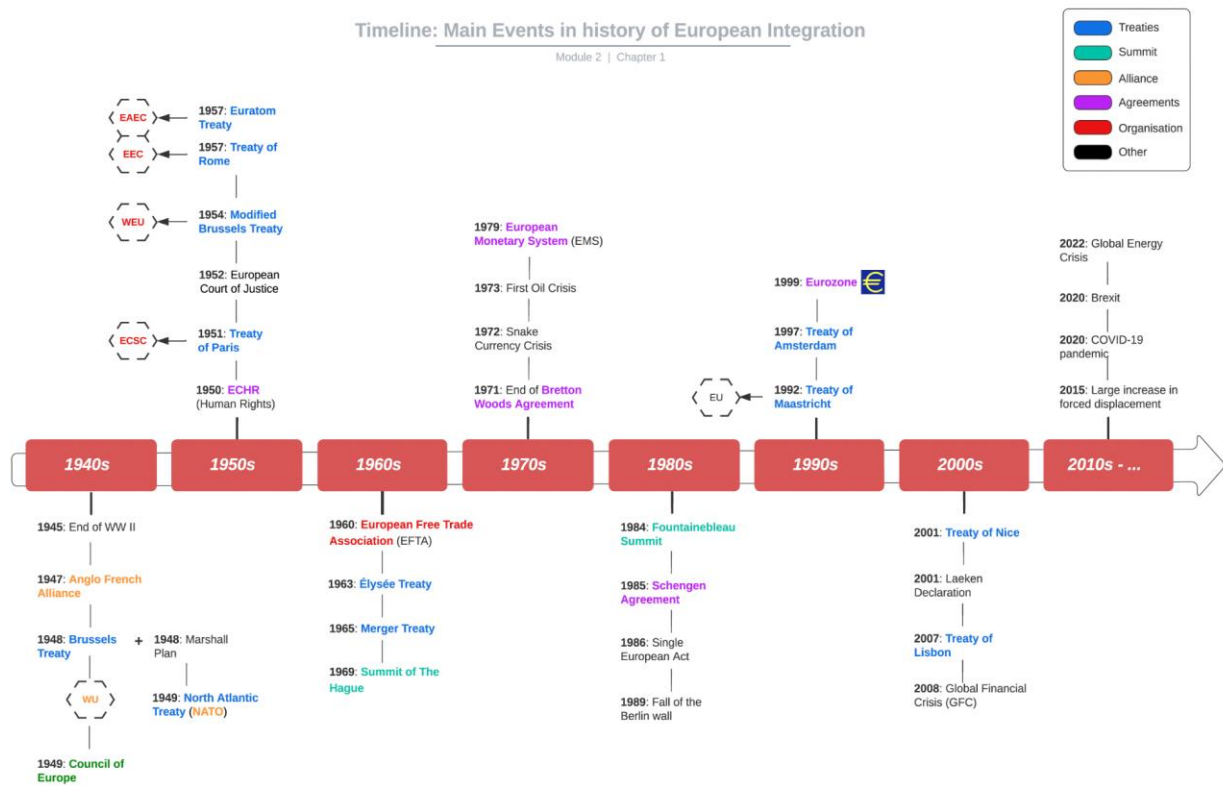


Figure 28: Main events in history of European integration; Source: COPE creation

Let's discuss some of the items we haven't tackled earlier. In 1950, the **European Convention on Human Rights (ECHR)** was signed; it is one of the most significant and effective human rights instruments in the world. The ECHR has been used to challenge discriminatory laws and practices, protect the rights of vulnerable groups, and promote the rule of law and democratic values. Although formally an instrument of the Council of Europe, it has inspired the EU to adopt its own Charter of Fundamental Rights of the European Union. The Charter was later attached to the Treaty of Lisbon (2009).

As mentioned at the beginning of this Module, in 1952 the ECSC was established as one of the first supranational European organisations. France, West Germany, Italy, the Netherlands, Belgium and Luxembourg joined forces. In 1957, the European Economic Community (EEC) was an organisation created with the aim of achieving economic integration among its member states. As you know by now, the EEC was established with the Treaty of Rome.

In 1960, the **European Free Trade Association (EFTA)** was established with initially six member states: Austria, Denmark, Finland, Portugal, Sweden, and the UK. EFTA plays an important role in promoting economic cooperation and free trade among its member states. While current EFTA member states were not bound by EU laws in areas such as agriculture, fisheries, and foreign policy, they had to adopt many EU regulations and standards in order to participate in the Single Market. This can create some tensions between EFTA and EU member states, as EFTA member states may be seen as "rule-takers" rather than having a say in the creation of new EU regulations. Nonetheless,

EFTA membership provides its member states with access to a large and prosperous market without requiring full political integration with the EU.

Later, in 1969, an important meeting of the European Council took place in the city of The Hague (**The Summit of The Hague**). The meeting resulted in forming a common agricultural policy and a regional development policy. The summit demonstrated the willingness of the member states to work together towards more European integration.

**Let’s summarise: Describing the EU using key concepts**

To summarise our understanding of the EU, there are seven key concepts related to the EU we would like to discuss. They are presented in the Table below:

Describing the EU: using 6 keywords	
Principles of democracy	The EU has democratic representation; it is a system with checks and balances, a separation of powers, respect for human rights and the rule of law.
Intergovernmentalism	The EU utilizes a system cooperation between governments in which national governments co-decide the direction and pace of integration in the EU.
Single Market	The EU member states share free movement of goods, services, capital, and people.
Common policy	The EU has common policies in areas such as trade, competition, agriculture, and fisheries, to promote economic growth and stability.
Supranationalism	The EU has EU-level institutions such as the European Commission, the European Parliament and the European Court of Justice for policy-making and integration.
Global actor	The EU plays a major role in international relations, contributing to peace, security, prosperity, with respect for human rights and the rule of law.

Figure 29: Describing the EU: using key concepts; Source: COPE creation'

Think of one additional key concept related to the EU that would fit in this list.

**What did the EU achieve?**

Watch the following YouTube video by Kurzgesagt (courtesy of kurzgesagt.org). After the video you will be asked to write a short essay where you state your opinion regarding the EU. It can help to take some notes during the video. Try to collect four achievements of the EU. Which of the arguments addressed in the video can you relate to the most?



Figure 30: *Is the European Union worth it or should we end it?:*  
Source: Kurzgesagt - In a Nutshell (YouTube)

### Exercise 7:

Take a short moment to reflect upon this Module and the video you just watched. Compose a concise essay (approximately 400 words in length) in which you present a persuasive argument either in support of or against the European Union (EU). Your essay should contain at least one advantage and one disadvantage of the EU. Try to state your arguments as clearly as possible.

As a guideline, use a maximum of 30 minutes to work on this exercise.

Afterwards, compare your essay with the one written by Michael, your colleague from the USA. You can find his essay at the very end of this module.

### *Future Challenges*

Despite its growth to 27 member states and its emergence as a significant player in international affairs, the European Union (EU) is not immune to future challenges. In 2019, the COVID-19 pandemic hit the world, causing significant disruption to the EU's political and economic landscape. The pandemic had a devastating financial impact on the EU, with sharp declines in GDP and widespread job losses. The effects of the pandemic are still being felt, as reflected in the EU's current spending priorities. To address the challenges posed by the pandemic, the EU launched the EU4Health program to improve public health infrastructure and enhance coordination among member states. In addition, the member states allowed the EU to engage in common debt in order to finance the recovery after the pandemic (through the so-called NextGeneration EU program).

You can also find more information on the topic of the COVID-19 pandemic and NextGeneration EU in Module 1.

In addition to the pandemic, the EU also faced significant energy supply challenges in 2021. These challenges were largely related to the ongoing Russian invasion of Ukraine.

The conflict has broader geopolitical implications, as Russia's actions represent a challenge to the post-World War II international order, which is based on the principle of respect for territorial integrity and the prohibition of the acquisition of territory by force. The situation in Ukraine also

contributes to increased tensions between the West and Russia, with implications for European security.

These challenges highlight the need for the EU to strengthen its governance, coordination, and decision-making structures to address future crises effectively. The pandemic and energy supply challenges underscore the importance of developing resilient economic and energy policies, reducing dependence on foreign energy sources, and enhancing regional cooperation. The situation in Ukraine also highlights the need for a united and coherent EU foreign policy, which can effectively respond to security challenges and maintain the principles of international law.

### **Institutional architecture of European Union**

The shape of the **EU's institutions** is the result of several decades of its development, described in the previous section of the module. The complex dynamics of these developments have made it a far from fully coherent system. In practice, however, it very often functions smoothly, based on established patterns of cooperation between the various institutions and their representatives.

There are four main decision-making institutions (and their locations), which lead the EU's administration:

- the European Parliament (Brussels, Strasbourg, and Luxembourg: for Luxembourg only its general secretariat) and Representatives (Delegations across the EU)
- the European Council (Brussels)
- the Council of the European Union (Brussels and Luxembourg)
- the European Commission (Brussels, Luxembourg and National Representatives of the M.S)

These institutions collectively provide the EU with policy direction and play many roles in the law-making process. Their work is complemented by other institutions (Court of Justice of the European Union, European Court of Auditors European Central Bank), several bodies and a wide range of specialised agencies.

[The following YouTube video by Europe Direct Strasbourg](#) demonstrates the institutional architecture of the EU, which will be discussed in more detail later in the module.



*Figure 31: The European Union how does it work?:  
Source: Europe Direct Strasbourg (YouTube)*

Compared to the political systems of individual Member States, it is difficult to speak here of a complete materialisation of the principle of the [tripartite separation of power](#) - into legislative, executive and judicial. This has led and is leading to discussions about the existence (or not) of the **democratic deficit in the EU**. Historically, this has led, for example, to the introduction of direct elections (with universal suffrage) to the European Parliament since 1979.

Some EU institutions operate as supranational institutions, some as intergovernmental. The intergovernmental dimension is expressed in the action of institutions such as the European Council and the Council of the European Union. The existence of the institution of the rotating presidency (chairmanship) of individual states in the work of the EU is also a manifestation of this. The supranational dimension is primarily expressed in the activities of the European Commission, as well as the European Parliament and the EU courts.

You will get to know the most important EU institutions in more detail in the following sections of this module.

### Functioning of EU institutions: European Council



Figure 32: Source: European Union, 2019

The European Council is an EU institution that is a forum for consultation and negotiation between heads of state and government leaders of the Member States. In addition to whom are: the President of the European Council (elected for a period of two and a half years, position introduced in 2009), the President of the European Commission and the High Representative of the Union for Foreign Affairs and Security Policy. The Council currently meets twice during each presidency (March-June and October-December).

In exceptional cases, Extraordinary European Councils or informal meetings are convened. In recent years, for example, Brexit has been the reason for several Extraordinary Councils. The meetings are held in Brussels, although in the past they have been organised by the country holding the presidency at the time.

Between 12 and 13 December 2019, Ursula von der Leyen, President of the European Commission, and the Heads of State or Government of the EU met in Brussels for the European Council hosted by Charles Michel, President of the European Council. On 12 December, EU leaders discussed climate change, the EU's long-term budget and external relations, among other issues. On 13 December, they focused on the economic and monetary union and Brexit.

The European Council was only fully formalised as an EU institution in 2009 (under the Treaty of Lisbon), but the process of its gradual formalisation has been ongoing since the mid-1970s. However, informal summits of member state heads of state had already been held since the early 1960s. This process of institutionalisation is seen as a symptom of the "summitry" trend and a sign of the strengthening of the position of the Member States in the system of EU institutions.

The main objectives of the Council meetings are primarily to define the overall direction of EU development and action. This usually concerns matters such as institutional reforms, enlargement, economic and monetary policy, external relations and other key EU policies. The decisions taken at



summits are then usually translated into action by the other EU institutions, primarily the European Commission and the Council of the EU.

Due to the lack of treaty provisions and the status of participants, the way the European Council operates is less formalised. Participants have relative freedom as to the format of discussions and a large part of the arrangements are based on personal and informal contacts and negotiations.

### **Functioning of EU institutions: European Commission**

The main executive body of the EU is the European Commission, which serves as the guardian of the treaties and of the common European interest. The Commission also plays a key role in the decision-making process in the EU, possessing the monopoly of initiative with respect to supranational legislation.

The Commission as an institution is independent by design. In practice, however, several actions it takes are an extension of decisions taken at European Council level.

The Commission is a collegial body, presenting common proposals and bearing joint responsibility. It is composed of the College of Commissioners from 27 EU countries (1 commissioner per Member Country), led by the President of the Commission. Together, the 27 Members of the College are the Commission's political leadership during a five-year term. The President assigns them responsibility for specific policy areas.

The structures of the Commission include **33 Directorates-General (DGs)**, which can be seen as "ministries", responsible for particular policy areas. It also has various types of agencies that work mainly to prepare and implement specific policies. These are: decentralised agencies, with technical, scientific or management tasks (e.g., European Food Safety Authority, European Environment Agency, Frontex); executive agencies, managing the EU programmes (for example Erasmus+ programme), Euratom Agencies; and agencies under Common Security and Defence Policy (for example European Defence Agency). You can see the full list of DGs and agencies [here](#).

Such highly developed Commission activities require a huge amount of administrative support. There are 32 000 civil servants (including translators, interpreters and researchers) supporting the DGs and providing complementary services (for example press, anti-fraud, legal service). These figures are often taken by opponents of the EU or by Eurosceptics as evidence of the Union's excessive bureaucratic structure.

### **Functioning of EU institutions: European Parliament**

The European Parliament is the EU's only directly-elected institution. This has been the case since 1979, although the Parliament has existed in the system of EU institutions since 1958. Before that, however, its members were representatives of national parliaments.

Elections to the European Parliament are based on national constituencies and electoral arrangements. The number of Members of the European Parliament (MEPs) from each member country depends on the population of that country. Therefore, the highest number of MEPs comes from Germany and the lowest from Malta. After Brexit, the number of MEPs is 705.

MEPs are divided in political groups which are based upon the European party federations.

### Exercise 8:

Look at the list below, guess how many seats each party has!

For example between 2019 and 2024 (after Brexit), the largest factions in Parliament (numbers may change slightly during a legislature) included:

- European People's Party (EPP)
- Progressive Alliance of Socialists and Democrats (S&D)
- Renew Europe (RE)
- Greens / European Free Alliance (G/EFA)
- Identity and Democracy (ID)
- European Conservatives and Reformists (ECR)
- The Left (EUL-NGL)
- Non-inscrits (non-attached)

The solution to this exercise can be found at the very end of this module.

Parliament's plenary sessions are held in Strasbourg and Brussels. You can check the Interactive seating plan of the hemicycle of the European Parliament (in Strasbourg) [here](#). Try to locate some MEPs from your country that you know, using the search engine provided on the website!



Figure 33: EP Plenary session - 14 December 2022; Source: European Union, 2022

The Parliament approves the annual budget in co-decision with the Council of the EU, while the European Council decides on the multi-annual financial perspectives, but only after obtaining the Parliament's consent. In addition, the Parliament is responsible for various control tasks, mostly concerning the European Commission, including: (1) approving the President and College, (2) dismissing the College by an absolute majority vote, and (3) conducting research committees and



asking questions. Finally, and most importantly, the Parliament plays a key role in adopting legislation. It does this in co-decision with the Council of the EU in supranational policy areas, such as the single market, climate, and agriculture.

Undoubtedly, however, the European Parliament's powers are less than those of national parliaments. Some observers see this as a major indicator of the previously mentioned democratic deficit in the EU. This may also contribute to a lower turnout in European Parliament elections than in most national parliamentary elections (although it is worth noting that in the 2019 elections voter turnout increased by 8% and rose above 50% for the first time since 1994).

### **Functioning of EU institutions: Council of the EU**

The Council of the EU (also sometimes called Council of Ministers) represents the governments of EU countries. It is where national ministers (or sometimes other representatives) from each government meet to adopt laws and coordinate policies. The Council of the EU takes decisions on European laws jointly with the European Parliament.

Ministers meet in various configurations depending on the topic to be discussed. There are 10 configurations (or formations) of the Council:

- General Affairs
- Foreign Affairs
- Economic and Financial Affairs
- Justice and Home Affairs
- Employment, Social Policy, Health and Consumer Affairs
- Competitiveness
- Transport, Telecommunications and Energy
- Agriculture and Fisheries
- Environment
- Education, Youth, Culture and Sport

Countries belonging to the Eurozone also meet in the Eurogroup format.

The [following video](#) explains the issue of Council configurations and its modus operandi.



Animation on the Council configurations

Figure 34: *The Council of the EU configurations;*

Source: *European Union, 2016*

### Functioning of EU institutions: Other institutions

Established in 1952, the **Court of Justice of the European Union** is responsible for ensuring EU law is interpreted and applied the same in every EU member state as well as ensuring EU member states and EU institutions abide by EU law. Located in Luxembourg, the structure of the Court consists of: 1) The Court of Justice (27 Judges, one from each EU country plus 11 Advocates-General), 2) The General Court (54 Judges, two from each EU member state).

Established in 1975 in Luxembourg, the **European Court of Auditors** (ECA) works on improving the EU financial management. It has 27 members (one from each EU member state) supported by approximately 800 civil servants. The primary role of the ECA is to externally check if the budget of the EU has been implemented correctly and that EU funds have been spent legally and with sound management.

The **European Central Bank** (ECB) is the central bank of EU member states which use the euro. Based in Frankfurt am Main, Germany, the ECB takes responsibility for EU monetary policy. The Governing Council is the main decision-making body of the ECB. It consists of the six members of the Executive Board, plus the governors of the national central banks of the Eurozone member states.

### Functioning of EU institutions: EU bodies

The **European Committee of the Regions** (CoR) is the assembly of local and regional representatives that provides sub-national authorities with a direct yet advisory impact on the EU's institutional framework. Established in 1994, the CoR has 329 full members and the same number of alternate members. The number from each EU member state reflects the size of its population.

The **European Economic and Social Committee** (EESC) is an EU advisory body established in 1957, comprising representatives of workers' and employers' organisations and other interest groups. It issues opinions on EU concerns to the European Commission, the Council of the EU and the European Parliament, thus operating as a 'bridge' between the EU's institutions and organised civil society. The EESC has 329 members from all EU states.

Established in 2011 the **European External Action Service** (EEAS) manages the EU's diplomatic relations with other countries outside the EU and conducts EU foreign & security policy. Located in Brussels, EEAS supports the EU High Representative in conducting EU foreign and security policy.

The **European Investment Bank (EIB)** is the EU development bank established in 1958. EIB is owned by the EU member states. EIB finances and invests both through equity and debt solutions projects that achieve the policy aims of the EU through loans, guarantees and technical assistance.

The **European Ombudsman (EO)** acts as an independent and impartial body that holds the EU’s institutions and agencies to account and promotes good administration. Established in 1992, the EO helps people, businesses, and organisations facing problems with the EU’s administration.

The **European Data Protection Supervisor (EDPS)** is an independent supervisory authority whose objective is to monitor and ensure that EU institutions and bodies respect the right to privacy and data protection when they process personal data and develop new policies. Established in 2004, the EDPS is located in Brussels.

The **European Data Protection Board (EDPB)** acts as an independent EU body, which contributes to the consistent application of data protection rules throughout the EU, and promotes cooperation between the EU’s data protection authorities. The EDPB is established by the General Data Protection Regulation (GDPR) and is based in Brussels.

**Let’s summarise: System of EU institutions**

**Exercise 9:**

Using Google's search engine, type in 'European Union' and look for the first 10 results in the 'News' category. Read the news items and check how many times the name of each EU institution listed in the diagram appears. Which of these institutions was mentioned the most often and which the least often (or perhaps not at all)? Use a maximum of 15 minutes to work on this exercise. Please enter the results of your analysis in the Table below.

Institution	Number of mentions
Council of the EU	
Court of Justice	
European Central Bank	
European Commission	
European Council	
European Court of Auditors	
European Parliament	

**Note:** institutions are those established by treaties, while bodies or organs are entities established by these institutions.

## Conclusion

The EU has a long history, as you know by now. It all started when the Western Union was created and the EU has grown ever since. Many (inter)national institutions shape the functioning of the EU. You have learned with the help of this module (Module 2) a lot about what the EU is, why it was created and what purpose it serves. You have learned about the member states of the EU. This gives you the means to get a better understanding of EU politics and other EU events that you sometimes read in the news. In the following Modules, you will dive deeper into this matter. First, in Module 3 you will look at EU politics and decision-making, as well as the budget (and how it's used) and the current affairs regarding the EU, such as Brexit. We will see you there!

## Further literature and contact information

For further reading, we recommend the following literature:

Deschouwer, K., & Hooghe, M. (2015). *Politiek: Een inleiding in de politieke wetenschappen*. Boom Lemma uitgevers

McCormick, J. (2014). *Understanding The European Union: A Concise Introduction* (6th ed.). Palgrave Macmillan.

Below you can find the contact information of both authors of this Module:

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**Dr Michal Kuś** received his PhD from the Department of Political Science at the University of Wrocław (2010), presenting the thesis on the political and economic environment of the Spanish audiovisual media market. He has also taught several courses in political communication and journalism. In the period 2010-2013 he coordinated (fully) administrative and (partially) academic activities in the Polish part of the EU framework project the "Media Accountability and Transparency

in Europe" (MediaAct) (FP7). His research focuses on media systems (especially in aspects of media control, ownership, and deregulation), relations between media and politics, media accountability and transparency, and journalism studies. He also works as project director for the European Journalism Observatory (EJO), Polish edition.

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**Dr Kamil Glinka** received his PhD from the Institute of Political Science at the University of Wrocław (2018), presenting the thesis on urban policy and marketing communication in Poland. He has also taught several courses in EU cohesion policy, public governance, marketing and media communication. In the period 2018-2021 he had conducted several international research projects such as "Urban Policy in the Strategic Perspective – from V4 to Ukraine" and "Understanding Identities and Regions. Perspectives on V4 and WB", both financed by the International Visegrad Fund (IVF). He also carried out a project "Urban dimension of European Community's policy – genesis and evolution" at European University Institute (EUI) in Florence (2022). Currently, he holds a position of the coordinator of the project "Urban Post-COVID Recovery in the V4 Countries" implemented within IVF Strategic Grant (2022-2025). His research focuses on cohesion policy, urban and regional governance and media communication. He also works as Bernard Steinacher Fellow 2022-2023 funded by METREX (Network of European Metropolitan Regions and Areas).

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**Dr hab. Adam Szynol** received his PhD from the Faculty of Letters (2003) in the field of daily press in Lower Silesia and quite recently his habilitation in the discipline of Social Communication and Media (2021) presenting the thesis on regional dailies transformation in Poland. As a former journalist he teaches several courses connected to regional/local media, TV language, news and commentary programmes on Polish TV. For more than a decade he was responsible for candidate admissions in the two fields of studies (Journalism and Communication Management) which are at the highest demand as every year there are more than 1000 candidates for each of them. Currently he is the head of the Journalism Department and also the editor-in-chief of "Journalism and Media" journal, listed on the Ministry of Education and Science scoring scientific journals. He is a co-editor of the Polish edition of European Journalism Observatory (EJO).

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## **Solutions for Module 2:**

### **Exercise 1:**

The goal of integration has been to promote peace, prosperity, and stability in Europe by breaking down barriers and promoting cooperation among member states.

### **Exercise 2:**

b-f-a-e-d-c

### **Exercise 3:**

The following members do not use the euro:

Bulgaria, Czechia, Denmark, Hungary, Poland, Romania and Sweden.

### **Exercise 4:**

1. **Political Criteria:** The country must have stable institutions guaranteeing democracy, the rule of law, human rights, and respect for and protection of minorities.
2. **Economic Criteria:** The country must have a functioning market economy and the ability to cope with competition and market forces within the EU.
3. **Ideological Criterion:** The country must agree with the eventual aim of ever closer union.

### **Exercise 5:**

They argue that this places an undue burden on developing countries that may not have fully developed market economies.

### **Exercise 6:**

The six countries were: Belgium, the Netherlands, West Germany, France, Italy and Luxembourg

### **Exercise 7:**

Sample essay:

The European Union (EU) is an economic and political union of 27 member states located primarily in Europe. The EU has been a subject of discussion and debate among policymakers, scholars, and citizens alike. While some view the EU as a beacon of cooperation, peace, and stability, others criticize its bureaucracy, democratic deficit, and lack of sovereignty. In this short essay, I will present a persuasive argument in support of the EU, highlighting some of its advantages and disadvantages.

One of the primary advantages of the EU is economic integration. The EU has created a single market, enabling the free movement of goods, services, capital, and people (Schengen Area) across its member states. This has led to the Eurozone, increased trade and investment, lower prices for consumers, and higher economic growth. Moreover, the EU has established common policies, promoting fair competition and consumer protection. In addition, the EU has provided financial support to its member states, helping them to overcome economic challenges and disparities. Another advantage of the EU is political integration via its Treaties. The EU has created a framework for cooperation and coordination among its member states, enabling them to address common challenges and pursue common goals. This has led to the establishment of a common foreign and security policy, as well as the promotion of human rights, democracy, and the rule of law. Moreover, the EU has



provided a platform for dialogue and negotiation among its member states, helping to resolve conflicts peacefully and avoid war.

On the other hand, the EU also has its disadvantages. One of the main criticisms of the EU is its bureaucracy and lack of transparency. The EU institutions, such as the European Commission and the European Parliament, are often accused of being disconnected from the citizens they represent. Moreover, the decision-making process in the EU is complex and slow, making it difficult to respond to emerging issues and crises in a timely manner. This has led to a democratic deficit, where citizens feel disengaged from the EU.

In conclusion, the EU is a complex and multifaceted supranational entity. While the EU has promoted economic and political integration, it has also faced criticism for its bureaucracy and lack of transparency. Nevertheless, I believe that the existence of the EU is important for promoting peace, cooperation, and prosperity among its member states. Therefore, it is important to address the challenges facing the EU and work towards a more democratic, transparent, and efficient European Union.

#### **Exercise 8:**

- European People's Party (EPP) - **187 seats**
- Progressive Alliance of Socialists and Democrats (S&D) - **148 seats**
- Renew Europe (RE) - **97 seats**
- Greens / European Free Alliance (G/EFA) - **67 seats**
- Identity and Democracy (ID) - **76 seats**
- European Conservatives and Reformists (ECR) - **62 seats**
- The Left (EUL-NGL) - **40 seats**
- Non-inscrits (non-attached) - **28 seats**

## Module 3: Institutions, Structures, and Procedures of the EU – Part 2

### Basic Information

Module number	3
Module title	Institutions, structures, and procedures of the EU – part 2
Duration/study load	8 hours
Keywords	European Union (EU); EU policies; Negative integration, Positive integration, Decision-making in the EU; Principle of subsidiarity, EU law, Multiannual Financial Framework (MFF), NextGenerationEU
Learning outcomes	<p>At the end of the module, students should...</p> <ul style="list-style-type: none"> <li>be able to identify newsworthy issues on the basis of in-depth research</li> <li>be able to reproduce general knowledge as well as specialised knowledge (e.g. understanding how events affect the EU and vice versa) in a field of EU matters</li> <li>be able to distinguish between the main and side issues concerning EU activities</li> <li>be able to interpret the selected information in a field of EU matters</li> </ul>
Description	<p>In Module 3, students will acquire a bit more specific knowledge about the selected fields of the EU activity, related directly or indirectly to EU Cohesion Policy. Thus, along with Module 2, Module 3 prepares students for learning about the EU Cohesion Policy in Module 4.</p> <p>In practice, the following topics will be taught in Module 3: (1) EU policies (governance, policy areas, law and legal issues, policy environment); (2) EU budget (income sources and expenditures, member state funding, decision-making on budgetary matters); (3) current affairs that affect the EU and its cohesion policy (Brexit, large increase in forced displacement since 2015, war in Ukraine and energy crisis, COVID-19 pandemic). A brief introduction to cohesion policy is also included, as a bridge to Module 4.</p>
Sequentiality	Module 3 is intertwined with Module 2. Module 3 also introduces other modules (mainly Module 4).

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## Glossary

European Union (EU)	<p>The European Union is a supranational political and economic entity (Deschouwer &amp; Hooghe, 2015), which operates in some ways as an intergovernmental organisation (McCormick, 2014).</p> <p>Source: <a href="#">CES Carleton (2023)</a></p>
Negative integration	<p><b>Negative integration</b> means removal of tariffs, quantitative restrictions, and other barriers to trade or obstacles to free and undistorted competition.</p> <p>Source: <a href="#">Scharpf (1999)</a></p>
Positive integration	<p><b>Positive integration</b> means measures or institutional mechanisms which are meant to address externalities and other market failures, as well as unwanted side effects from liberalisation and the free flow of production factors and technology.</p> <p>Source: <a href="#">Law Insider (2023)</a></p>
Principle of subsidiarity	<p>The <b>principle of subsidiarity</b> is defined in Article 5(3) of the Treaty on European Union. It aims to ensure that decisions are taken at the closest possible level to the citizen and that constant checks are made to verify that action at the European Union (EU) level is justified in light of the possibilities available at the national, regional or local level.</p> <p>Source: <a href="#">EUR-Lex (2023)</a></p>

**Acronyms**

EU	European Union
MFF	Multiannual Financial Framework
MOOC	Massive Open Online Course
NGEU	NextGenerationEU
VAT	Value Added Tax

## About this module

### Welcome to Module 3 of the COPE MOOC!



While this module can be studied independently, its primary purpose is to equip you with the necessary knowledge and skills to tackle the upcoming modules in this MOOC. Continuing the threads from Module 2, which talked about the history and institutions of the EU, Module 3 focuses on issues related to EU governance and policy areas, decision-making processes, EU law and various aspects relating to the financial dimension of the EU's functioning. In this way, you can gain a comprehensive knowledge of the realities and standards of the EU.

*Figure 35: The flag of Europe with 12 golden stars in a circle; Source: Wikimedia Commons*

In the last part of the module, attention is directed towards current affairs that affect the EU and its EU Cohesion Policy, including Brexit, the COVID-19 pandemic, the War in Ukraine and immigration to the EU. They will help you to understand the current context of the EU institutions' activities. EU activity relates to many policy fields. In some of these, the Union has largely assumed the competences of the Member States, while in others individual competences are shared or activities are coordinated. Each policy has its own distinct decision-making procedure. A good example of this is the processes involved in the creation and application of the EU budget, which we discuss in greater detail in the second part of the module.

Understanding these phenomena is an essential part of gaining an in-depth knowledge of how the EU Cohesion Policy works and how to cover it while reporting on EU matters. To make it easier for you, we use several examples, also shown in graphic form and video. We also add examples of current affairs as mentioned earlier in Section 1.1, paragraph 1, that affect the EU and EU Cohesion Policy, to show the workings of EU institutions and regulations in practice. Module 3 comprises exercises to reinforce your learning as you progress.

Module 4 introduces EU Cohesion Policy, and we highly recommend that you take Modules 2 and 3 before delving into Module 4 to acquire a comprehensive understanding of the EU's basics.

This Module will occasionally refer to additional content from EU websites, where you will find accurate information regarding the EU, albeit that these websites often do not contain criticism towards the EU.

### Introduction to the story of this module

Let's meet Michael! You might have met him in the previous module, but if you haven't here is a short introduction. Michael was born in New York (USA). He is now 21 and after finishing his bachelor's degree in international relations he wants to continue his studies in Brussels. His master's thesis will be related to the Cohesion Policy of the European Union so he has a lot to learn about EU legal frameworks and institutions. In this module, you may join Michael in his journey through the complicated EU legal and budgetary system! Maybe it will be easier for you if you learn it together!

## EU governance and policy areas

The range of policies implemented by the EU institutions has evolved and was closely related to the historical dynamics of European integration processes. Today, we can distinguish five main areas of EU governance and policies - regulatory, redistributive, justice and home affairs, external, and macro-economic.

Michael is a touch confused with the new complicated terms. However, he knows that he will need to apply the terms all in a correct way in his thesis and also in his future work when dealing with publications. Maybe you would help him find the correct answers? You can use an Internet search engine to find correct answers. Use a maximum of 15 minutes to work on this exercise.

### Exercise 1: Match the term with the definition

- a) "Redistributive policies" - ...
- b) "Regulatory policies" - ...
- c) "Justice and home affairs policies" - ...
- d) "External policies" - ...
- e) "Macro-economic policies" - ...

1) ... include rules with respect to the single market and flanking policies such as competition, social policies, and environmental policies (including the external dimension of these policies). The EU has got two categories of regulatory policies: negative and positive integration. Negative integration refers to deregulatory policies by means of abolishing physical, technical and fiscal obstacles for international trade (to create a single market) and fostering international competition (fighting cartels, mergers and state intervention). Positive integration means re-regulatory policies to complement the single market; EU level regulation to compensate for abolished national regulation. It refers to e.g., environmental policy and social policy.

2) ... include allocation of resources from the EU budget to a social group or region, mainly through the common agriculture policy (about 28% of current total EU budget) and EU Cohesion Policy (about 33% of current total EU budget), which are the main foci of the entire MOOC (we recommend strongly Module 4).

3) ... refer to policies to guarantee the economic, social, and political rights of EU-citizens in justice, asylum, migration and police. The EU wants to create an "Area of Freedom, Security and Justice" to guarantee the fundamental rights of its European citizens (civil rights, political rights, economic and social rights).

4) ... refer to Economic and Monetary Union (EMU) policies (including fiscal policies and economic governance).

5) ... include policies of the EU as one single actor towards the rest of the world with respect to trade, development, external security, and defence (European Security and Defence Policy).

The solution to this exercise can be found at the very end of this module.



## Policy environment and competences of the EU and Member States



Figure 36: The Common Agricultural Policy is one of the exclusive competences of EU;  
Source: EC - Audiovisual Service European Union, 2020

In practice the EU and the Member States share power over individual policies to varying degrees.

In some cases, the EU has exclusive competence to regulate the fields concerned. Do you know which fields these are? Please check it out using an Internet search engine. It should take you around 10 minutes. You can then compare the answers you find with the information in the next paragraph. Good luck!

The EU's exclusive competences include: regulation of the Single Market, customs union, external trade, monetary policy (but Eurozone countries only), Common Agricultural Policy price setting and subsidies, and fisheries.

In turn, shared EU and Member States competences relate among others to: social regulation, environment, consumers, public health, cohesion, free movement of persons, transport, and energy. In contrast, some policies are based on coordination between the EU and member states: macro-economic policies, foreign and defence policies, policing and criminal justice, health, culture, education, tourism, youth, sport, and vocational training.

There are also policy fields that remain exclusive Member State competences. In practice, these are all those not mentioned so far. The most relevant of these are taxation and public spending, including social security.

In this context, it is also worth noting that the EU applies the **principle of subsidiarity**. It means that in areas in which the EU does not have exclusive competence, the principle of subsidiarity seeks to safeguard the ability of the Member States to take decisions and action on their own. The principle also authorises intervention by the Union when the objectives of an action cannot be sufficiently achieved by the Member States, but can be better achieved at Union level, "by reason of the scale and effects of the proposed action".

This means that, currently, none of the five main areas of EU governance and policies mentioned in the previous section (regulatory policies, redistributive policies, justice and home affairs policies, external policies and macro-economic policies) is the exclusive domain of the EU institutions.

### Decision-making in the EU

This differentiated distribution of competences across policy areas also translates into decision-making procedures across the EU.

There are basically three main groups of decision-making procedures within the EU: supranational, intergovernmental and delegated.

**Supranational decision-making** is based on the fact that the Member States of the European Union have agreed, as a result of their membership of the EU, to transfer some of their powers to the EU institutions in specified policy areas. Thus, EU institutions make supranational binding decisions in their core procedures:

- the ordinary legislative procedure,
- the budgetary procedure,
- the conclusion of international trade-type agreements,
- some quasi-constitutional decisions (the definition of the own resources' system, the election of members of the European Parliament and its Statute, amendments to the Statute of the Court of Justice).

You can find more details [here](#).

**Intergovernmental decision-making** is used in the fields of the Common Foreign and Security Policy (CFSP), as well as in several other fields such as enhanced cooperation, certain appointments and treaty revision. This decision-making procedure is different from that prevailing in the ordinary legislative procedure. The dominant feature in these fields is a stronger component of intergovernmental cooperation. For example, the challenge of the public debt crisis has provoked an increased use of such decision-making mechanisms, notably in the framework of European economic governance. It's worth to mention, that European Parliament has reduced or even non-existent role in this context. You can find more details [here](#).

**Delegated decision-making** is related to procedures used to establish secondary legislation (see the section "EU law and legal system" of this module for more details concerning primary and secondary legislation in the EU). The European Commission may be granted the mandate to establish delegated acts, but only if primary legislation allows for it and only within the boundaries set by the primary legislation. These procedures are described in more detail [here](#).



*Figure 37: European Commission is a key actor in EU decision making; Source: Wikimedia commons*

## EU law and legal system

All the historical decision-making processes in the EU have led to the development of a system of EU law. It should be noted that the EU is a source of law.

Every action taken by the EU is founded on the treaties. These binding agreements between EU member states set out EU objectives, rules for EU institutions, and the relationship between the EU and its member states. Treaties are the starting point for EU law and are known as the **primary source of law**. The law that comes from the principles and objectives of the treaties is known as the **secondary source of law**. Secondary law is initiated by the European Commission and adopted in co-decision by the European Parliament and the Council of the European Union. More details on these and other EU institutions can be found in Module 2.

To conclude the EU legal system is divided into three parts:

- primary legislation - the treaties and general legal principles,
- secondary legislation (based on the treaties: regulations, directives, decisions, recommendations and opinions),
- supplementary law (composed of: EU case law coming from the decisions of the Court of Justice and the Court of First Instance; international law (always taken into consideration by the courts when considering case law); the EU general principles of law).

The **treaties** have from time to time been amended to reform the EU institutions and to give them new areas of responsibility. They have also been amended to allow new EU states to join the EU. The treaties are negotiated and agreed by all the EU states and then ratified by their parliaments, sometimes following a referendum. See more: [here](#) and Module 2 of our MOOC.

**Regulations** are legal acts that apply automatically and uniformly to all EU states as soon as they enter into force, without needing to be transposed into national law. They are binding in their entirety on all EU states.

**Directives** require EU states to achieve a certain result, but leave them free to choose how to do so. EU states must adopt measures to incorporate them into national law (transpose). Transposition into national law must take place by the deadline set when the directive is adopted.

**Decisions** shall be binding holistically. A decision which specifies those to whom it is addressed (i.e., specific Member States) shall be binding only on them.

**Recommendations** allow the EU institutions to make their views known and to suggest a line of action without imposing any legal obligation on those to whom it is addressed. It is worth mentioning that they have no binding force.

**Opinions** are instruments that allow the EU institutions to make statements, without imposing any legal obligation on the subject of these opinions. What is important is that opinions have no binding force.

You can find more information about sources and scope of European Union law [here](#).

## EU policies and decision-making

There are 3 main institutions involved in EU decision-making:

1. the European Commission, representing the EU's overall interests,
2. the European Parliament, representing EU citizens,
3. the Council of the European Union, representing EU governments.

EU policies are typically decided through the **ordinary legislative procedure** (formerly known as the "co-decision" procedure). This is a process where the three main institutions come to agreement on legislation. Please find the details [here](#).

However, there are some specific situations when **special legislative procedures** are required. Please find the details [here](#).

What is important, The European Commission's better regulation agenda allows individuals, businesses, stakeholders, national authorities and other organisations to contribute to EU policy making. You can have your say through:

1. public consultations (questionnaires) published on the Have your say portal (check it [here](#)),
2. the European citizen's initiative that allows one million individuals residing in one quarter of the member countries to invite the European Commission to propose legislation,
3. SINAPSE e-communities that allows experts to share knowledge across the EU,
4. the Conference on the Future of Europe (citizen-led series of debates and discussions that ran from April 2021 to May 2022).

## The EU budget: An Introduction

In this Chapter, we will learn about the EU budget and works: where the money comes from and how it is spent. But how did the budget come to be? Why is the budget important? How does the EU obtain its revenue? Who decides how the budget is spent? Do less wealthy member states receive more financial aid? These are some of the questions we will be answering in this chapter.

The EU budget is the financial plan of the EU and outlines the amount of money that the EU can spend each year, and how it will be allocated across various policy areas and initiatives. Moreover, the budget is decided upon by the European Parliament and the Council of the European Union (based on a proposal from the Commission). The EU's budget is one of the primary influences on policy while it affects both policy options and the effectiveness of the policies the EU pursues (McCormick, 2014). Therefore, how and where money is spent becomes more important than how much money is raised. Before diving into the details of the EU budget, let us take a look at the current budget for 2023.

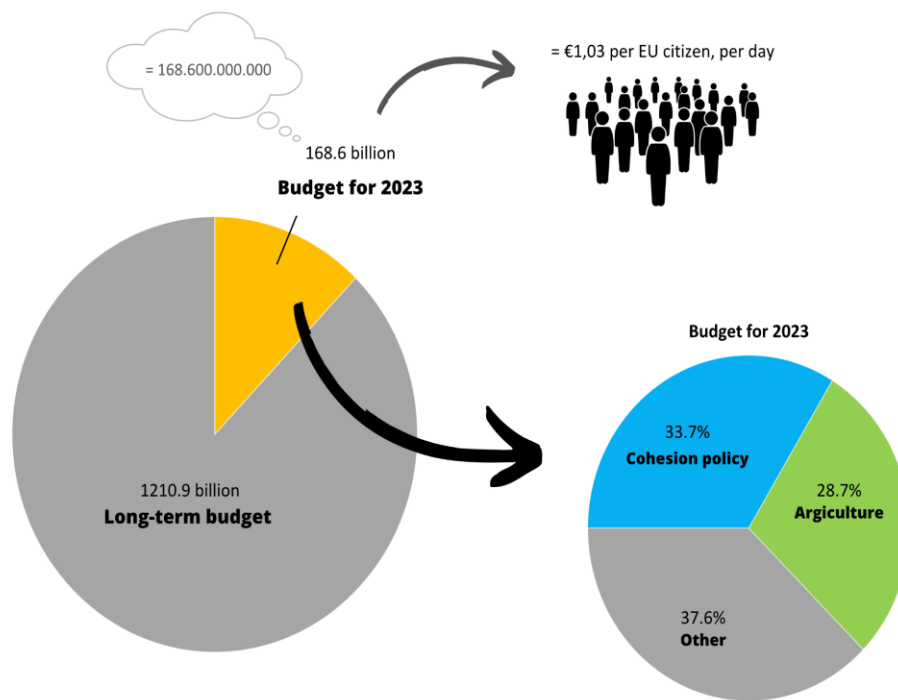


Figure 38: EU Budget for 2023; Source: COPE creation

In 2023, the EU has a budget of €168.6 billion. This means a budget of €1,03 per EU citizen per day. In 2023, 33.7% of the budget goes to cohesion policy[1] and 28.7% goes to agricultural policy. In 2023 specifically funds were allocated for: (1) Ukraine (to support students and teachers via Erasmus+[2], humanitarian aid, and the Asylum, Migration and Integration Fund), (2) energy and climate (the Horizon Europe Program[3], and the Connecting Europe Facility[4]), and (3) for the consequences of the COVID-19 pandemic (for the EU Civil Protection Mechanism[5], and the Rights and Values Program) (Wahl, 2022). Here, you can find additional information on the above mentioned items:

1. The EU's Cohesion Policy promotes economic, social and territorial cohesion among member states. It aims to reduce disparities between regions and promote sustainable growth. This will be discussed in more detail in Module 4.
2. Erasmus+ supports education, training, youth, and sports activities in Europe (it was established in 2014). Michael is a huge fan of the Erasmus+ programme. Indeed, Michael would like to go on Erasmus+ himself. Have you heard of Erasmus+ before? Take a look at [this website](#) to learn what it's about. For how long can you travel abroad?
3. Horizon Europe is the largest research and innovation funding program in the EU, designed to support research and innovation across a wide range of scientific and technological fields.
4. The Connecting Europe Facility supports the development of sustainable trans-European networks in the areas of transport, energy, and digital infrastructure (established in 2014).
5. This is a framework for cooperation and coordination between EU member states, related to civil protection. The EU Civil Protection Mechanism aims to ensure that Europe is better prepared to deal with disasters and emergencies.

Feel free to also look [here](#).

## EU budget: Where does the money come from?

The EU budget is composed of two main sources: contributions from its member states, based on their Gross National Income (GNI) (approximately 70% of the budget), and independent sources of revenue (approximately 30% of the budget). The second category includes: (1) resources based on customs duties, (2) income from non-recycled plastic packaging waste, (3) contributions based on the value added tax (VAT) collected by member states, (4) collected fines and taxes on salaries of EU officials.

You can find more details [here](#).

### Exercise 2:

Michael has already found a lot of responses to open questions related to EU Cohesion Policy. Now he wants to know which Member State is the biggest contributor to the EU budget. Help him find it out! You can find the answer on [this website](#) (you may notice that the UK is still mentioned in this list).

The solution to this exercise can be found at the very end of this module.

The allocation of funds has been a subject of heated political debate, with each member state contributing an amount proportional to its GNI. Wealthier countries contribute more than poorer countries, leading to disputes over the fairness of the distribution. For instance, when Margaret Thatcher became Prime Minister, she argued that Britain, being a country with a high GNI, contributed an unfair share of the budget while receiving insufficient benefits in return (McCormick, 2014). During the European Council of 1979, she famously said "I want my money back". After much debate, Thatcher succeeded in reducing Britain's contributions to the EU budget and increasing the amount of money redistributed to Britain.

It is important to note that Brexit (which will be discussed more in the section "Current affairs: Brexit" of this module) had a significant impact on the EU budget as the UK was one of the largest contributors to the budget due to its high GNI. Approx. 75 billion EUR was lost after losing the UK's contributions. Therefore, the EU had to adjust its budget and fill the financial gap caused by the UK's departure.

## EU budget: Where does the money go?

The EU budget is subject to annual review in order to ensure that it is spent effectively and efficiently. Many institutions are involved in this decision: (1) the European Commission, (2) the European Parliament, (3) the Council of the European Union, and (4) the European Court of Auditors. This means that all representatives of the member states are involved in the decision-making process!

Member states can also request funding from the EU budget for local projects or initiatives, through the EU's various funding programs such as the European Structural and Investment Funds. The European Commission provides an online database with all the (to be) funded projects per member state called [Kohesio](#). This database is especially relevant to find concrete and correct information regarding EU projects.

Look at the database and find how many projects there are in Brussels, the capital of the EU. The answer is probably between 800 and 900 projects in 2023.

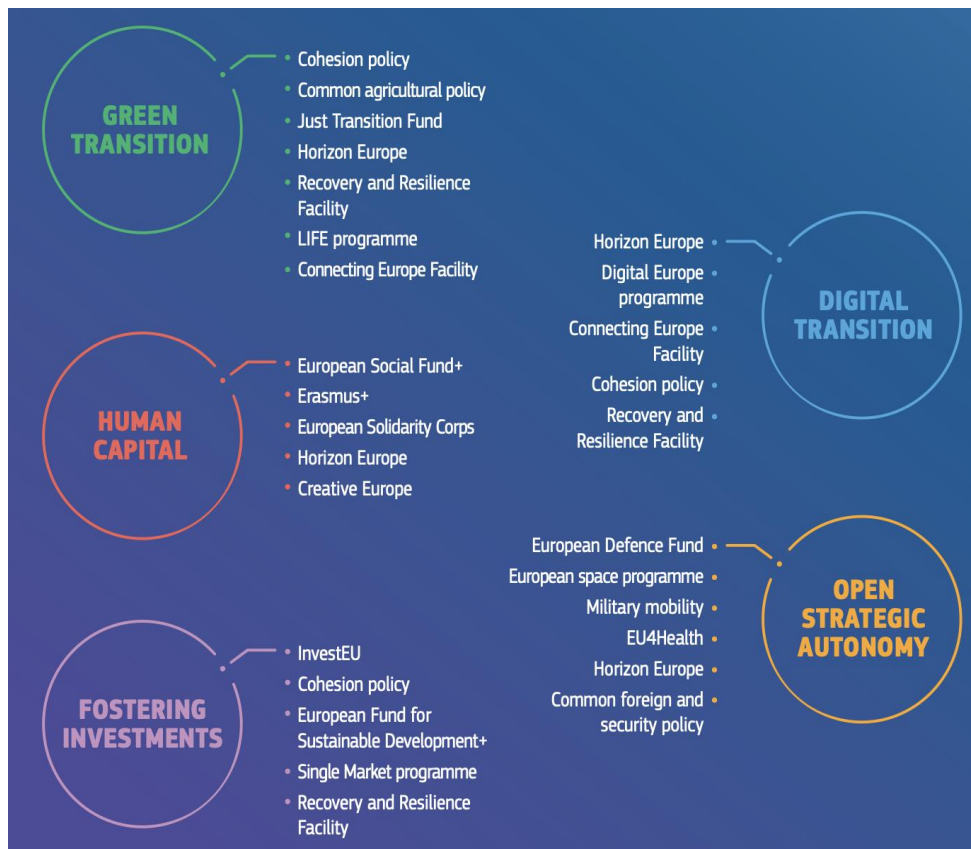


Figure 39: Budget expenditures in five categories; Source: European Council

### Exercise 3:

Look at the YouTube video below. Try to find an answer to the following two questions:

1. The MFF is a multiannual budget for how many years?
2. How much budget does the EU lose with the departure of the UK?
3. Who are the frugal 4?
4. What do 'the frugal 4' want?

When you are ready you can check if you got them all! The solution to this exercise can be found at the very end of this module.





Figure 40: *The EU budget explained*; Source: EURACTIV

## EU budget: Multiannual Financial Framework and NextGenerationEU

The EU budget is always set for a period of seven years. This is known as the Multiannual Financial Framework (MFF). The current MFF extends from 2021 to 2027. The MFF defines how much funding will be available for each category and policy area. We will discuss the main categories of the MFF. Look at the following website before you continue: [here](#). In the report, look up the budget of the MFF.

1. First, we have the category "Natural Resources and Environment". This category aims to support farmers in the EU and ensure a stable supply of (affordable) food. It accounts for the agricultural and maritime policy, as well funding for climate action and the environment. This category accounts for the largest percentage of the total budget.
2. Second, we have the second largest category: "Cohesion, Resilience, and Values". The Cohesion Policy is a very important category in the MFF. The Cohesion Policy aims to reduce economic and social disparities between disparate member states. Member states or regions that are less wealthy (e.g. Poland) receive more funding than regions with a higher GNI. This category also includes the Erasmus+ project and the European Social Fund+ (ESF+). As mentioned before, the Cohesion Policy will be discussed in more detail in Module 4.
3. Third, we have "Single Market, Innovation and Digital". This category accounts for research and innovation in the EU, such as the Horizon Europe project, as well as the European Fund for Strategic Investments. This category also includes the European Space Program and funding for the Single Market.
4. Fourth, there is the category of "Neighborhood And The World" which includes funding for External Action: International Cooperation (with non-EU countries) and Humanitarian Aid.
5. Fifth, we have "European Public Administration" which provides funding for administrative expenditures of the EU's institutions, the European Schools and Pensions.
6. Sixth, we have "Migration, And Border Management" to address migration, provide asylum and funding for integration.

- The seventh and last category is "Security And Defence" to provide funding for the Internal Security Fund, the Nuclear Decommissioning, the European Defence Fund and Military Mobility.

A detailed overview can be found: [here](#).

In 2020 the Member States decided to almost double the EU budget by the NextGenerationEU funding. The aim is to help Member States finance the cost of policies to recover from the pandemic (such as investment in digital economy and energy transition). It is funded by common debt by EU member states. This means that the EU (and not the member states individually) borrowed money on the international financial market and made this money available through grants and loans to the member states.

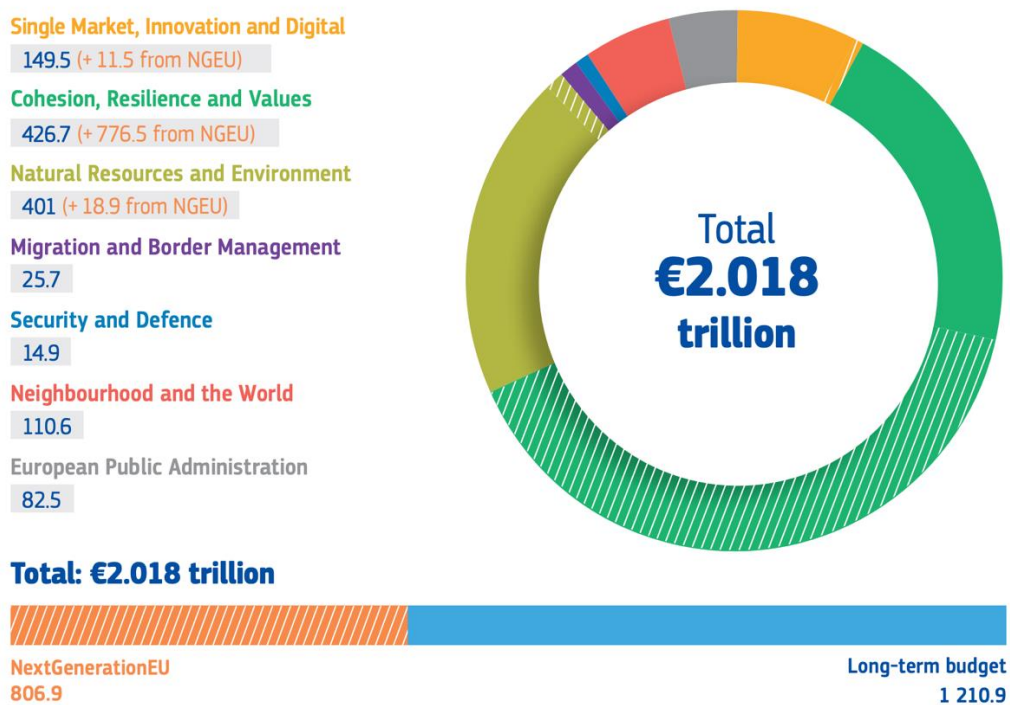


Figure 41: EU MFF 2021-2027; Source: European Council

## EU budget: A matter of political debate

Now that we have covered the basics of the EU budget, we will look at the political debate concerning the budget.

The EU budget has been a topic of political debate since the beginning of the EU. In short, the budget reflects the **priorities** of the EU and determines how much money is available to spend on various policy areas. The budget is a subject of intense political debate because it affects every member state's financial contributions to the EU and the amount of funding each member state receives.

We can distinguish a few areas of debate, and will discuss three of them:

First, there is the **budget size**. Some member states argue that the budget should be reduced to reflect the austerity measures that many countries had to implement in response to the economic difficulties in recent years. Other member states argue that the budget should be increased to support the EU's

policy objectives, such as combating climate change, investing in research and innovation, and promoting economic growth.

Second, there is the **distribution of funds**. Some member states argue that the current distribution of funds is unfair, with some countries receiving more funding than others. Some member states contribute more to the EU budget than they receive, they are called "net contributors". The members who receive more than they contribute are the "net recipients". The general idea is that some member states need these funds more than others. Likewise, some member states argue that the allocation of funds should reflect the needs of each member state and that certain regions or policy areas require more funding than others. Consequently, net contributors are calling for a greater say in how the EU funds are allocated among its members.

Third, there is debate over the **allocation of funding** to specific policy areas. Some member states prioritize certain policies, such as agriculture or regional development, while others advocate for increased funding for areas such as research and innovation or climate action. Civil society groups and other stakeholders also weigh in on the debate, advocating for funding for areas such as education, health, and social inclusion.

Additionally, in recent years the EU budget debate has also been influenced by other political trends, such as the rise of populist and nationalist movements in Europe. Such movements have questioned the value of EU membership and called for a reduction in EU spending. As a result, this created additional tensions within the EU.

We can summarize that the debate over the EU budget is complex, with various member states holding disparate views on the size, distribution, and allocation of funding. These views are also reflected in EU news coverage. It is therefore very important to compare many news sources (from the EU's countries). For example, with Brexit, the UK's views on the matter were in direct contrast to the views of some of the other Member States - and this is reflected in their news coverage. The EU budget is a crucial component of the Union's **governance** and plays a vital role in shaping the future of the EU. As such, the debate over the EU budget will remain relevant in the foreseeable future.

### **Current affairs: Brexit**

The unprecedented event of an exit from the EU by a member state - namely the UK (as a result of the referendum held on the issue in June 2016) - has triggered a whole range of consequences and has become a key factor influencing the EU's activities over the past few years.

The effects of Brexit on the EU budget were described in an earlier chapter, so here we will look at other effects of the event.

Primarily, since 2021 the UK has left the EU single market and customs union. Among other things, EU customs and tax law ceased to apply in the UK. There were checks on goods at the EU border with the country, administrative requirements in the area of customs and border clearance were introduced. However, the EU-UK Trade and Cooperation Agreement contains preferential arrangements in areas such as trade in goods and services, digital trade, intellectual property, public procurement, aviation and road transport, energy, fisheries, social security coordination, law enforcement and criminal justice cooperation, thematic cooperation and participation in EU programmes. The agreement is based on provisions ensuring a level playing field and respect for fundamental rights. Nevertheless, the level of economic cohesion between EU countries and the UK is undoubtedly declining.

In addition, the UK's exit from the EU means a reduction in the Union's potential as a global geopolitical actor, because one of the EU's largest countries (economically and militarily) has departed. This has and will have an impact on the shape and direction of the European Security and Defence Policy.

#### **Exercise 4:**

Michael is really wondering why the UK has decided to leave the European Union. Do you know the arguments of Brexit supporters? Let's have a quiz!

1. Leaving the EU would give the UK less national sovereignty and control for independent decision making: TRUE/FALSE
2. The UK was concerned that they had limited control over immigration, the influx could impact job competition: TRUE/FALSE
3. The UK wanted to negotiate its own trade deals instead of following the bureaucratic regulations of the EU: TRUE/FALSE
4. The UK wanted to leave because they were forced to implement the EURO instead of the POUND: TRUE/FALSE

The solution to this exercise can be found at the very end of this module.

The UK decision to leave the EU has triggered discussions on EU membership in other member states. However, when it became obvious that Brexit had quite a few negative outcomes for the UK at least some eurosceptic countries became less inclined to leave the EU themselves - being afraid to suffer the same negative consequences.

#### **Exercise 5:**

Now that we are talking about Brexit, it could be valuable to look at how other countries feel. Which countries have considered leaving the EU in the past? Read [the following article](#) by The Guardian, take special notice of the graph in this article.

Michael was particularly interested in getting answers to two questions:

1. Which country was most likely to leave the EU in 2016?
2. Which country is the second most likely to leave the EU in 2020 according to the poll in the article?

Please answer them! The solution to this exercise can be found at the very end of this module.

Apart from the countries mentioned in the article Greece also considered leaving in 2015. During the Greek debt crisis in 2015, there were discussions and debates about Greece potentially leaving the EU and abandoning the Eurozone. The possibility of a "Grexit" was a topic of intense speculation, but ultimately Greece remained in the EU and the Eurozone after reaching an agreement with its creditors.

## Current affairs: Large increase in forced displacement since 2015

The increase in migration around 2015 was caused by civil wars and other conflicts. According to Eurostat EU member states received more than 600.000 asylum applications in 2014. In addition the Libyan civil war and the war in Iraq contributed to the increase in forced displacement. Thus, most people who arrived in Europe in 2015 were refugees fleeing war and persecution. Also ongoing conflicts in Somalia and in Afghanistan fuelled the increase in asylum applications.

EU member states reacted with mixed opinions. Some politicians, such as former French president Nicolas Sarkozy argued that the Schengen agreement on borderless travel should be replaced to provide border checks for non-EU citizens. Theresa May, British Home Secretary (2010-2016), was also opposed to welcoming refugees in Europe. Sergei Stanishev, President of the Party of the European Socialists (2011-2022) argued: "[...] we cannot deny people the right to look for a more hopeful future in a safer environment" (PES, 2015). As such, the EU invested heavily in accommodating refugees and asylum seekers, particularly in Greece, Italy and Spain. The increase in forced displacement did however expose the limitations of the EU's ability to respond to crises effectively, and highlighted the need for greater cooperation and burden-sharing among member states. Moreover, instances of xenophobia, racism and violence against refugees have been observed. Read the testimonial of Chinyere Stella Okunna—Professor at the Department of Mass Communication at Nnamdi Azikiwe University, Nigeria—on page 59 of [this report](#).

### Exercise 6:

Answer the following question: Do testimonials help others to develop a better understanding of migrants? What do you think? Try to reflect on this.

The solution to this exercise can be found at the very end of this module.

## Current affairs: COVID-19 pandemic

Since the outbreak of COVID-19 pandemic in January 2020, the EU has been working together with its member states to protect the health and the lives of EU citizens.

The European Commission is coordinating a common **EU response to the COVID-19** outbreak during both the pandemic as well as the post-pandemic period. Therefore it is worth mentioning there were many actions conducted in many EU policies areas, eg. public health, travel, jobs and economy, transportation, research and innovations. [Here](#) you can find the detailed timeline of the most important actions.

In addition to fighting the devastating consequences of the COVID-19 pandemic, the EU is currently implementing the **EU recovery plan**. We have already mentioned NextGenerationEU is the most important aspect is that the EU's long-term budget coupled with NextGenerationEU, the temporary instrument designed to boost the recovery, form the largest stimulus package ever financed in Europe.

Many EU citizens were also displeased with the EU institutions helped to handle the COVID-19 pandemic. First, an important criticism was the initial perceived lack of coordination among EU member states in responding to the pandemic. There were concerns that member states pursued unilateral actions, such as imposing border controls and export bans on medical supplies, without

sufficient consultation or coordination with other EU countries. This led to disruptions in the internal market and hindered the smooth flow of essential goods and services across borders.

Second, the Commission also faced criticism over the speed and effectiveness of its vaccine procurement and distribution strategy. Critics argued that the EU's centralized approach to negotiating vaccine contracts on behalf of member states resulted in delays and a slower rollout compared to some other countries. There were concerns about vaccine shortages and discrepancies in distribution among member states, leading to frustration and uneven vaccination rates across the EU.

Third, communication and transparency were areas of concern during the pandemic. Critics argued that the EU's messaging and information dissemination were not always clear, consistent, or timely. There were calls for greater transparency in decision-making processes and better communication of guidelines and recommendations to member states and the public.

The challenges faced during the pandemic have prompted discussions about the need for a more integrated and resilient EU health strategy in the future.

**Exercise 7:**

Take a look at the article from the Guardian: [here](#).

Which Europeans were most displeased with the EU during the pandemic?

The solution to this exercise can be found at the very end of this module.

It is also interesting to check out Module 8 and 9 where the consequences of the COVID-19 pandemic are discussed in more detail.

The activities carried out under NextGenerationEU are aimed at achieving five general objectives:

- Make it Green,
- Make it Digital,
- Make it Healthy,
- Make it Strong,
- Make it Equal.

### **Exercise 8: Find the data**

You can find more about the EU post-pandemic recovery [here](#). Use a maximum of 15 minutes to work on this exercise.

After reading these materials answer following questions:

1. What is the Multiannual Financial Framework 2021-2027 total allocation?
2. What is NextGenerationEU total allocation?
3. What are the three main areas of NextGenerationEU activities?

The solution to this exercise can be found at the very end of this module.

### **Current affairs: War in Ukraine and Global Energy Crisis**

The Russian invasion in February 2022 has triggered enhanced cooperation among member states in the area of foreign affairs, in particular security and defence. Examples include several packages of sanctions against Russia and Russian individuals, common purchase of weapons to be supplied to Ukraine, a renewed discussion to establish more integrated military cooperation, and the prospect of Finnish and Swedish NATO membership (as a result of which Finland became a member of NATO on 4 April 2023 and Sweden is close to completing the process).

Russia's war against Ukraine has strongly affected energy and food markets in Europe and around the world. EU countries are closely coordinating to prevent price increases and supply shortages.

In the second half of 2021 and in 2022, energy prices in the EU and worldwide rose sharply and were waving afterwards. Russia's unprovoked and unjustified aggression against Ukraine has caused an additional increase in fuel prices and raised concerns about the security of energy supply in the EU. The situation has been further aggravated by Russia's decision to suspend gas supplies to some EU Member States.

### **Exercise 9:**

Michael didn't know about the impact that the war in Ukraine has on the EU energy market. Help him find out the most important consequences of the war. Here is a quiz to help him memorize.

1. The war in Ukraine decreased the budget for security and defence: TRUE/FALSE
2. The war in Ukraine lead to a price increase for gas in Europe: TRUE/FALSE
3. The war in Ukraine made products in the supermarket cheaper: TRUE/FALSE
4. In 2022 the EU was not dependent on Russian gas supplies: TRUE/FALSE
5. The EU allocated additional funds for humanitarian aid since the war in Ukraine: TRUE/FALSE

The solution to this exercise can be found at the very end of this module.





In the Versailles Declaration of March 2022, the leaders of the 27 Member States (see photo below) agreed that the EU should be made independent of Russian fossil fuel imports as soon as possible.

*Figure 42: The leaders of the 27 Member States who signed the Versailles Declaration of March 2022;  
Source: EC - Audiovisual Service European Union, 2022*

On 30-31 May 2022 the European Council decided that by the end of 2022 the EU would stop importing almost 90% of its oil from Russia. The temporary derogation applies to oil delivered by pipeline.

Taking into account the different energy mixes of member states and national conditions and circumstances, EU leaders called for:

- further diversification in energy supply sources and routes,
- promote renewable energy sources more rapidly,
- further improve energy efficiency,
- improve the interconnection of gas and electricity networks.

A detailed description of these activities can be found [here](#).

Such an abrupt change in energy raw material supply chains is clearly not a simple matter. It requires coordinated action and strong political will to bring about these changes, which are often painful for many people in the short term.

The EU's actions in this area have shown that consistent joint action can help solve this important problem. Proof of this can be seen in the fact that the predicted huge problems with Europe's energy supply (primarily gas) in the winter of 2022-2023 largely did not happen. Prices on European energy exchanges calmed down in the meantime.

### **Introduction to EU Cohesion Policy - a brief view**

One of the main responses to the challenges facing the EU, as described in this section of the module, is the new EU Cohesion Policy, planned for 2021-2027, under the MFF. Its objectives are directly related to combating the adverse effects of the events mentioned, primarily post-COVID recovery, a new energy policy, and partly also to Brexit and migration issues.

You will have the opportunity to follow these issues in the following modules of our course, especially Module 4 and Module 5.



## Conclusion

We are coming to the end of Module 3. We hope that it has introduced you to the main mechanisms of the EU's operation, mainly related to the processes of decision-making, law-making and setting and implementing the EU budget. We have also tried to familiarise you with the key developments of recent years affecting the dynamics of the EU.

All these issues are crucial for the planning and implementation of the EU Cohesion Policy, which you can learn about in the next module of our MOOC.

## Further literature and contact information

For further reading, we recommend the following literature:

McCormick, J. (2014). *Understanding The European Union: A Concise Introduction* (6th ed.). Palgrave Macmillan.

Below you can find the contact information of authors of this Module:

**Dr Michał Kuś** received his PhD from the Department of Political Science at the University of Wrocław (2010), presenting the thesis on the political and economic environment of the Spanish audiovisual media market. He has also taught several courses in political communication and journalism. In the period 2010-2013 he coordinated (fully) administrative and (partially) academic activities in the Polish part of the EU framework project the "Media Accountability and Transparency in Europe" (MediaAct) (FP7). His research focuses on media systems (especially in aspects of media control, ownership, and deregulation), relations between media and politics, media accountability and transparency, and journalism studies. He also works as project director for the European Journalism Observatory (EJO), Polish edition.

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**Dr Kamil Glinka** received his PhD from the Institute of Political Science at the University of Wrocław (2018), presenting the thesis on urban policy and marketing communication in Poland. He has also taught several courses in EU cohesion policy, public governance, marketing and media communication. In the period 2018-2021 he had conducted several international research projects such as "Urban Policy in the Strategic Perspective – from V4 to Ukraine" and "Understanding Identities and Regions. Perspectives on V4 and WB", both financed by the International Visegrad Fund (IVF). He also carried out a project "Urban dimension of European Community's policy – genesis and evolution" at European University Institute (EUI) in Florence (2022). Currently, he holds a position of the coordinator of the project "Urban Post-COVID Recovery in the V4 Countries" implemented within IVF Strategic Grant (2022-2025). His research focuses on cohesion policy, urban and regional governance and media communication. He also works as Bernard Steinacher Fellow 2022-2023 funded by METREX (Network of European Metropolitan Regions and Areas).

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**Dr hab. Adam Szynol** received his PhD from the Faculty of Letters (2003) in the field of daily press in Lower Silesia and quite recently his habilitation in the discipline of Social Communication and Media (2021) presenting the thesis on regional dailies transformation in Poland. As a former journalist he teaches several courses connected to regional/local media, TV language, news and commentary programmes on Polish TV. For more than a decade he was responsible for candidate admissions in the two fields of studies (Journalism and Communication Management) which are at the highest demand as every year there are more than 1000 candidates for each of them. Currently he

is the head of the Journalism Department and also the editor-in-chief of "Journalism and Media" journal, listed on the Ministry of Education and Science scoring scientific journals. He is a co-editor of the Polish edition of European Journalism Observatory (EJO).

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**Peter Bursens** is the coordinator of the Jean Monnet Centre of Excellence STRATEGO at the University of Antwerp. STRATEGO organises interdisciplinary research and teaching in the area of EU governance, trust and sustainability. He is a professor at the Department of Political Sciences of the University of Antwerp. He is a senior member of the Politics and Public Governance research group and co-promoter of the GOVTRUST Centre of Excellence. He studied Political Science and International Relations and received a PhD from the University of Antwerp (1999) for his dissertation on lobby-configurations in the European Union. His research agenda focuses on European decision-making, Europeanization, federalism and democratic legitimacy of multi-level political systems. He is the author of many international journal articles and book chapters. Furthermore, he teaches the topics of European Integration and Multilevel Political Systems at the Bachelor level in Political Science, at the Master's level in Political Science and the Master's level in International Relations and Diplomacy, all hosted by the Department of Political Science at the University of Antwerp.

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**David Walewijns** graduated in 2021 with a Master's degree in Communication Studies from the University of Antwerp. Since 2021, he has been working at the AP University College of Applied Sciences in Antwerp. As of 01/10/23 he works as a PhD-researcher and teaching assistant at the University of Antwerp. His research interests span several areas, including (social) media, journalism, Virtual Reality, digital games, persuasive communication, digitization, and marketing.

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### **Solutions for Module 3:**

#### **Exercise 1:**

a – 2 , b – 1 , c – 3, d – 5, e – 4.

#### **Exercise 2:**

The biggest contributor is Germany.

#### **Exercise 3:**

1. Up to 7 years
2. The EU has 12 billion euro less to spend each year due to Brexit
3. The Netherlands, Sweden, Denmark, and Austria
4. They argue that the EU could diminish the budget that is allocated for regional development (traditional policies such as the Cohesion Policy) in order to free up more money for migration, fighting climate change and increasing innovation in the EU.

#### **Exercise 4:**

1. False
2. True
3. True
4. False

#### **Exercise 5:**

1. Italy
2. Sweden

#### **Exercise**

**6:**

Testimonials can positively affect attitudes towards migrants. Testimonials provide personal stories and experiences that can humanize migrants and challenge negative stereotypes or preconceived notions. When individuals share their firsthand accounts of migration, their struggles, achievements, and contributions to society, it can create empathy and understanding among the general public.

#### **Exercise 7:**

France

#### **Exercise 8:**

1. Multiannual Financial Framework 2021-2027 total allocation: €1 210.9 billion
2. NextGenerationEU total allocation: €806.9 billion
3. NGEU supports activities carried out in the following areas:
  - a. Single market, innovation and digital (€11.5 billion),
  - b. Cohesion, resilience and values (€776.5 billion),
  - c. Natural resources and environment (€18.9 billion).

**Exercise 9:**

1. False
2. True
3. False
4. True
5. True

# Module 4: EU Cohesion Policy

## Basic information

Module number	4
Module title	EU Cohesion Policy
Duration/study load	8 hours
Keywords	Cohesion Policy, European Union Investment Funds, European Regional Development Fund, Cohesion Fund, European Social Fund, Just Transition Fund, Agenda 2000, Lisbon Strategy
Learning outcomes	<p>At the end of the module, students should:</p> <ol style="list-style-type: none"><li>1. L.O 1. Be able to reproduce general knowledge as well as specialised knowledge in a field of EU Cohesion Policy</li><li>2. L.O 2 Be able to explain what is relevant for audiences for news concerning EU Cohesion Policy</li><li>3. L.O 3 Be able to evaluate EU and other sources and present information in an effective journalistic form.</li><li>4. L.O 4 Be able to identify multiple perspectives on an issue, coming from relevant actors</li></ol>
Description	Module 4 is an introduction to EU Cohesion Policy. It examines its historical development Policy (1957-2020) and discusses the New Cohesion Policy 2021-2027, with emphasis on (a) policy objectives and investment priorities and (b) the funding instruments (e.g., European Regional Development Fund, Social Funds Plus, Cohesion Fund, Just Transition Fund).
Sequentiality	
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## Glossary

Cohesion Fund	The Cohesion Fund (CF) provides support to EU Member States with a gross national income per capita below 90% (EU-27 average) to strengthen the economic, social and territorial cohesion of the EU. It supports investments through dedicated national or regional programs. The CF mainly contributes to investments in the field of environment and trans-European networks in the area of transport infrastructure.
Cohesion Policy	Cohesion Policy of the EU, also referred as Regional Policy, aims at improving the economic well-being of regions in the EU, by reducing economic, social and territorial regional disparities, with emphasis on restructuring declining industrial areas and diversifying rural areas with declining agriculture. The policy, with more than one third of the EU's Budget is devoted towards making regions more competitive, by fostering economic growth and by creating new jobs. It has evolved from a tool to counterbalance the regional disparities inevitably emerging from the Single Market, and, subsequently, from the Monetary Union to the investment pillar of the EU. The Cohesion Policy incorporates strategic objectives of smart, sustainable and inclusive growth by investing in key areas such as: research and innovation, support for small and medium enterprises, the low-carbon economy, employment and mobility, better education, social inclusion and better public administration. The policy also has a role to play in wider challenges for the future, including digitalization, climate change and energy supply.
European Atomic Energy Community	The Treaty establishing the European Atomic Energy Community (EAEC) was established in 1957. Among the main aims of the EAEC are: promoting research and disseminating technical information, setting uniform safety standards to protect the public and industry workers, to facilitate research and to ensure civil nuclear materials are not diverted to other uses, particularly military.
European Economic Community	The European Economic Community (EEC) was created by the Treaty of Rome in 1957, aiming to foster economic integration among its member states. The Community's initial aim was to bring about economic integration, including a common market, and a customs union, among the six founding members of Belgium, France, Luxembourg, Italy, West Germany and Holland. It gained a common set of institutions along with the European Coal and Steel Community (ECSC) and the European Atomic Energy Community as one of the European Communities under the Merger Treaty of 1965. Upon the entry into force of the Maastricht Treaty in 1993, the EEC was renamed the European Community (EC) to reflect that it covered a wider range than economic policy. The EC existed in this form until it was abolished by the 2009 Treaty of Lisbon, which incorporated the EC's institutions into the EU's wider framework.

European Green Deal	The European Green Deal is a package of Policy initiatives, which aims to set the EU on the path to a green transition, with the goal of reaching climate neutrality by 2050. It supports the transformation of the EU into a fair and prosperous society with a modern and competitive economy.
European Regional Development Fund	The European Regional Development Fund (ERDF) aims to strengthen economic, social and territorial cohesion in the EU by correcting imbalances between its regions. In the 2021-2027 programming period, it enables investments in a smarter, greener, more connected and more social Europe that is closer to its citizens.
European Social Fund Plus	The European Social Fund Plus (ESF+) is the European Union's main instrument for investing in employment, social, education and skills policies, including structural reforms in these areas. The ESF+ brings together four funding instruments: the European Social Fund (ESF); the Fund for European Aid to the Most Deprived (FEAD); the Youth Employment Initiative; and the European Program for Employment and Social Innovation (EaSI). The ESF+ aims to strengthen Europe's social dimension, by putting the principles of the European Pillar of Social Rights into practice.
European Structural and Investment Funds	A lot of funding in the European Union is disbursed through the European Investment Funds. The funds allow investments to be made in employment, a sustainable and healthy European economy and the environment. The most important funds are the following four: the European Regional Development Fund, the Cohesion Fund, the European Social Fund Plus, and the Just Transition Fund.
European Unit of Account	The European Unit of Account (EUA) was a unit of account most notably used in the EEC from 1975 to 1979, when it was replaced at parity by the European Currency Unit, in turn replaced at parity in 1999 by the euro.
Ex-ante conditionalities	With the aim of enhancing the efficiency of the implemented investments the so-called ex-ante conditionalities were introduced as a new element of European Cohesion Policy 2014-2020. This is an essential mechanism in ensuring the adequate framework to optimise the use of available resources and also to support the transposition of Union law into national legislation. The ex-ante conditionality is the precondition for an efficient and effective attainment of the specific objective of the Union's investment priority and is directly related to the attainment of the relevant objective.
Interreg	Interreg Europe is an interregional cooperation program, co-funded by the EU, which strives to reduce disparities in the levels of development, growth and quality of life in and across Europe's regions. It helps local, regional and national governments across Europe to develop and deliver better policy. It also supports the exchange of good practices and policy learning among European regions in 29 countries - the EU27, Norway and Switzerland.



InvestEU	The InvestEU Program supports sustainable investment, innovation and job creation in Europe. The InvestEU Program builds on the successful model of the Investment Plan for Europe. It brings together, under one category, the European Fund for Strategic Investments and other EU financial instruments.
Just Transition Fund	The Just Transition Fund (JTF) is a brand-new fund created under the 2021-2027 programming round. The JTF's single specific objective is to support the regions and communities in Europe that are most negatively affected by the transition to climate neutrality, ensuring that no member state lagging behind the rest. In essence, the JTF aims to address employment, economic, social and environmental impacts that come with the shift away from carbon-intensive activities.
Just Transition Mechanism	The Just Transition Mechanism (JTM) is a key tool to ensure that the transition towards a climate-neutral economy happens in a fair way, leaving no member state lagging behind the rest. The JTM provides targeted support to help mobilize funds in the most affected regions, to alleviate the socio-economic impact of the transition.
NextGenerationEU	NextGenerationEU is an ambitious (temporary) recovery plan to support the economic recovery from the coronavirus pandemic. It includes five focal points: (1) greening (becoming climate-neutral), (2) digitalisation, (3) mental health and healthcare, (4) education, and (5) equality. Source: Directorate-General for Budget (2021).
Public Sector Loan Facility	It supports projects addressing social, environmental and economic challenges deriving from the transition to the Union's climate target objectives. The facility mobilizes additional investments with the support of the European Investment Bank (EIB). EIB loans (up to €10 billion) and EU grants (up to €1.5 billion) to help public sector entities in the most affected regions to meet their development needs in the transition towards a climate-neutral economy.
REACT- EU	The Recovery assistance for cohesion and the territories of Europe (REACT-EU) extends the crisis-response and crisis-repair measures delivered through the coronavirus response investment initiative (CRII) and the coronavirus response investment initiative plus (CRII+), and constitutes a bridge to the long-term recovery plan. The programme supports investment projects that foster crisis-repair capacities and contribute to a green, digital and resilient recovery of the economy, including support for maintaining jobs, short-time work schemes and support for the self-employed. It can also support job creation and youth employment measures, healthcare systems and the provision of working capital and investment support for small and medium-sized enterprises. REACT-EU is not a new funding source, but a top-up to 2014-2020 European Regional Development Fund and European Social Fund allocations. It sought to mobilize an additional €47.5 billion from the structural funds for the years 2021 and 2022, and to increase flexibility in cohesion policy spending. These can be used until end 2023, as was already the case for the original allocations.

Trans-European Transport Networks	The EU's trans-European transport network policy, TEN-T policy, is a key instrument for the development of coherent, efficient, multimodal, and high-quality transport infrastructure across the EU. It comprises railways, inland waterways, short maritime shipping routes and roads linking urban nodes, maritime and inland ports, airports and terminals.
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## Acronyms

CF	Cohesion Fund
EAEC	European Atomic Energy Community
EEC	European Economic Community
ERDF	The European Regional Development Fund
ESF+	The European Social Fund Plus
ESIF	European Structural and Investment Funds
EU	European Union
JTF	Just Transition Fund
JTM	Just Transition Mechanism
REACT EU	Recovery assistance for cohesion and the territories of Europe
TEN-T	Trans-European Transport Networks

## About this module

Welcome to Module 4 of the COPE MOOC!



Figure 43: About this module

Although this module can be studied independently, its primary purpose is to equip students with the required knowledge to tackle the upcoming modules.

Despite that, this module 4 examines a very important policy of the European Union. It conveys fundamental knowledge to journalism students about the EU's Cohesion Policy, its history, nature, development and purpose.

This Module will often refer to additional content from EU websites. Although these websites often do not contain criticism towards the EU, you will find accurate information regarding EU Cohesion Policy.

## Introduction to the story of this module

Imagine that you are a journalist working for a medium in one of the countries which is a member of the EU and you are interested in investigating EU Cohesion Policy, highlighting both the advantages and shortcomings of the several billion Euros that have been allocated to the countries of your area to mitigate regional disparities and as a tool to boost economic growth and development.



Figure 44: Introduction to the story of this module

But to do so, you need to learn about what EU Cohesion Policy is and how it's being implemented. You hear a lot about European Structural Funds and the Resilience and Recovery Facility, but have no idea of how Cohesion Policy works. This module will help you to have a better grasp of EU Cohesion Policy and provide you the most useful information in a nutshell!

To begin with, Cohesion Policy is a development policy aimed at improving the conditions for sustainable growth and jobs, well-being, and quality of the environment in the EU regions and at strengthening the integration of regional economies.

This overall objective is served mainly by promoting investments in human, physical and social capital which help mobilizing resources in regions where they are underutilized, improving regions' capacity to adjust to a constantly changing environment, encouraging an innovative business environment, and supporting cooperation and exchanges (Bachtler et al. 2017, Cerniglia & Saracano 2021).

## Exercise 1:

Please look at the following [link](#) which offers a selection of visualizations accompanied by short texts that make it possible for you to get a deeper understanding of the social, economic and environmental situation across the 242 European regions.

In doing so, please:

1. Have a look at the map to see the borders and names of the European regions.
2. Scroll down and play around with the visualizations and select information for specific regions, for example where you live, study or work.

Use a maximum of 30 minutes on this.

## The Origins

First, let's have a look at how it started and developed.

Well, in the 1950s, the Preamble of the Rome Treaty that established the EEC, declared that the signatory states were anxious to foster harmonious development of economic activities. However, it did not create a proper European Cohesion policy.

Only three instruments addressing regional imbalances were included in the Rome Treaty. The first was the European Investment Bank (EIB). The second was the European Social Fund (ESF). The third was the Guidance section of the European Agricultural Guidance and Guarantee Fund.

At the beginning of the 1970s, EU Cohesion Policy definitively made it into the EEC policy agenda for two reasons: (a) the oil crisis of the 1970s, which underlined the need for coordinated actions to cope with regional disparities in Europe; (b) the accession of Denmark, the UK and Ireland in 1973 which exacerbated regional disparities.



Figure 45: The Origins

In July 1973, the European Commission drafted a legislative proposal concerning the creation of the European Regional Development Fund (ERDF). This was approved in December 1974 by the EEC leaders, which was formally established in March 1975. Initially, the ERDF achieved only modest results as its budget of 1.3 billion EUA (European Units of Account) (around 5 per cent of the Community budget) was too small to play a significant role.

## Exercise 2:

Please read [this article](#) on the history and legal foundations, objectives, thematic concentration, and financial rules of Cohesion Policy.

Use a maximum of 20 minutes on this.

## The Development

As a journalist working on EU Cohesion Policy, you also need to be aware of the major turning points that facilitated its growth and significance.

One such turning point was the [Single European Act](#) (SEA), in 1986, which made EU Cohesion Policy a community competence and social and economic cohesion a community goal.



Figure 46: The Development

The EEC of the late 1970's and early to mid 1980's was plagued by high unemployment and economic stagnation particularly when compared with the United States and Japan. The SEA effectively sought to prepare Europe for a new round of integration to be completed by the early 1990s. The idea of the SEA was to highlight and develop the means for Europe to complete its internal market. The SEA created the necessary decision-making structures (such as increasing qualified majority voting and reducing voting under anonymity) that would allow progress towards complete market unification to be made and ensure that continuing management of the single market could be carried out once unification had been completed.

Art. 130a of the SEA underlined that the EEC should pursue actions leading to the strengthening of its economic and social cohesion. The Community, it was also stressed, should aim at reducing disparities between the levels of development of the various regions and the backwardness of the least-favored regions. Art. 130b SEA established that the achievement of these objectives should be supported through the Structural Funds, the EIB and the other existing financial instruments.

Following that, the Delors package of 1987–1988 (named after the President of the Commission 1985-1995), €63 billion was allocated to this policy for the period 1989–1993, accounting for a growing share of the total Community budget: from 18% in 1987 to 29% in 1993.

Moreover, the fundamental principle underpinning the EU Cohesion Policy was set out: focusing on the poorest and most backward regions, multi-annual programming, strategic orientation of investments and involvement of regional and local partners.



### Exercise 3:

Click on the (links [1](#), [2](#), [3](#)) and also search the internet to read about the SEA, and take notes and answer the following?

1. What led to the development of the SEA?
2. What changes did the SEA bring about in the EU Cohesion Policy?

You can find the solution to this exercise at the very end of this module.

### The Birth

In researching the history and development of EU Cohesion Policy you will come across the period of 1988-1993, which marked the birth of a fully-fledged EU Cohesion Policy. Structural Funds assumed an even more important role and with the Treaty of Maastricht two novelties were introduced:

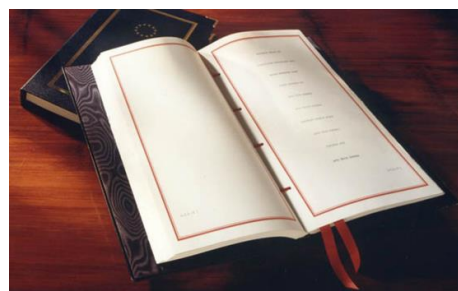


Figure 47: The Birth

1. The Cohesion Fund, set up with the aim of assisting the poorest EU Member States whose gross national income per capita totalled less than 90 % of the EU average. Cohesion Fund resources were allocated to infrastructural measures in the field of transport and environment.
2. The [Committee of the Regions](#), an assembly of local and regional representatives that provides sub-national authorities (for instance, regions, counties, provinces, municipalities and cities) with a direct voice within the EU's institutional framework.

### The Consolidation

The EU Cohesion Policy has come a long way from the initial reluctant steps to initiatives and policies that have transformed it into a genuine regional development tool.



Figure 48: The Consolidation

On this page and on the following pages, as a young and aspiring journalist you will learn and investigate how the EU Cohesion Policy has been consolidated and expanded to meet the needs of an enlarged Union and wider EU goals that have risen from global developments, such as the debt crisis, the coronavirus pandemic and climate change.

Let us begin, by noting that in 2004, 2007 and 2013, thirteen States joined the EU (Cyprus, Estonia, Latvia, Lithuania, Malta, Poland, Czech Republic, Slovakia, Slovenia, Hungary, Romania, Bulgaria, Croatia). With the accession of these countries, the regional disparities within the Union become considerably more intense. Thus, this period was characterized by the need to match an enlarged Union and wider EU goals (Baun & Marek 2008).

As a result, a fundamental aspect of the EU Cohesion Policy for 2007–2013 was the strong reduction of aid for the old member states of the EU. More than half of the €308 bn was allocated to the new Member States.

As of 2007, three new objectives defined Cohesion policy: Convergence, Regional Competitiveness and Territorial Cooperation. These new objectives had multiple goals aimed to stimulate growth, competitiveness and employment in the least-developed regions. The Cohesion Policy now supports cross-border cooperation through joint initiatives by local and regional authorities, and promotes common solutions in domains such as urban, rural and coastal development, and the setting up of small and medium-sized enterprises.

Please click on the links [1](#), [2](#) and [3](#) and investigate how the above-mentioned objectives are facilitated and implemented through the programmes interAct, Urbact and ESPON. You should pay attention to their thematic priorities, the exchange of experience, information, and innovation, in order to promote best practice and make cooperation on EU Cohesion Policy easier.

## The Innovations

We now turn to the innovations introduced to the EU Cohesion Policy in the period 2014-2020.

Although in many respects they resembled that of the previous periods, significant regional allocation criteria were introduced. There is still the category of less developed regions, which correspond as in the past to those with a per capita income in terms of purchasing power below the 75 % of the Community average and to which the greatest part of the resources was earmarked.

The innovation is represented by the category of “transition” regions (per capita income between 75% and 90 % of the EU average) and by the category of the most developed regions (per capita income above 90% of the EU average). In addition, the geography of the beneficiaries shifted ever farther eastwards to the new Member States which absorb about 55% of the total resources.



Figure 49: The Innovations

Moreover, new conditionality measures were introduced to reinforce the results-orientation emphasis. An ex-ante conditionality was set up, introducing several framework conditions which must be in place before the funds are disbursed to ensure that investments can be made in the most effective manner and that the selected thematic objectives and investment priorities are properly implemented.

Also, progress towards the achievement of these objectives is now closely monitored and measured against a set of milestones agreed as part of a performance framework. Finally, each member state must negotiate with the Commission a new Partnership Agreement, which outlines the country’s strategy and proposes a list of programmes.



This created the premises of European Structural and Investment Funds (ESIF), with emphasis on the following 11 objectives:

1. strengthening research
2. technological development and innovation
3. enhancing access to, and use and quality of, information and communication technologies
4. supporting the shift towards a low-carbon economy
5. promoting climate change adaptation
6. risk prevention and management
7. sustainable transport and improving network infrastructures
8. sustainable and quality employment and mobility
9. social inclusion
10. combating poverty and any discrimination
11. improving the efficiency of public administration.

Now search the websites of the EU, beginning with the [website of the ESIF](#). Locate the five funds of the ESIF and understand how do they support the EU Cohesion Policy, how are they managed, what are the core investment areas of the ESIF and who are the main beneficiaries of the ESIF? This will help you with Exercise 1 of this module.

## Overview

We have now completed our discussion of the history of EU Cohesion Policy from 1957 to 2020.

Now look at the YouTube video ([Euractiv.com](#)) and the article ([Brunazzo 2016, links](#)) to refresh your memory on the main turning points of the EU Cohesion Policy in the period 1957-2020, and how it became a significant investment policy of the EU.



Figure 50: Overview

## What's New?

Since the outbreak of the COVID-19 pandemic in Europe, the EU Cohesion Policy has been at the forefront of the European response to the crisis, contributing to the economic recovery of the EU. According to the EU Cohesion Policy Regulation for 2021-2027 programming period, which entered into force on 1 July 2021, the main objectives are:

1. To increase the focus of EU Cohesion Policy on a 'smarter' and 'greener' Europe
2. To reinforce support for the preparedness of health systems
3. To enhance crisis-response mechanisms for future crises
4. To allow for temporary measures for the use of the funds in response to exceptional and unusual circumstances
5. To allow for greater flexibility and synergies between all EU instruments, member states and local societies

In order to reach these goals and address the diverse development needs in all the EU's regions, €392 billion – almost a third of the total EU budget has been set aside for the EU Cohesion Policy for 2021-2027. Almost €10 billion is also shared between almost 100 Interreg programmes. Interreg is one of the key instruments of the EU supporting cooperation across borders through project funding. Its aim is to jointly tackle common challenges and find shared solutions in fields such as health, environment, research, education, transport, sustainable energy and more.

As a journalist, you should know the above-mentioned objectives are to be facilitated by the European Regional Development Fund (ERDF), the European Social Fund Plus (ESF+), the Cohesion Fund (CF), in complementarity with newly created instruments, which are as follows:

1. The Recovery and Resilience Facility.
2. The Recovery assistance for cohesion and the territories of Europe (REACT-EU).
3. The Just Transition Fund



Figure 51: What's New?

Now, please watch these videos of [EURACTIV](#) and [EUinmyRegion](#), which demonstrate how these new instruments are designed to contribute to EU Cohesion Policy after the coronavirus pandemic. These videos also serve as an introduction to the topic that will be discussed on the upcoming pages.

## Funding Allocations and Management

Having watched the videos and understood the background behind the design of the post-Covid EU Cohesion Policy, it is now important as a journalist to examine in greater detail the priorities, structures and the procedures regarding the management and allocation of the €392 billion that has been set aside for the EU Cohesion Policy for the period 2021-2027.



Figure 52: Funding and Management Allocations

To do so, you need to know which instruments and funds are central to the process, and in what ways the allocations of the investments and thematic priorities are planned.

Please note:

1. The ERDF aims to strengthen economic, territorial and social cohesion in the European Union by correcting development imbalances between its regions. ERDF investments also focus on digitalization of services for businesses and citizens, and the rollout of the high-speed broadband.
2. The Cohesion Fund targets the reduction of economic and social disparities through investment in the environment and the Trans-European Transport Networks (TEN-T), energy efficiency, using renewable energy.
3. The ESF+ assists member states use the money to create and protect job opportunities, promote social inclusion, fight poverty, by combatting homelessness, and give workers the skills needed for the digital and green transition. It also works on an ambitious requirement to invest in young people and addressing child poverty.
4. The JTF is a new EU Cohesion policy fund and it is a key element of the European Green Deal. It is the first pillar of the Just Transition Mechanism, which aims to alleviate, in the most impacted regions and industries, the socio-economic costs resulting from the transition towards a climate-neutral economy.

Note as well:

1. The ERDF and CF funds will invest €274 billion in the EU's regions (respectively, €226 billion ERDF and €48 billion CF).
2. Thanks notably to thematic concentration, at least 30% of the ERDF allocation and 37% of the CF allocation will be devoted to achieving climate targets, with an overarching objective to support transition to a climate neutral economy.
3. The ESF+ has a budget of €99.3 billion, which includes €98.5 billion under shared management with the member states, and €762 million for the employment and social innovation strand under direct management by the Commission.
4. The JTF has an overall budget of €19.2 billion, with €8.4 billion coming from the Multiannual Financial Framework (MFF) and €10.8 billion from NextGenerationEU.

#### **Exercise 4:**

Bearing the four points above in mind, read about EU allocations available for funding; [ERDF](#); [ESF](#); and [JTF](#) and answer the following questions on EU Cohesion Policy 2021-2027:

1. What is new for the EU Cohesion policy?
2. Which investments will the ERDF and CF cover?
3. How will the ERDF and CF support be making the EU climate neutral by 2050?
4. What is new about the European Social Fund Plus Regulation?
5. What is new about the Just Transition Fund?

Use a maximum of 60 minutes to work on this. The solution to this exercise can be found at the very end of this module.

### **Stages of policy implementation**

EU Cohesion Policy is implemented by national and regional bodies in partnership with the European Commission, for a period of 7 years. The policy Implementation of the policy follows these stages:

- The budget for the policy and the rules for its use are jointly decided by the European Council and the European Parliament on the basis of a proposal from the Commission.
- The Common provision regulation establishes the regulatory framework common to EU funds under shared management.
- The principles and priorities of cohesion policy are distilled through a process of consultation between the Commission and the EU countries.
- Each Member State produces a draft Partnership Agreement, which outlines the country's strategy and proposes a list of programmes.
- In addition to this Member States also present draft programmes which cover entire Member States and or regions. There will also be cooperation programmes involving more than one country.
- The Commission negotiates with the national authorities on the final content of the Partnership Agreement, as well as each programme. The programmes present the priorities of the country and/or regions or the cooperation area concerned. Workers, employers and civil society bodies can all participate in the programming and management of the Programmes.
- The programmes are implemented by the Member States and their regions. This means selecting, monitoring and evaluating hundreds of thousands of projects. This work is organised by 'managing authorities' in each country and/or region.
- The Commission commits the funds (to allow the countries to start spending on their programmes).



*Figure 53: Stages of policy implementation*

- The Commission pays the certified expenditure to each country.
- The Commission monitors each programme, alongside the country concerned.
- Both the Commission and the Member States are responsible for reporting and evaluating throughout the programming period.

## Transparency and Data

As a journalist working on the EU Cohesion Policy, you will come across many doubts regarding the value (see Module 8 Title 3) and management (see module 9 Title 3) of the investments that will be made by the EU's Cohesion Policy.

1. Does the EU Cohesion Policy have an added value?
2. Are the projects that are funded useless?
3. Do only less developed countries benefit from the Cohesion Policy?
4. Are the funds and investments all about fraud?
5. Is EU money mismanaged?
6. Does the EU Cohesion Policy funding cause job losses in richer member states by supporting companies' relocation to poorer countries?



Figure 54: Transparency and Data

It is therefore important that you have access to data on the funds of the EU Cohesion Policy, which not only you understand, but also critically analyze. In that direction, since 2015 the European Commission has started publishing open data on the use of ESIF for the 2014-2020 period in the 28 Member States (27 after Brexit), data which can be consulted and downloaded. From September 2022 the data of the 2021-2027 programming period have also been activated.

This is a major initiative in terms of the availability of data and information on the EU's Cohesion Policy and meets the growing need for policy transparency and accountability.

With that in mind, please listen to the [DG REGIO video](#) on the Cohesion Open Data Platform of the European Commission.

Then, visit the [Cohesion Open Date Platform](#) of the European Commission and in particular the [Cohesion Overview 2021-2027 platform](#). This platform visualizes and provides open data on hundreds of national, regional and interregional programmes funded by the EU Budget.



### Exercise 5:

Explore the data available and write a journalistic report, maximum 700 words for your audience/readers, on how to search for information on investment plans and achievement targets from adopted programmes.

Tips for writing the report:

1. Begin by writing about the data provided on EU funds, thematic priorities, programmes and projects and why this is important.
2. After that, write about how they can look not only for data provided on the EU Cohesion Policy, but also how to examine the interactive stories (that combine a narrative text with insights and analysis of open data on the platform) on the projects and funds in their region and country.

### Does the EU Cohesion Policy Work?

As noted above, one of the most pressing questions regarding your research and reports on the EU Cohesion Policy will be the following:

Can we justify it and on what grounds?

You need to be able to investigate and answer this question: the myths and facts of the EU Cohesion Policy. To do so it is important that you follow the research that is generated by the complexity and diversity of EU Cohesion Policy.



Figure 55: Does Cohesion Policy Work?

At this point, it would be wise to search the internet and try to develop a list of leading research centers, networks, think tanks, evaluators and academics on the issue. This will prove to be very useful in the future for your investigative research.

Having said that, let's discuss how the EU justifies EU Cohesion Policy.

The findings of a Commission Staff Report (written in 2016) of EU Investments found that the Cohesion Policy had substantial and tangible results. These range from job creation, new products launched on the market, positive impact on reducing regional disparities and an increase in Gross Domestic Product (GDP).

Read [the evaluation](#).

The conclusions of the 8th Cohesion Report (see Module 8) published by the Commission in 2022 were similar. However, and although it is not the purpose of this module to review the performance of the EU Cohesion Policy, it is important to stress that the results of the report show a very mixed picture.

However, and while there has been positive progress with convergence between less-developed regions and the EU average, the report also underlines that:

1. Some middle-income and less developed regions have declined, especially in southern EU Member States
2. Regional disparities in key labor market indicators are still higher than before 2008, indicating the long shadow of the 2008–10 financial and economic crisis
3. There has been mixed progress in reducing disparities in some of the key growth factors (for example, innovation, entrepreneurship)

European regions, according to a [report published by Bertelsmann-Stiftung in 2022](#) show substantial disparities in economic prosperity. The spread in purchasing power adjusted GDP per capita (2019) ranges from slightly over €10,000 in some Bulgarian regions to more than €78,000 in Luxembourg. This means that, while in some Bulgarian regions economic output is only 28 percent of that of the EU-27 average (€29,900 in purchasing power standards per capita), in Luxembourg it is at 254 per cent, and well above the EU average.

Furthermore, research conducted by researchers from the University of Mannheim, the Jacques Delors Centre in Berlin and [Aarhus University in 2023](#) conclude that the Cohesion Policy fails to reach the most “left-behind people” and increases inequality within European regions. In particular, the study found that the Cohesion Policy helps to increase labor income for the highly educated and richest income groups in eligible regions, while effects on poorer households are close to zero. As a result, high-skilled workers—often in better-paid positions and generally more affluent—benefit more from cohesion funds than low-skilled workers and poorer households.

In addition, a recent [Eurobarometer study](#) laid bare issues ranging from the cost-of-living crisis (where 92% of those surveyed expressed worry) and fears about poverty and social inclusion (with 82% expressing worry).

## **Conclusion**

As you now know the EU Cohesion Policy of the EU has a long history.

You learned a lot about what the Cohesion Policy of the EU is, why it was created and what purpose it has served. It all started when the EEC was created in 1957 and has grown to become the EU's main investment policy and tool. Many funds and programmes shape the functioning, allocation and management of the EU Cohesion Policy.

In completing the module, however, you should also make an effort afterwards to read and investigate on the many challenges that the EU Cohesion Policy is facing today, which are likely to determine what purpose the Policy hopes to serve in the future. This is especially so, when considering the problems the EU will face over the coming years, the most dramatic are those related to the consequences of the pandemic, the energy and climate crises, and the war in Ukraine and the Middle-East.

As the EU's external environment becomes more hostile, this will impact on the quality and effectiveness of internal EU policies (such as healthcare, society, education and innovation investments).

As a journalist you need to be aware of the importance of this external-internal dynamic in the EU's policy design and development process. If not, the EU's solidarity and strategic coordination will be tested, especially when considering the conflicting views across many policy domains, on how to



both deal with the energy crisis and to navigate a changing security pathway as well as manage new global trading developments.

These challenges will influence the debate on how Cohesion Policy should change the purpose of the Policy, the need to reassess the principles of the policy and the relationship between the Cohesion Policy and other EU policies and priorities that have arisen regarding the EU, such as resilience security, strategic autonomy and institutional reforms (Hunter 2023)

All the above provide you, as a journalist, not only the means to do investigative research and reporting on the EU Cohesion Policy, but also an insight into its current and future challenges.

### **Sources and literature and contact information**

The sources mentioned in the module, as well as the literature recommended for further reading are:

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Below you can find the contact information of both authors of this Module:

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## Solutions for Module 4:

### Exercise

3:

Question 1. The EU of the late 1970's and early to mid 1980's was plagued by Euro-sclerose, high unemployment and economic stagnation particularly when compared with the United States and Japan. The SEA effectively sought to prepare Europe for a new round of integration to be completed by the early 1990s. The idea of the SEA was to highlight and develop the means for Europe to complete its internal market. The SEA created the necessary decision-making structures (such as increasing qualified majority voting and reducing voting under anonymity) that would allow progress towards complete market unification to be made and ensure that continuing management of the single market could be carried out once unification had been completed.

Question 2. Art. 130a underlined that the EEC should pursue actions leading to the strengthening of its economic and social cohesion. The Community, it was also stressed, should aim at reducing disparities between the levels of development of the various regions and the backwardness of the least-favored regions. Art. 130b SEA established that the achievement of these objectives should be supported through the Structural Funds, the EIB and the other existing financial instruments.

### Exercise 4:

This is a short overview of the answers to the questions:

Question 1. The focus remains the same but reinforces support for the preparedness of health systems and measures addressing youth unemployment and child poverty. Member States have additional flexibility to transfer resources among the funds and there is a fully-fledged crisis-response mechanism for future crises.

Question 2. The ERDF focuses its investments on several key priority areas, innovation and research, the digital agenda, support for the small and medium-sized enterprises environment and the net-zero-carbon economy. The Cohesion Fund supports environmental infrastructure and priority EU projects in transport, projects of energy efficiency, use of renewable energy and sustainable urban mobility.

Question 3. A significant portion of ERDF and CF allocation will be devoted to achieving climate targets. In this context, the funds will focus on supporting a low carbon Europe by promoting clean and fair energy transition. This means supporting energy efficiency and renewable energy, diversification of regions dependent on energy intensive industries and providing incentives for delivering a transition that is fair for all.

Question 4. The ESF+ is the result of combining the existing European Social Fund (ESF), the Youth Employment Initiative (YEI), the Fund for European Aid to the Most Deprived (FEAD) and the Employment and Social Innovation Programme (EaSI). The new ESF+ includes a dedicated article on the link between the ESF+ and the Charter of Fundamental Rights. There are also changes regarding increased flexibility over the seven-year period.

Question 5. The JTF is a key element of the European Green Deal and focusses on a wide range of activities aiming mainly at diversifying the economy and helping people adapting in a changing labor market. The JTF will primarily provide grants to regions with a high number of people working in coal, lignite, oil shale and peat production or to regions that host greenhouse gas-intensive industries. The JTF will for example support workers to develop new skills and competences for the job market, SMEs, microenterprises and start-ups, creating new economic opportunities to create jobs in these regions.

# Module 5: Cohesion – Concept in Political Science and its Relevance for Societies Within the EU

## Basic Information

Module number	5
Module title	Cohesion: concept in political science and its relevance for societies within the EU
Duration/study load	8 hours
Keywords	European Union (EU); Cohesion; Political science; Upward convergence; Social cohesion Economic cohesion; Territorial cohesion; Political cohesion; Europeanisation; NUTS classification
Learning outcomes	<p>At the end of the module, students should...</p> <p>be able to reproduce general knowledge (and elements of specialised knowledge) in a field of EU matters, especially in context of social and political cohesion</p> <p>be able to identify multiple perspectives on an issue, coming from different actors</p> <p>be able to distinguish between main and side issues concerning EU activities</p> <p>be able to interpret the selected information in a field of EU matters</p>
Description	<p>Module 5 will address cohesion as a concept in political science and transfer it to the EU. It will be discussed why cohesion is now even more relevant for both societies and states within the EU. To shed light on the issue, concrete case studies for cohesion policies from across the EU will be reflected. All this with the aim of motivating you to critically reflect on existing interpretations and approaches, strengths, and weaknesses of the concept of cohesion in the social, economic and political sphere of the EU. Provided examples will mostly refer to EU Cohesion Policy, but we will also discuss fields in which EU member states still lack cohesion, for example foreign and security policy. Since cohesion is also related to questions of identity, we will also try to find out "What is Europe, and what is in it for me?".</p>
Sequentiality	<p>Module 5 is intertwined with Module 4. The module will also serve as a "bridge" between Modules 2 &amp; 3 and Module 6, as it introduces best practice cases of coverage on these key policy fields, and explains how journalistic coverage may have an impact and made a difference for EU and local policy-makers and stakeholders: citizens, local authorities, businesses or local NGOs.</p>

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## Glossary

<b>Cohesion</b>	<p>Togetherness of a community, or the sense in which members identify and behave as a [...] unitary group.</p> <p>Source: Gerring, Veenendaal (2020)</p>
<b>European Union (EU)</b>	<p>The European Union is a supranational political and economic entity (Deschouwer &amp; Hooghe, 2015), which operates in some ways as an intergovernmental organisation (McCormick, 2014).</p> <p>Source: <u>CES Carleton (2023)</u></p>
<b>Political science</b>	<p>The systematic study of governance by the application of empirical and generally scientific methods of analysis.</p> <p>Source: <u>Britannica (2023)</u></p>
<b>Social cohesion</b>	<p>Social cohesion focuses on “values and identity [as] the basis for the stability of a just society” (Castiglione, 2019) and intends to explore “willing cooperation across many types of social interactions” (Aall/Crocker, 2019). Thus, it is about what holds a society together at its core.</p> <p>Source: <u>Aall, Crocker (2019)</u></p>
<b>Territorial cohesion</b>	<p>Territorial cohesion is promoting balanced and harmonious territorial development between and within countries, regions, cities and municipalities, as well as ensuring a future for all places and people in Europe, building on the diversity of places and subsidiarity.</p> <p>Source: <u>European Union (2023)</u></p>

## Acronyms

EU	European Union
MOOC	Massive Open Online Course
NUTS	Nomenclature des unités territoriales statistiques / Nomenclature of territorial units for statistics



## About this module

Welcome to Module 5 of the COPE MOOC!

Cohesion seems to be now even more normatively relevant for both societies and states within the EU than in the past. Problems related to the economic impact of the COVID-19 pandemic, the ongoing energy transition and the prospects of the adverse effects of climate change showing themselves more and more clearly are just some of the many challenges in this area. Added to this is the changing international economic environment, with consequences such as Russia's aggression against Ukraine and China's growing power, also expressed in economic expansion on the European continent.

All of this presents the EU with a number of challenges. Some of these are already familiar from the past, but others (such as the effects of climate change) are new challenges that require thinking in entirely new terms. The most important of these, relating to the period 2014-2024, can be found in the timeline below. Consider if you yourself would add any more events of this type to this list?



Figure 56: Timeline - Political, economic and social challenges for the European Union 2014-2024; Source: Own Production with Padlet

A proper understanding of these phenomena requires knowledge of the concept of cohesion itself, and this is proving to be not as obvious as it might seem.

Therefore, the first part of the module deals with the analysis of the existing models and concepts of cohesion and their application in the analysis of individual phenomena occurring both at the level of individual societies and at the international level.

The second part of the module will confront these models with concrete processes taking place both inside the EU, on political and societal levels and in its wider (Euro-Atlantic and global) environment. The processes within the EU would for example involve the shaping of the common European identity, including the role of the Charter of Fundamental Rights and perception of the EU among its citizens. [MD1] We will analyse cases of EU Cohesion Policy from across the EU, and from key policy fields for the Union.

All this with the aim of motivating you to critically reflect on existing cohesion approaches and how cohesion concepts can be further developed in their implementation. Finally, you will be given the opportunity to exchange and discuss your own understandings of cohesion and European identity.

While this module can be studied independently, its primary purpose is to equip you with the additional contextual information which will help you find your way even better in subsequent modules, especially Module 6 (EU & the role of media).

This module will continue the threads from Module 2 (history and institutions of the EU), Module 3 (governance and policy areas, budget, EU law and current affairs influencing the EU's functioning) and Module 4 (EU Cohesion Policy). The current module will address cohesion as a concept in political science, also analysing the various concepts in practice - with particular reference to the

realities of the European Union—not only as an international organisation, but also as a geopolitical actor on a global scale. That's also why we highly recommend that you look at Modules 2, 3 and 4 before delving into Module 5.

The purpose of all this is to show you to what extent the EU Cohesion Policy is rooted in certain normative assumptions, i.e. with regard to "European values", and to what specific extent these affect the functioning of the Union. It should help you to understand the wider current context of the EU institutions' activities.

### **Introduction to the story of this module**

Let's meet Michael! You might have met him in the previous modules, but if you haven't here is a short introduction. Michael was born in New York (USA). He is now 21 and after finishing his bachelor's degree in international relations he wants to continue his studies in Brussels. His master's thesis will be related to the Cohesion Policy of the European Union so he has a lot to learn about the many aspects of cohesion in the EU. In this module, you may join Michael in his journey through the fascinating world of cohesion concepts, interpretation and practical consequences. Maybe it will be easier for you if you learn together!

### **Cohesion as a concept in political science**

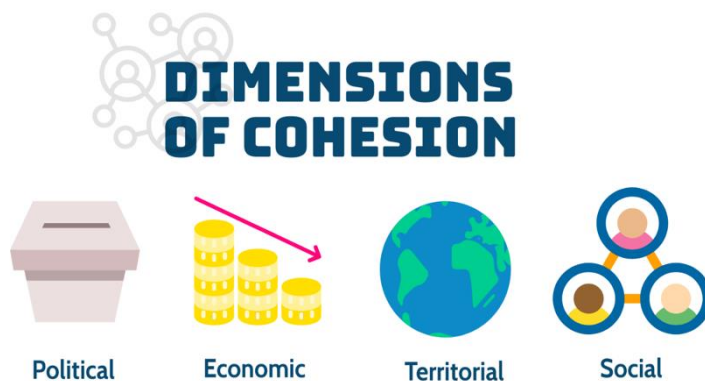
The concept of cohesion appears in various contexts in the social sciences. Broad definitions identify cohesion as e.g. "togetherness of a community, or the sense in which members identify and behave as a [...] unitary group" (Gerring & Veenendaal, 2020). As a result, traditional academic debate on cohesion is mostly a debate on **social cohesion** which discusses "values and identity [as] the basis for the stability of a just society" (Castiglione, 2019) or to explore "willing cooperation across many types of social interactions" (Aall & Crocker 2019).

Considering the cohesion debate in the field of political science, two major problems can be identified. Firstly, there have been only initial steps in political science to explore cohesion aspects beyond individuals and groups with their values, norms and identities. Secondly, the term "**political cohesion**" hardly appears in the research literature – and even in those rare cases it is not applied systematically. Political cohesion is described as e.g. "the commitment to a common political project" (Bonotti, 2019) or it "focalizes on group identities and on emotions as catalysts for group-based political action" (de Cuzzani, 2019).

That's why it's important to broaden the scope of (social) cohesion beyond individuals/groups and their norms/identities and to introduce a clearer focus. To do so, we could consider using the term "political cohesion" when it comes to cohesion-effects of organisations (defined as entities with a specific purpose) and regimes (defined as commonly agreed procedures, rules, patterns of behaviour between states and international organisations). [MD1] It may help to identify and analyse broader cohesion effects at an international level. This would involve international organisations (like the EU, UN or NATO) and regimes. The latter would concern the human rights regime, an important element of the post-World War II international order, which was manifested in the emergence of international documents and agreements.

- [Universal Declaration of Human Rights](#) (1948),
- [Convention for the Protection of Human Rights and Fundamental Freedoms](#) (1950)
- [International Covenant on Civil and Political Rights](#) (1966),
- [International Covenant on Economic, Social and Cultural Rights](#) (1966),
- [The Charter of Fundamental Rights of the European Union](#) (2000).

## Dimensions of cohesion



In practice, therefore, we can distinguish four main dimensions of cohesion: social, economic, territorial and political. Try to find definitions of these four dimensions of cohesion using an internet search engine. Use a maximum of 15 minutes to work on this exercise. Compare the answers you find with the information in the next section of the text.

Figure 57: Four dimensions of cohesion; Source: Own production

- **Social cohesion** refers to the capacity of society to ensure the long-term well-being of all its members, including equal access to resources, respect for human dignity and diversity, personal and collective autonomy and responsible participation.
- **Economic cohesion** is related to the level of socio-economic development of an area, which results from the state and structure of the economy, the level of development of economic infrastructure, the asset situation of economic agents and their environment, and innovation and productivity. The increase or decrease in intra-regional differentiation within these aspects of socio-economic development is interpreted as changes in the level of economic cohesion.
- **Territorial cohesion** refers to a network of interconnections between many aspects of contemporary living space (economic, transport, environmental, developmental, social and other cohesion). It is expressed through minimising the occurrence of spatial conflicts (situation when two mutually exclusive or counter-productive forms of space use or development cannot be implemented at the same time or within a specific space) and balancing the differences in development potentials between regions, as well as the negative effects of development processes (resulting both from the individual characteristics of individual regions and the specificity of global markets).

- **Political cohesion**, as mentioned in a previous part of this chapter focuses on cohesion-effects of organisations and regimes. A key dimension of it is therefore the current degree of development of these organisations and regimes and predictions about their future (development, disintegration, evolution or replacement by other organisations and regimes).

In the video below, Professor Christoph Schuck of TU Dortmund University explains aspects of different dimensions of cohesion.

**Watch now** – [“How should we understand the concept of cohesion?”](#)



*Figure 58: Video - How should we understand the concept of cohesion?; Source: COPE production*

## Dimensions of cohesion in the EU



Figure 59: A plaque with information about a project supported by EU funds, Source: Own production

All these four dimensions of cohesion are present (albeit to varying degrees) in the EU's activities.

Economic and social cohesion became a competence of the European Community with the Single European Act of 1986. In 2008, the Treaty of Lisbon (see Module 2) introduced a third dimension of EU cohesion: territorial cohesion. However, we will undoubtedly also find elements of political cohesion in the EU's activities, although this is not formalised in the Treaties.

For the 2021–2027 period, the EU Cohesion Policy is based on **the eight EU funds**. Try to find the list of these funds using an internet search engine. Use a maximum of 15 minutes to work on this exercise. Compare the answers you find with the information in the next section of the text.

- European Regional Development Fund (ERDF),
- Cohesion Fund (CF),
- European Social Fund Plus (ESF+),
- Just Transition Fund (JTF),
- European Maritime, Fisheries and Aquaculture Fund (EMFAF),
- Asylum and Migration Fund (AMIF),
- Internal Security Fund (ISF),
- Border Management and Visa Instrument (BMVI).

The **five EU Cohesion Policy objectives for 2021–2027** are defined as:

- A smarter Europe — innovative and smart economic transformation;
- A greener, low-carbon Europe;
- A more connected Europe — mobility and regional ICT connectivity;
- A more social Europe — implementing the European Pillar of Social Rights;
- A Europe closer to citizens — sustainable and integrated development of urban, rural and coastal areas through local initiatives.

In 2021–2027 EU funds allocated to EU Cohesion Policy amount to €392 billion. The detailed allocations can be found [here](#), but you can also check detailed information in Module 4 of our MOOC.

## Social cohesion

Social cohesion is one of the traditional priorities for EU action, because it became a competence of the European Community with the Single European Act of 1986. Examples of this include strategic EU documents like "Europe 2020", with high levels of employment, productivity and social cohesion as three main priorities.



Figure 60: Social cohesion; Source: Own graphic with images from Pixabay

Shaping common European identity and maintaining stable support of citizens of the Member States for the EU requires high levels of social cohesion within the Union.



Figure 61: Social Cohesion; Source: Pixabay

Unfortunately, the last decade or so has brought some problems in this area. The financial crisis initiated in 2007-2008 and its long-term effects on many EU countries have contributed to the problem. This was compounded by longer-term trends including growing inequality, immigration and increasing cultural diversity (Eurofund, 2014).

While discussing social cohesion it is worth mentioning the role as well as the importance of **the European Social Fund+ (ESF+)**. The main aim of the ESF+ is to create a fair and socially inclusive society in EU member states. Defined as the EU's main instrument for investing in people with a budget of almost EUR 99.3 billion for the period 2021-2027, the ESF+ provides an important contribution to the EU's employment, social, education and skills policies, including structural reforms in these areas.

## Economic cohesion

A key concept in EU Economic Cohesion is that of **upward convergence**, which is defined as "an improvement in performance alongside a reduction in disparities among Member States in a given socioeconomic indicator" (Mascherini, 2020).

In this context Massimiliano Mascherini from Eurofound (a tripartite EU Agency, whose role is to provide knowledge to assist in the development of better social, employment and work-related policies) points out, that:

*For a long time the EU was seen as a world convergence machine for its capacity to propel poorer economies towards best performing countries, both in the economic and social dimension. Unfortunately, it stopped to work, because the 2008 crisis showed that the economic and social dimensions of the Union are not two separate entities, but they are interconnected together.*

Eurofound's video demonstrates it in even more detail. While watching the video, try to make a note of what the main objective of the EU's economic cohesion measures is. You will find the answer further on in the text following the video.



Figure 62: Video - [Eurofound 2021-2024 - Promoting social cohesion and convergence](#);  
Source: Eurofound, 2021

It can be stated that the main aim of activities carried out under the EU economic cohesion is to equalise development opportunities between the EU member states. It is therefore about stimulating economic processes in such a way that the EU becomes an economically coherent organism.

The EU economic cohesion is closely related to both social and territorial cohesion. But it is difficult to really analyse economic cohesion in isolation from the other two. Nevertheless, among the key measures of EU economic cohesion are three prominent elements:

- Gross Domestic Product per capita in Purchasing Power Standards (GDP PPS);
- Unemployment rate;
- Gross National Income (GNI).



## ECONOMIC COHESION



Figure 63: Economic Cohesion; Source: COPE graphic with images from Pixabay

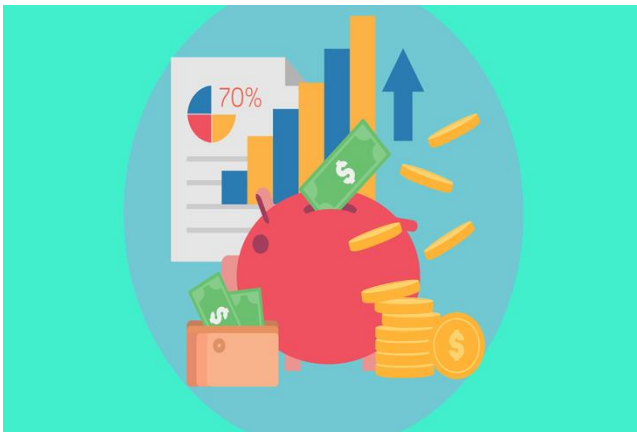


Figure 64: Economic cohesion; Source: Pixabay

According to the report "Report on the outcome of 2021-2027 cohesion policy programming" published in May 2023, EU Cohesion Policy funding in 2021-2027 will support the creation of 1.3 million jobs, and to increase the EU's GDP by 0.5% on average by the end of the decade, and up to 4% in some Member States. It will also help to deliver many common public goods, providing tangible and concrete benefits to European citizens, regions and cities. The announced goals are ambitious, but taking into account the challenges - very important.

More details concerning the measures of EU cohesion can be found [here](#).

### Exercise 1:

Familiarise yourself with the content of "[Cohesion in Europe towards 2050: 8th Cohesion Report](#)" published by the EC in February 2022.

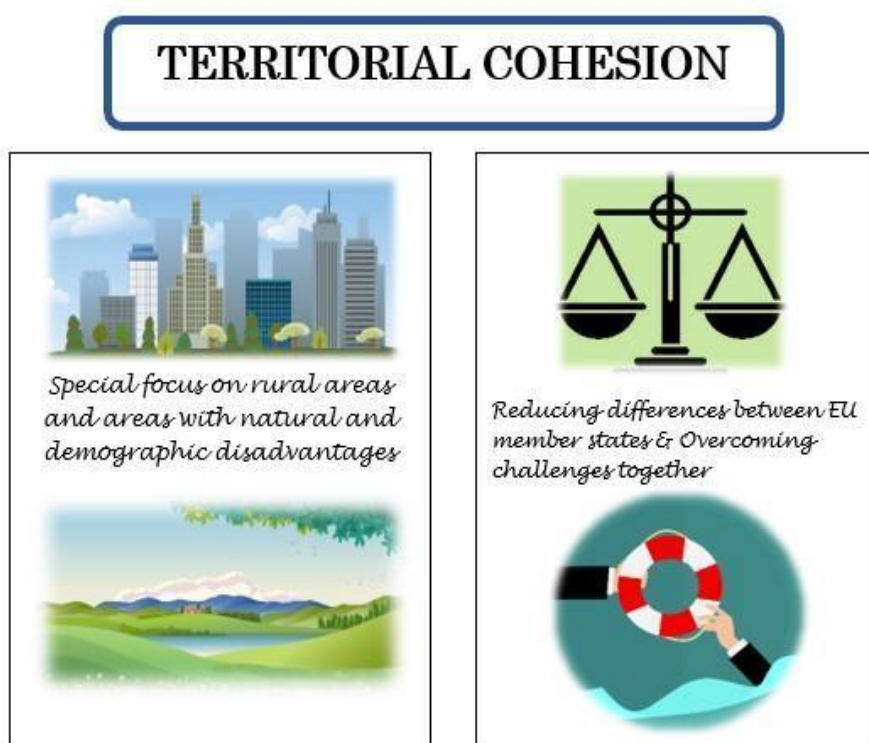
Focus on the part that refers to overcoming development differences between individual regions of the EU. Based on an analysis of Map 1, determine which two EU member states are quickest in closing these development gaps. In other words, which two EU member states are leaders in this area?

The solution to this exercise can be found at the very end of this module.

If you are interested in even more detailed information on economic cohesion in the EU check Module 8 which exactly deals with the economic basics of EU Cohesion Policy.

## **Territorial cohesion**

Territorial cohesion is promoting balanced and harmonious territorial development between and within countries, regions, cities and municipalities. Territorial cohesion seeks, in particular, to reduce disparities between the levels of development of various regions of EU member states, with a focus on least developed regions.



*Figure 65: Territorial cohesion; Source: COPE graphic with images from Pixabay*

Among the regions (see Module 4 for more information on regions within the EU) concerned, particular attention is to be paid to rural areas, areas affected by industrial transition, and regions which suffer from severe and permanent natural or demographic handicaps such as the northernmost regions with very low population density and island, cross-border and mountain regions.

In order to allow countries and regions to jointly tackle common challenges and find shared solutions in fields such as health, environment, research, education, transport, sustainable energy and more, the EU Cohesion Policy has two goals. One of which is **Interreg - European Territorial Co-operation**. Interreg is organised under multiple strands:

- cross-border (Interreg A),
- trans-national (Interreg B),
- interregional (Interreg C),
- outermost regions' cooperation (Interreg D).

The **ERDF plays a key role in a field of EU territorial cohesion**. It is worth mentioning that ERDF is intended to help to redress the main regional imbalances in the EU through participation in the development and structural adjustment of regions whose development is lagging.

The objectives of EU territorial cohesion are defined in the **Territorial Agenda 2030** adopted in December 2020. More details on the Territorial Agenda 2030 can be found [here](#).

The **NUTS (Nomenclature of territorial units for statistics) classification** plays an important role in shaping (planning) the territorial dimension of EU Cohesion Policy. The NUTS classification is a tiered system which divides European regions into three sizes. On the one hand, this is done for statistical purposes, and on the other hand, it facilitates socio-economic analyses of the regions.



Figure 66: Territorial cohesion; Source: Pixabay

In total, there are three NUTS classification levels:

- NUTS 1 (3 000 000 - 7 000 000 inhabitants);
- NUTS 2 (800 000 - 3 000 000 inhabitants);
- NUTS 3 (150 000 - 800 000 inhabitants).

Framing and application of EU regional policies happens mainly on the NUTS 2 level. More information on the NUTS classification can be found [here](#).

NUTS is therefore necessary to carry out analyses of the degree of socio-economic development of EU regions.

### **Exercise 2:**

The exercise concerns the smallest and the biggest EU member states in population ratio - Luxembourg and Germany and their NUTS structure. Based on the official Eurostat website dedicated to NUTS and mentioned above, please check what these structures look like. In other words, how many NUTS1, NUTS2 and NUTS3 units reflect the structure of Luxembourg and Germany?

The solution to this exercise can be found at the very end of this module.

## Political cohesion

The definition of political cohesion as "the commitment to a common political project" presented earlier and the reference to the issue of cohesion-effects of organisations and regimes at the international level certainly allow the functioning of the EU to be analysed in this context.

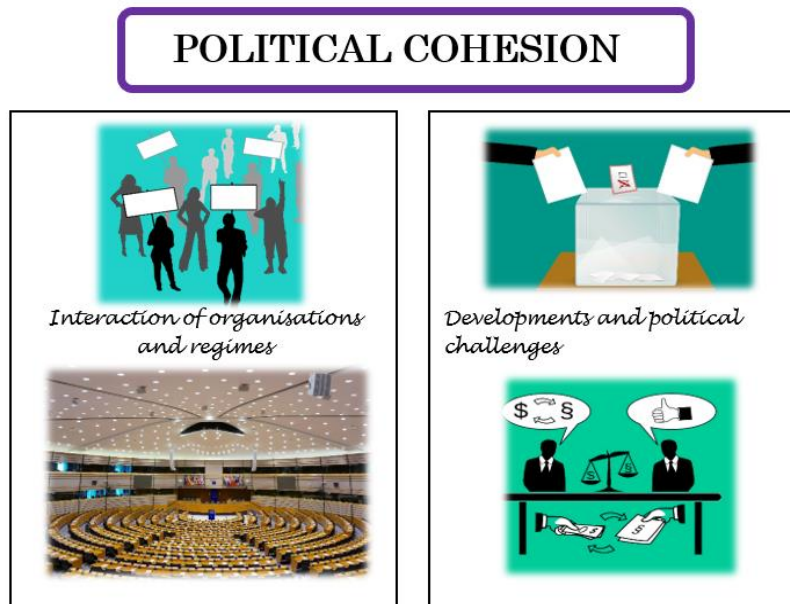


Figure 67: Political cohesion; Source: COPE graphic with images from Pixabay



Figure 68: Political cohesion;  
Source: Pixabay

There is no doubt that in the case of the EU, we can speak of both: (1) an organisation that is a "common political project" of (currently) 27 countries as well as (2) particular regimes, related to the functioning of the Union.

### Exercise 3:

In the Table below you can see a list of some EU countries. Please do some research on the countries (use a maximum of 60 minutes to work on this exercise) and check:

- where they are geographically located
- which political system they have
- which interests and motives each country might pursue in relation to the EU
- how each country deals politically with freedom of the press

Think also about current challenges, such as the Russian aggression in Ukraine. Please make notes of all that you notice in the table below. What can the interests of the states depend on? Also, think about the ways in which various interests can complicate cohesion.

EU Member State	Geographical position in Europe	Political System	Possible interests in relation to the EU	Position of the press/Freedom of Press
Germany				
Italy				
Sweden				
Poland				
Hungary				
Spain				
Estonia				

Your colleague Michael also filled in a blank table. Compare your answers with his. Are they similar? Do you agree with his observations? The solution to this exercise can be found at the very end of this module.

## Public opinion on EU Cohesion Policy

Public support for the EU's cohesion and regional policy strategies and activities is a key element affecting the legitimacy of, and citizen support for, these activities. We can measure public support both regionally and nationally (for example, distinguishing between net contributor and net recipient countries), but also at the level of the Union as a whole.

The EU's public opinion research agency, Eurostat, regularly (every two years) examines these issues and prepares reports accordingly.

The most recent (prior to the creation of this course) survey is from October 2021 and concerns primarily the views of EU citizens relating to the role of EU Cohesion Policy in combating the adverse effects of the COVID-19 pandemic. Almost two-thirds (69%) of respondents were aware that EU Cohesion Policy supports the post COVID-19 recovery. This survey shows that EU Cohesion Policy support for the recovery and the fight against the pandemic is well noticed. This awareness is particularly high in Member States such as Finland, Italy and Poland. In general, the overall awareness of EU-funded projects has increased (41%). This represents a 7% increase compared to 2011. Out of those who are aware of EU-funded projects, 80% think that they have a positive impact on the regions.

Please look at the results of this study, presented in a nutshell, for your country. You can find them [here](#).

### Exercise 4:

What is the level of awareness of these issues in your country? What proportion of respondents are aware of examples of EU-supported projects where they live? Take notes on these questions while reading about results of the study. Use a maximum of 30 minutes to work on this exercise.

## European media on EU Cohesion Policy

Another actor largely responsible for the public perception of the phenomenon of cohesion in the EU is the mass media. The way that media organisations present these issues determines to an important extent the place of these issues on the public agenda and the opinions of citizens expressed, for example, in the aforementioned opinion polls. On the other hand, journalistic coverage also has an impact and makes a difference for EU and local policy-makers.

The role of the media in these processes is usually viewed from several basic perspectives. First, the media not only present EU news but also redefine and reshape news, which can impact on citizens' attitudes to the EU. Secondly, by contributing to the development of a European public sphere and demos, the media can, in principle, enhance the legitimacy of the EU. We are talking in this context about the process of Europeanisation of national media (Mendez et al., 2020).

This process is undoubtedly an important element in building not only a European public debate, but also a common European identity. However, it is taking place at a different pace across countries and depends on the dynamics of events on the continent and globally.

If you are interested in even more detailed information on these issues check Module 6 of our MOOC. All these processes will be discussed more in detail there.

### **Exercise 5:**

The EU Cohesion Policy, intended to affect a significant proportion of EU citizens, can therefore be a good focus for the Europeanising media agendas within national public spheres. But is this the case? Please check it out – by using an internet search engine, type in 'European Union [and the name of the country in which you live]' and look for the first 10 results in the "News" category. Read the news items and check: How many of these texts deal with the EU Cohesion Policy? How are the actions and effects of cohesion policy described? Positively, negatively or perhaps neutrally?

Take notes on these questions while searching this information and prepare a brief essay. Use a maximum of 45 minutes to work on this exercise.

This time your colleague Michael prepared a similar essay, analysing the German case. Compare your results and observations with his work. You can find Michael's essay at the very end of this module.

### **Exercise 6 – Reflecting on EU Cohesion Policy:**

REGIOSTARS is a competition organised by the EC's Directorate General Regional and Urban Policies since 2008. Over the years it has become Europe's label of excellence for EU-funded projects, which demonstrates the impact and inclusiveness of development and cohesion.

Step 1. Watch the short videos about the fifteen projects - finalists of the REGIOSTARS 2022 competition [here](#).

Step 2. Choose the one that, in your opinion, best implements the idea of cohesion. Remember - it doesn't have to be the project that ultimately won.

Step 3. Justify why this project is the best. Prepare a short (max. 0,5 page) justification. Use a maximum of 60 minutes to work on this exercise.

Your colleague Michael also prepared such an essay. Compare your essay with his. Are they similar? Do you agree with his observations? You can find Michael's justification at the very end of this module.



## Prospects for the future

Cohesion processes in the EU must be seen in the broad context of global and regional political, economic and social processes. The future of these processes therefore depends not only on the decisions taken by the EU institutions in this regard, but also on a whole range of contextual, internal and external factors.

The challenges of the modern world mean that the EU must react to them, especially in the area of EU Cohesion Policy. Therefore, the European Commission established in January 2023 [the Group of high-level specialists concerned with the future of EU Cohesion Policy](#). The group reflects on how to maximise the effectiveness of the policy. The group is scheduled to meet in Brussels on nine occasions throughout 2023. The group brings together representatives of academia, national, regional and local politicians, socio-economic partners and representatives of civil society. The Director-General of the Directorate-General for Regional and Urban Policy appoints the group's members. The group will present its strategic recommendations till March 2024 and therefore end its activity.

The work of the Group and the other EU institutions responsible for planning and implementing EU Cohesion Policy in the coming years is likely to focus on several key issues.

### *Rule of law conditionality*

One of the most important current debates considering EU Cohesion Policy mechanisms is related to rule of law conditionality. It is hard not to agree that the rule of law is one of the founding values of the EU. The EU budget has an additional layer of protection in cases when breaches of the rule of law principles affect or risk affecting the EU's financial interests. This is thanks to a general regime of conditionality for the protection of the EU budget (a "conditionality regulation") that has been in force since January 2021. The conditionality regulation allows the EU to take measures, eg. suspension of payments or financial corrections, to protect the budget.

The importance of the rule of law is shown by the example of Central and Eastern European (CEE) countries, including Poland (but also Hungary). Due to reservations about respecting the rule of law, Poland has had difficulties in obtaining funding from Recovery and Resilience Facility, known in Poland as the National Reconstruction Plan (Krajowy Plan Odbudowy). Importantly, these are largely funds addressed to the EU Cohesion Policy. The condition for "unlocking" funds is the fulfilment of the so-called milestones, i.e. changes in Polish law concerning the judicial system. In other words, it is necessary to meet the conditions set by the European Commission.

More details concerning the general regime of conditionality for the protection of the Union budget can be found [here](#).

### *Learning from mistakes from the past*

Another problematic dimension of cohesion processes in the EU is the issue of political cohesion, which is definitely in need of new and decisive action and initiatives. Why is the EU unable to set up supranational structures in the contexts of security and defence policies although there is a dire need of them? For example, in the context of the threat of Russia, the USA might become an unreliable ally for the EU if Trump achieves re-election. Is it a cohesion problem that prevents the establishment of a highly integrated Common Foreign and Security Policy (CFSP) - or even a European army?

## Conclusion

While studying the content of Module 5, you had the opportunity to learn about definitions and concepts relating to cohesion processes in the EU, as well as the different dimensions of cohesion processes - social, economic, territorial and political. We also introduced you to the main actors involved in these processes - and the broad context of these phenomena. We hope that the exercises we have proposed have facilitated your effective acquisition of this knowledge and skills.

All these issues discussed in Module 5 of our course will be the subject of intense political and media debates in the coming years.

Do you feel prepared to participate actively and fully in them? If you are still not sure of the answer, we invite you to take the following modules of our MOOC. You will certainly not regret this decision!

## Further literature and contact information

For further reading, we recommend the following literature:

Aall, P. & Crocker, C. A. 2019. Building Resilience and Social Cohesion in Conflict. *Global Policy*, 10 (2), 68-75.

Castiglione, D. 2019, in: Bellamy, R. / Bonotti, M. / Castiglione, D. / Lacey, J. / Näsström, S. / Owen, D. & White, J.: The Democratic Production of Political Cohesion: Partisanship, Institutional Design and Life Form. *Contemporary Political Theory*, 18 (2), 282-310.

De Cuzzani, P. M. 2019: Political Cohesion, Friendship and Hostility. *NordicumMediterraneum*, 14(2).

Below you can find the contact information of authors of this Module:

**Michał Kuś** received his PhD from the Department of Political Science at the University of Wrocław (2010), presenting the thesis on the political and economic environment of the Spanish audiovisual media market. He has also taught several courses in political communication and journalism. In the period 2010-2013 he coordinated (fully) administrative and (partially) academic activities in the Polish part of the EU framework project the "Media Accountability and Transparency in Europe" (MediaAct) (FP7). His research focuses on media systems (especially in aspects of media control, ownership, and deregulation), relations between media and politics, media accountability and transparency, and journalism studies. He also works as project director for the European Journalism Observatory (EJO), Polish edition.

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**Kamil Glinka** received his PhD from the Institute of Political Science at the University of Wrocław (2018), presenting the thesis on urban policy and marketing communication in Poland. He has also taught several courses on EU Cohesion Policy, public governance, marketing and media communication. In 2018-2021 he conducted several international research projects such as "Urban Policy in the Strategic Perspective – from V4 to Ukraine" and "Understanding Identities and Regions. Perspectives on V4 and WB", both financed by the International Visegrad Fund (IVF). He also carried out a project "Urban dimension of European Community's policy – genesis and evolution" at European University Institute (EUI) in Florence (2022). Currently, he holds a position of the coordinator of the project "Urban Post-COVID Recovery in the V4 Countries" implemented within IVF Strategic Grant (2022-2025). His research focuses on cohesion policy, urban and regional

governance and media communication. He also works as Bernard Steinacher Fellow 2022-2023 funded by METREX (Network of European Metropolitan Regions and Areas).

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**Adam Szynol** received his PhD from the Faculty of Letters (2003) in the field of the daily press in Lower Silesia and quite recently his habilitation in the discipline of Social Communication and Media (2021) presenting the thesis on regional dailies transformation in Poland. As a former journalist he teaches several courses connected to regional/local media, TV language, news and commentary programmes on Polish TV. For more than a decade he was responsible for candidate admissions in the two fields of studies (Journalism and Communication Management) which are at the highest demand as every year there are more than 1000 candidates for both of them. Currently he became the head of the Journalism Department and also the editor-in-chief of "Journalism and Media" journal, listed on the Ministry of Education and Science scoring scientific journals. He is a co-editor of the Polish edition of European Journalism Observatory (EJO).

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**Christoph Schuck** is Chair/Full Professor of Political Science, Department of Philosophy and Political Science at TU Dortmund University (since 2013). He is furthermore Dean of the Faculty of Humanities and Theology at the TU Dortmund University (since 2016). Christoph Schuck is since 2019 the Co-Spokesperson of the "Graduate School on Political Cohesion (GSPC)" at TU Dortmund University and University of Bochum. Other research programmes under his coordination have been funded by VolkswagenStiftung, e.g. "Between Stability and Transformation: Regional and Transnational Cooperation in Central Asia and between Central Asia and Europe" from 2016-19.

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**Julia Lemke** is a student assistant at the Department of Philosophy and Political Science. She is currently studying social sciences and philosophy for a teaching degree and has already worked as a tutor for political science.

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## Solutions for Module 5:

### Exercise 1:

Latvia, Estonia

### Exercise 2:

Luxembourg: NUTS1 x 1; NUTS2 x 1; NUTS3 x 1

Germany: NUTS1 x 16, NUTS2 x 38, NUTS3 x 401

### Exercise 3:

EU Member State	Geographical position in Europe	Political System	Possible interests in relation to the EU	Position of the press/Freedom of Press
Germany	central Europe	parliamentary democracy	unity in national and EU interests, efforts to end dependence on Russia, interest of strong cohesion and unity in the EU	High degree of press freedom, broad media landscape, media independent and critical.
Italy	southern Europe	parliamentary democracy, Government currently forms a right-wing alliance	Under the government of right-wing parties, national interests are increasingly pursued, but cooperation with the EU remains.	Freedom of the press exists, but is partly hampered by corruption, some media companies do not operate independently
Sweden	northern Europe, long coast on the Baltic Sea	parliamentary monarchy separation of powers	Agrees with the interests of the EU on many points, particularly strong interest in strengthening security through proximity to the Baltic Sea and Russia respectively	High level of press freedom, although since 2015 there have been reports of threats to some journalists in relation to their coverage of the migration issue.

Poland	eastern Europe, with border to Ukraine, was a satellite state of the Soviet Union	semi-presidential system of government, Government efforts to control press and judiciary, threat to	Government advocates strengthening national interests and own sovereignty, interest to strengthen security against Russia	Freedom of the press has deteriorated in recent years, independent work is made difficult by the government, critical media are exposed to severe conditions.
Hungary	eastern Europe, with border to Ukraine, was a satellite state of the Soviet Union	parliamentary democracy (according to the constitution), In the course of Orbán's policies, there have been increasing deficits in democratic and constitutional structures	Mixed interests, a clear line is not always discernible, Hungary often pursues its own interests that are against those of the EU, at the same time the state also benefits from the EU.	Erosion of media freedom and pluralism is observed in recent years, especially considering issues like independence of public service broadcasting and limiting media pluralism.
Spain	south-west Europe	parliamentary monarchy	Spain is pro-EU and aligns with the general interests of the EU on many issues.	High freedom of the press, even if there are occasional reports accusing some media of political influence.
Estonia	eastern Europe, with border to Russia, was part of the Soviet Union	parliamentary democracy	Aligns with many EU interests, Great interest in close cooperation with the EU.	Positive development of press freedom, the media landscape is diverse and independent.

**Exercise 5:**

### **Michael's essay:**

In my case, I did research for Germany. Here, only a part of the search results deals with cohesion policy. In the broadest sense, three of the initial ten results can be assigned to the Cohesion Policy, which is described in a rather positive to neutral way. For example, one article describes how the EU wants to be better prepared for large forest fires in the future and how it can intervene more effectively. In this example, the cooperation between the EU states is indirectly praised, but the procedure is explained neutrally. In the other articles, a value judgement is mainly made when it comes to the dangers to Cohesion in the EU, for example through conflicts of interest between the EU and its member states.

The other articles are less about Cohesion in the EU and more about competition between the member states. For example, attention is drawn to economic differences and various figures are compared. In general, it can be said that EU Cohesion Policy is not particularly present in the case of Germany, but it is presented rather positively, even if implicitly.

### **Exercise 6:**

#### **Michael's justification:**

In my opinion, the best project is the **e-Schools pilot** project implemented in Croatia. There are several reasons for this, but it seems to affect the lives of the residents in a positive way. It is worth mentioning that the project provides ICT equipment and digital education tools to about 150 schools both primary and secondary in Croatia. The project helps 10% of the country's schools raise their competencies in the field of ICT for teaching and learning. With support and training for teachers and principals, the project's comprehensive approach ensured long-term learning based on sustainability. It seems to me that the project is really needed, because it focuses not just on contemporary problems, but also provides opportunities for the future development of children and youth in Croatia. In my opinion, education is one of the most important sectors of the EU Cohesion Policy.

# Module 6 – EU & The Role of Media

## Basic Information

Module number	6
Duration/study load	8 hours
Keywords	Brussels press corps, Cross-border journalism, Disinformation, EU correspondent, European public sphere , "Euro-journalism", Journalistic networks, News framing, News values
Learning outcomes	<p>At the end of the module, students should...</p> <p>be able to understand the role of journalism in the European Union and for a democratic European society;</p> <p>be able to understand the values that underlie professional choices linked to European reporting</p> <p>be able to identify what is relevant for news stories for various European audiences</p>
Description	<p>In Module 6, students will learn more about the role of media and journalism in the EU. For example, they will get to know the Brussel's press corps, how Europeans look at EU issues and how journalists have covered the beginning of the cooperation between European countries after World War II. They will get to know definitions, examples and case studies of these topics. Research results and news stories will be presenting media best practices in European reporting.</p>
Contact to the author	<p>Michał Chlebowski (<a href="mailto:mchlebowski@swps.edu.pl">mchlebowski@swps.edu.pl</a>) SWPS University</p> <p>Cristina Nistor (<a href="mailto:cristina.nistor@fspac.ro">cristina.nistor@fspac.ro</a>) , Rares Beuran (<a href="mailto:beuran@fspac.ro">beuran@fspac.ro</a>) , Ancuta Stavar (<a href="mailto:ancuta.stavar@fspac.ro">ancuta.stavar@fspac.ro</a>), Rémi Almodt (<a href="mailto:remi.almodt@fspac.ro">remi.almodt@fspac.ro</a>) Babeş-Bolyai University</p> <p>Marcus Kreutler (<a href="mailto:marcus.kreutler@tu-dortmund.de">marcus.kreutler@tu-dortmund.de</a>), TU Dortmund</p>



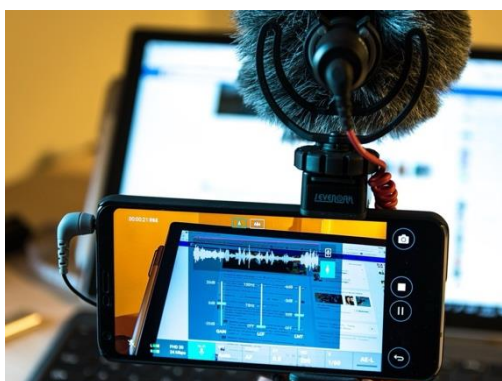
## Glossary

Brussels press corps	The Brussels press corps consists of journalists from both EU member states and third countries, each with diverse backgrounds and social profiles.
Cross-border journalism	Cross-border journalism is an innovative journalistic strategy for transnational reporting, in which journalists from different countries cooperate with each other and research on a topic together.
Disinformation	The deliberate spread of false or misleading information, with a specific intent to deceive the audience.
EU correspondent	A person employed to report for a newspaper or broadcasting organisation from another country.
"Euro-journalism"	Journalists that are reporting in and about the EU.
European public sphere	Citizens from European societies exchange ideas and information that have the potential to influence European political life, particularly within the European Union.
Journalistic networks	All contacts a journalist has.
News framing	News framing is based on the assumption that the media, through selection and exclusion, emphasise certain aspects of the news and thus trigger a certain view of a problem, interpretations and evaluations in the recipient.
News values	Factors that influence the selection and presentation of events in their publication as news.

## About this module

In this module, we will guide you through various definitions, examples and case studies, so that in the end you will understand better the role of media in covering the EU. We summarise for you some key research results from journalism studies and mass communication, and address the specific news framing of European issues in European media. We will also provide you with ideas on how to facilitate for your audience a wider perspective on EU-related topics – even though you are most likely to produce your story in the national context of your local medium. As a key learning outcome of this module, you will gain a better understanding of the role of journalism for European issues, and also the way media communication functions in the European Union. You are going to learn about these topics through reading research results and news stories that will be presenting media best practices in European reporting. Let's start!

## How does research address the role of the media in the EU?



*Imagine that you – as a second- or third-year journalism student - are asked by your professor to help to organise an international research conference. They tell you the conference title: “The role of media for the coverage of EU matters”. Your professor and the team want to involve you in the whole planning process, to make sure the topics and speakers are not only relevant for the academic crowd, but also for you – future media practitioners, and the students at the institute. So, you strive to be creative and propose ideas for the agenda of the conference, including various topics and speakers.*

*Figure 69: You help planning an international research conference; Source: Pixabay*

## The Role of Media for Europe

You are probably asking yourself: Where do I start? Proposing ideas for an academic conference agenda may sound like rocket science, but who can manage it if not you ☺?

Of course, you don't want to enter the first meeting with your professor and the team without at least getting an overview of recent research results on EU coverage. What do researchers look at if they focus on “Europe” and the media?

### Exercise 1:

Open [ChatGPT](#) and type in:

“What do we know from research about the role of media for EU matters?”

Disclaimer: This is an experiment. Let's test how AI could enhance academic research. But we always recommend a cross checking process based on fact checking and critical thinking.

Take notes on what ChatGPT provides you as a possible answer to the question. Then compare it with our answer that we received from ChatGPT, which you can find in the solutions at the very end of this module.



Figure 70: Research - The role of media for EU;  
Source: Pixabay

### Media as gatekeeper

Thousands of events take place across Europe every day, but only some of them make it onto the public agenda. The role of a journalist is essential in setting the public agenda - your news selection (as a journalist) may have a strong impact on your audience's perception of EU politics.

Therefore, it is important to reflect why media play such an essential role for Europe – they are there to provide meaningful communication and accurate, objective and relevant information about EU matters.

They also serve as a “link” between European Union institutions, member states, relevant actors and institutions, and European citizens. Journalists are often described as having the function of gatekeepers - they investigate and analyse, and they are expected to transmit accurate, objective, and relevant information that citizens rely on when making important decisions (such as voting – in local, national and EU elections).



Figure 71: Journalists often have the function of a gatekeeper; Source: Pixabay

A recurring topic for many decades has been the question if media in Europe can also help create a European public sphere – as shortly discussed in Module 1. While media systems remain tied in the national context, and truly “European media” have remained rather elite projects so far, there are much more chances now in the digital era to “europeanize” your coverage – even though it is addressing national audiences. This is a way how you can sensitise your audience for the European dimension in local politics – and how you can make your public aware of how topics are being discussed, and solved, in other EU countries.

## A first glimpse into research results

The afternoon before your first meeting with the university team, you sit down at your computer and enter [Google Scholar](#). Which keywords do you type in? Try “EU coverage media”. This is just the first page of the results you retrieve. Wow, really interesting stuff out there!

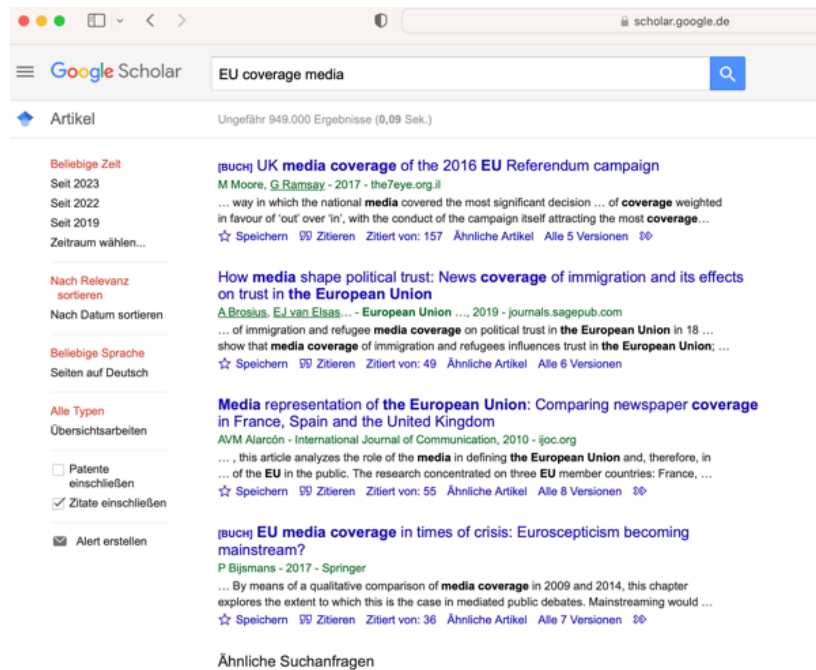


Figure 72: Finding out more about EU coverage media; Source: Own screenshot

As some of you might not have a VPN client, and because university libraries in EU countries have different resources to provide you with literature, we have picked here one exemplary research article which is available for easy download:

[Brosius, A., van Elsas, E. J. & de Vreese, C. H. \(2019\). How media shape political trust: News coverage of immigration and its effects on trust in the European Union. European Union Politics, 20\(3\), 447-467.](#)

### Exercise 2:

You start to read the first articles recommended. Because the studies are so much more interesting than you actually expected.

“Hey – I may look a bit strange because I lost myself in some really interesting studies on media and the EU. I mean, this is so important at the moment – with the European elections upcoming, the Zero Carbon challenge, the war in Ukraine and what it means for Europe. Did you know that...”

Write down five bullet points from the research article you have looked at.

The solution to this exercise can be found at the very end of this module.

## Coverage of Europe – travelling back in time

Watch [this historical footage](#) from the early 1950s to see how journalists have covered the beginning of the cooperation between European countries after World War II:

Researcher [Martin Herzer](#) (2017) has analysed the history of “Euro-journalism” – as he coins it – since the 1950s. Back then, a group of Western European journalists worked as press correspondents in “Brussels’ European bubble” (Herzer, 2017, p. 99). He argues that the narratives of European integration adopted by these early EU journalists have continued to impact successive generations of journalists covering the EU.

According to recent studies, EU correspondents based in Brussels continue to play a key role for reporting EU issues (Michailidou et al., 2022). Journalists covering the EU strive to “translate” the EU’s complexity to national audiences, into more simple terms, emphasising the national audience interest and the national story angle (Kümpers, 2022, p. 11).

### The Brussel’s press corps

Since EU enlargement in 2002, the press corps in Brussels has been growing considerably – from 400 members in 2002 to 1,330 journalists in 2013. [Raeymaeckers et al. \(2007\)](#) examined the evolution of the press corps in terms of nationalities and news organisation type and the mechanisms shaping information flow, and links the expansion of news media correspondents to European Union institutions to the EU’s growth in terms of member states.

However, numbers of EU correspondents have been decreasing since 2013, with 811 members in 2020 ([Council of the EU, 2022](#), p. 10). The number of accredited journalists to the EU (besides Belgian journalists) was highest for correspondents from Spain (45), Germany (44), Italy (36) and France (34). Very few accredited journalists came from small EU countries like Malta (1), Slovakia (2), Latvia (2) – but also from a large EU member state like Romania (3).

Check out the numbers for your own country – and try to find reasons for why numbers are rather big/rather small!

Raeymaeckers et al. (2007) emphasise that economic factors influence the flow of information, as the number of permanently accredited journalists decreases. This means that financial resources influence the allocation of journalists to international institutions like the EU, and therefore have an impact on how much attention and salience EU issues and institutions receive.

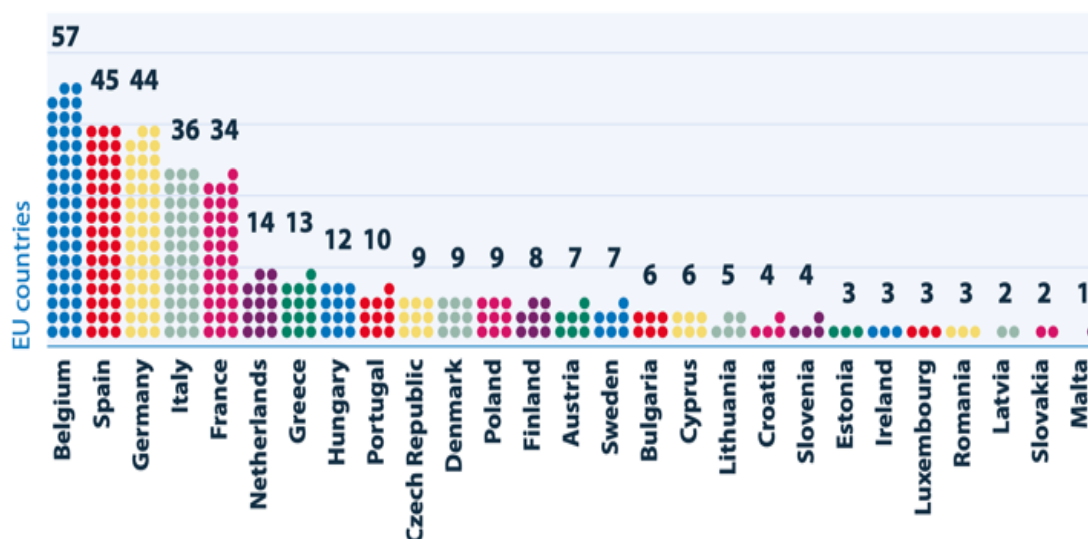


Figure 73: Number of EU-correspondents; Source: *Council of the EU, 2022, p.10*

### EU correspondents - a recent survey

A [survey of EU correspondents](#) commissioned by the Council of the EU confirms many insights into the challenges and constraints of the Brussels press corps. Here is one telling quote from the summary: “Most journalists work for national media and produce their coverage for national audiences. The findings also show that many journalists are in a way generalists: they cover EU affairs but are also very often asked to cover other foreign or domestic affairs (e.g., NATO, Belgium). In fact, only about 20% of journalists in the 2021 survey sample cover EU affairs only and a majority cover both EU and other foreign affairs (68%).”

### Role of the media in shaping a European public sphere

The idea of a European public sphere has been a subject of debate for a long time, and many researchers believe that it can be formed by making European topics more prominent in national media (Machill et al., 2006). In reality, EU topics continue to receive little coverage in national media, and EU-level actors and institutions are not highlighted – and scrutinised - enough. National perspectives dominate.

[The study](#) also shows that EU reporting in various states significantly increases during specific events: Events related to EU policy, like European Council sessions or European elections, lead to a considerable increase in EU reporting. National events in EU member states can either trigger more EU reporting or overshadow it, depending on the circumstances. Events outside the EU – a recent example would be the war in Ukraine - can dominate reporting and even overshadow EU-related events.

[Preston \(2009\)](#) conducted a series of 100 interviews with journalists on European news culture and practices and found that journalistic practices and culture are mainly shaped on the national level and not a European one. He points towards both a lack of a common journalistic culture in both the European geographical context and the European public sphere.







Watch this short video clip explaining the idea of the project:

[Let's meet the Arena for Journalism in Europe](#)



**Arena for Journalism in Europe**

Figure 75: [Introduction Video Arena for Journalism in Europe](#); Source: Arena for Journalism in Europe

News agencies from across EU member states have recently set up the European Newsroom (enr) in Brussels to enable cross-border perspectives on European issues, even if media organisations have only limited funding. [Check out this](#) ground-breaking initiative

### **Disinformation and EU coverage**

Disinformation is widely considered as a big challenge for media practitioners and newsrooms. There are many projects helping you to deal with fake news – check out for example the [UNESCO Handbook “Journalism, ‘Fake News’ and Disinformation”](#).

How does disinformation impact coverage of EU issues? [A new study](#) (Lecheler et al., 2023) titled "Disinformation and the Brussels Bubble: Concerns and Competences of EU Correspondents in a Digital Age" offers intriguing insights into EU correspondents and their approach to the issue of disinformation:

- EU correspondents are concerned about issues like funding, resources, disinformation, and declining media trust, but they don't necessarily see these as immediate EU challenges. They might think these problems are better addressed at the national level or are too universal for EU policy.
- The research also suggests that journalists from countries with higher press freedom levels are less concerned about disinformation affecting citizens, both at the EU and national levels.
- Journalists working for traditional media seem more concerned about disinformation compared to those in digital media. They also feel less confident in detecting disinformation.
- Journalists believe that disinformation is a problem for the profession and citizens but are generally confident in their own abilities to deal with it, a phenomenon known as the "third-person effect."

## News Framing and EU Reporting

A news frame serves as a blueprint that journalists use to craft news stories, with the aim of making them more accessible to their audience. These news frames, in turn, play a potentially significant role in shaping public perceptions, understanding, and support for contemporary political and economic issues, such as the EU. To quote Denis McQuail, "news is presented within frameworks of meaning which derive from the way news is gathered and processed."



Figure 76: News frames play a potentially significant role in shaping public perceptions; Source: Pixabay

Standard organisational procedures, work routines, and news values have a strong impact on the news being delivered by the media. News possesses little value unless it is embedded within a meaningful framework that organises and structures its content (de Vreese, 2003).

Claes de Vreese suggests a list of key news frames that helps you in analysing EU coverage:

1. The “*conflict frame*” emphasises clashes between individuals, groups, institutions or countries. As an example, here is a [EURACTIV report](#) related to the news materials about the military support for Ukraine during the war.
2. The “*human interest frame*” connects the story to a human face, an individual fate, or an emotional angle to present an event, issue or problem. As an example, here is a [Euronews report](#) about the mission rescuing migrants in the Mediterranean Sea.
3. The “*responsibility frame*” presents an issue or problem in such a way as to attribute responsibility for causing or solving the issue to either the government or an individual/group. Look at this [story from Politico](#) about empowering better self-care.
4. The “*morality frame*” interprets an event or issue in the context of religious tenets or moral prescriptions. As an example, here is an [item from Euronews](#).
5. The “*economic consequences frame*” focuses on the economic impact an event will have on an individual, group, institution, region or country. As an example, here’s another [item from Euronews](#).

#### **Exercise 4 – Detecting news values:**

You'll now see five news stories that correspond with at least two news values, as outlined in detail by [Harcup & O'Neil](#) (2017). All news stories have been published by European newsrooms and fulfil two specific news values. Select one news value you consider most relevant for each specific story.

Here are the 15 news values:

- Exclusivity,
- Bad news,
- Conflict,
- Surprise,
- Audio-visuals,
- Shareability,
- Entertainment,
- Drama,
- Follow-up,
- Power Elite,
- Relevance,
- Magnitude,
- Celebrity,
- Good news,
- News organisation agenda

And these are the news stories you should work with:

- Example 1: [Politico Europe - Germany and Poland spar over the Oder River](#)
- Example 2: [Euronews - In a win for Germany, EU agrees to exempt e-fuels from 2035 ban on new sales of combustion-engine cars](#)
- Example 3: [Deutsche Welle - Macron and von der Leyen to talk Ukraine on China visit](#)
- Example 4: [Euranet - Cohesion policy, a tool to revitalise the EU](#)
- Example 5: [EU Observer - EU industrial policy forgets one important detail: people](#)

The solution to this exercise can be found at the very end of this module.

## Interim summary



Figure 77: Reporting about the EU is a challenge;  
Source: Pixabay

Our main takeaway from the analysis of academic studies so far is the insufficient and inconsistent coverage of the EU. National perspectives take precedence, EU-related subjects often receive minimal attention in national media, and EU-level figures remain largely obscure. Significant differences in media freedom, professionalisation, and cultural norms exist among EU countries. Furthermore, EU correspondents recognize the importance of issues such as disinformation, but tend to favour addressing these challenges at the national level.

Can we strive for improvement? Let's delve into this question in the following section of this module. But before we do so, let's also look at best practices in the coverage of EU issues. Below, you'll find links to journalistic stories that can inspire you!

- Reuters: [The meat magnate who pushed Putin's agenda in Germany](#)
- euobserver: [A new EU law, and the battle to protect Europe's journalists](#)
- Investigate Europe: [Untaxed](#)
- Politico: [Elections in Europe](#)

### Sources for your own coverage – News from EU institutions

While media researchers underline some shortcomings of EU coverage, you can, as a journalist, do a better job! In some newsrooms, editors continue to argue that EU stories would be too costly - sending a reporter to Brussels implies travel, accommodation and other related costs. But this is not the case anymore. There is so much to report – and “raw material” is available even without travelling to Brussels.

First, you can use material offered by [EU press services](#). The available material is for free and definitely can be an important part of your reporting. But don't forget the EU is just one stakeholder, and there are so many others. For an objective news story, you need to include their voices as well. You always have to be careful when preparing critical, professional and comprehensive reporting, so you cannot rely only on EU-related sources!

Remember that there are an estimated 25,000 lobbyists working in Brussels. They represent the interests of corporations, and their lobby groups and have a great influence on EU regulations. As a critical journalist, you should follow [websites like Lobby Planet](#) that “traces the invisible lines of political power that criss-cross the city to give you an idea of how lobbyists work, who the biggest players are, where they meet, and what issues they focus on”.

Your critical and objective approach to news delivered by EU-dependent institutions can be strengthened in cooperation with other EU correspondents. Associations like the [Press Club Brussels](#) are good places to exchange thoughts and meet media professionals from around the world. They can also provide an important insert for your reporting.

In your reporting, you can use raw materials like press statements, press conferences, press releases, and video/audio/photo content delivered by EU agencies.

These tools are a relevant source of information. But again, it's just a starting point to your story. Your job is to confront this information with reliable experts, independent data-analysts, NGOs and other stakeholders. Only then will your reporting be balanced and trustworthy for your audience.

[The European Union communication websites](#) provide easy-to-access current and archived information on EU topics. In this case, the EU is communicating itself in order to inform EU media, citizens and other interested actors about its actions and decisions.

You can use the available filters to sort the EU's institutions press releases by date or source - to proceed more quickly with your news gathering process. And here you also have the link to the [press contacts in EU institutions and agencies](#).

Most of the content is available in all the EU's languages, which makes it easy to access!

If you need quick access to more specific information related to the activity of the European Parliament and also to useful press contacts you can simply visit the [European Parliament Press Tool Kit](#), which is especially designed for journalists. So, if you want to cover European elections, that's exactly the place you want to visit for updated information. In the context of [audiovisual services and multimedia content](#) provided by the European Parliament, this includes live and archived events.

### EU's Video News

The [Audiovisual Service](#) of the European Union provides semi-edited footage that is intended to help journalists to produce their own news reports and edited visual media content, in various digital formats, presenting European Union's policies and actions. You can easily access this material. It is a good starting point for your story development process. But, please don't use this service as a substitute for other news gathering techniques and interviews with actual stakeholders.

### EU's Photo News

Photos can be accessed from the [EU's database](#) of the main events, where you can find illustrative pictures for news stories on EU matters, a calendar outlining the upcoming photo coverage of future events, and a photo gallery of EU leaders.

The photo library includes professional photographers' images, which are offered free of charge for EU-related informational and educational purposes, just like the rest of the audio-visual content.



*Figure 78: Photo library from the EU's database;  
Source: European Union, 2023*

## EU's Audio News



Figure 79: The EU produces podcasts;  
Source: Pixabay

The EU produces various podcasts. You can use them to get more context to your reporting. As always, you need to be careful and bear in mind that this is not an independent source of information. Here are some examples from the [podcast](#) list: Europe Calling, Let's Talk EU Space, Urban Reverb, Science on the Menu, EU Finance - The Future of Finance.

## EU's Social Media News

If you want an original and dynamic insert for your student news report, you can check the news via the European Commission's social media platforms (Facebook, Instagram, X [formerly Twitter]). Also, you can follow all news released via the [social media platforms of the European Parliament](#). Updated information on The Council of the EU and the European Council can be followed [on each institution's social media](#).

## Influencers and EU issues

EU institutions are hiring influencers to address the younger audience. You can use them as a tip-sheet for your reporting, but again, remember – they can never be your sole source of information. You always need to have a critical approach.

Have a look at some examples:

The EP is already working with several influencers. In Germany, for example, the influencer [Diana zur Löwen](#) regularly posts content about the EU elections. In another example, Parliament cites an interview by Dutch influencer [Jeanne de Kroon](#) with MEP Jan Huitema on the action plan for the circular economy and specifically on textile waste.

Other EU agencies, like [EUROPOL](#), have been developing their social media strategies on how to use influencers for their marketing. [You can find out more here](#).

## Media practices in covering the EU

Where can you find interesting examples of EU coverage?

There are plenty of newsrooms and media projects focusing on various dimensions of Europe - its social and cultural life, economics, politics, sports, youth and more.

Now we'll take a look together at some media news organisations that cover Europe intensively – and may provide a lot of inspiration for your coverage of European issues.



Figure 80: Some media news organisations cover Europe intensively; Source: Pixabay



## **Newsrooms providing European coverage**

[EURONEWS](#), launched in Lyon, 1993, covers world news from a pan-European point-of-view. The newsroom is multicultural and multilingual, and correspondents across the continent bring their perspectives to the media project.

Smart Regions is a special section of the Euronews website that shows how Cohesion Policy projects are helping people live better lives across the EU. You can access the webpage [here](#).

[EURACTIV](#) is an independent pan-European and multilingual media network covering EU affairs, also adding national as well as local angles. It was launched in 1999.

[EURANET PLUS](#) is a network that gathers 15 public and private broadcasters within the European Union. It broadcasts professional reporting on EU affairs in 15 languages to more than 13.8 million daily listeners.

[POLITICO EUROPE](#), launched in 2015, is the European subsidiary of the news organisation Politico and reports on political affairs of the European Union. Based in Brussels, with additional offices in London, Berlin and Paris, Politico Europe delivers news reports covering the EU institutions via the online platform politico.eu, a weekly magazine and newsletters such as Brussels Playbook, Playbook Paris or London Playbook.

[EUobserver](#) is an online independent newspaper established in Brussels in 2000, producing European reporting that the newsroom considers essential for European democracy.

## **Conclusion**

Throughout this module, you have learned about impactful studies on media and mass communication in the EU. You've also reflected on the role of mainstream and social media in Europe, and about the specific news framing when it comes to covering the EU. The module has furthermore introduced you to the public communication instruments of the EU, which may serve as material for your own reporting about EU matters. You've also seen several examples of European reporting practices, to provide practical and highly useful guidance for your own reporting. Congratulations on completing Module 6!



## Further literature and contact information

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### **Institutional:**

The European Media Industry Outlook, May 2023 - <https://digital-strategy.ec.europa.eu/en/library/european-media-industry-outlook>

Digital News Report 2023 - <https://reutersinstitute.politics.ox.ac.uk/digital-news-report/2023>

PEW Research Center - <https://www.pewresearch.org/search/Europe>

### **Journalistic:**

The Guardian - Europe - <https://www.theguardian.com/world/europe-news>

POLITICO Europe - <https://www.politico.eu/>

Deutsche Welle - <https://www.dw.com/>

Euronews - <https://www.euronews.com/>

EU Observer - <https://euobserver.com/>

EURANET PLUS - <https://euranetplus-inside.eu/>

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## **Solutions for Module 6:**

### **Exercise 1:**

The role of media in shaping public opinion and influencing EU matters is a complex and multifaceted topic, and research in this area has provided valuable insights into the relationship between media and the European Union. Here are some key findings and observations from research on this subject up to my last knowledge update in September 2021:

1. **Agenda-Setting:** Media plays a crucial role in setting the agenda for discussions on EU matters. Through their selection of news stories and the prominence given to specific issues, media outlets can influence what topics are at the forefront of public and political discourse.
2. **Framing:** Media outlets can frame EU-related issues in different ways, affecting how the public perceives these matters. The framing of an issue can determine whether it is viewed as a problem or an opportunity, and it can shape the public's attitudes and opinions.
3. **Information Dissemination:** The media serve as important channels for the dissemination of information related to the EU. They help in providing citizens with essential knowledge about EU policies, institutions, and decision-making processes.
4. **Influence on Public Opinion:** Research has shown that media coverage can influence public opinion on EU matters. The tone and emphasis of news reporting, as well as the choice of sources and experts interviewed, can shape how the public views EU policies and actions.
5. **Mediatization of Politics:** The media have played a significant role in the mediatization of EU politics, where political actors and institutions have to adapt to the demands and dynamics of the media environment. This has led to changes in political communication strategies and increased focus on image and presentation.
6. **EU Communication Strategies:** The EU institutions themselves have recognized the importance of effective communication and have developed communication strategies to engage with the media and the public. Research has examined the impact and effectiveness of these strategies.
7. **Media Pluralism:** Research has also focused on the issue of media pluralism in the EU, including concerns about media ownership concentration and its potential impact on diverse and independent reporting on EU matters.
8. **Social Media and Digital Platforms:** The rise of social media and digital platforms has transformed the media landscape and how EU matters are discussed. Research has explored the role of social media in shaping public opinion and fostering EU-related discussions.
9. **Transnational Communication:** The EU's transnational nature has created challenges and opportunities for media coverage. Research has examined how media outlets across member states cover EU issues and the extent to which a European public sphere exists.
10. **Trust in Media:** Trust in media outlets, including their reporting on EU matters, has been a subject of research. Trust in media can influence how the public perceives EU-related news and information.

It's important to note that the role of media in EU matters continues to evolve, and the landscape may have changed since my last knowledge update in September 2021. Research in this area is ongoing, and new developments in media and communication technologies may have further impacted the relationship between media and EU affairs.

### **Exercise 2:**

- Increased coverage of refugees, but not general immigration, was linked to reduced trust in the EU.
- Favourable refugee coverage was also associated with reduced trust, possibly indicating dissatisfaction with the EU's handling of the refugee crisis.
- The influence of media coverage on trust varied among citizens with different political ideologies, with right-wing citizens more negatively affected by pro-immigration coverage.
- Immigration attitudes became a more critical predictor of EU trust during the migrant and refugee crisis, irrespective of media coverage.
- Positive media coverage of the EU and greater media visibility of European integration were associated with increased trust in the EU.

### **Exercise 3:**

1. "How can the detection of fake news be improved, and what strategies can be employed to increase awareness about disinformation in contemporary media environments?"
2. "What strategies can be implemented to incorporate cross-border perspectives on European issues into the news agenda, ensuring a more comprehensive and interconnected coverage of EU-related topics?"
3. "In what ways can the media effectively engage and capture the attention of the younger generation on matters related to the European Union?"
4. "What factors contribute to the prevalence of national perspectives dominating European Union coverage, and what measures can be taken to promote a more balanced and comprehensive representation of EU-related issues in the media?"
5. "What is the influence and role of social media in shaping the landscape of European Union coverage, and how does it impact public perceptions and discourse surrounding EU-related matters?"

### **Exercise 4:**

- Example 1: Politico Europe - Germany and Poland spar over the Oder River.  
The story emphasises Conflict and Power Elites as news values, as it deals with an internal EU conflict and two countries perceived as significant member states.
- Example 2: Euronews - In a win for Germany, the EU agrees to exempt e-fuels from the 2035 ban on new sales of combustion-engine cars.  
The story focuses on Magnitude and Surprise, as the news values stem from impact on people and an element of surprise within current developments.

- Example 3: Deutsche Welle - Macron and von der Leyen to discuss Ukraine on China visit. The news values of Power Elites and Conflict apply, as two major political actors appear, and a possible conflict with China is hinted at.
- Example 4: Euranet – The EU’s Cohesion policy, a tool to revitalise the region. Exclusivity and Power Elite apply as news values, as the story features exclusive interview material and a political actor at an EU level.
- Example 5: EU Observer - EU industrial policy forgets one important detail: people. Magnitude and News organisation’s agenda apply, as a possible impact on people is reported on and the news organisation usually features critical angles on EU policy.

# Module 7 – Local Angles in Stories

## Basic Information

Module number	7
Module title	Local angles in stories
Duration/study load	8 hours
Keywords	Cohesion Policy; European Union; local angle; brainstorming; stakeholder mapping;; research; reporting; Kohesio;
Learning outcomes	<p>At the end of the module, students should...</p> <ul style="list-style-type: none"><li>...be able to recognize the link between local news issues and the global policies</li><li>...be able to use broad information and select newsworthy issues on the basis of in-depth research, parting from raw data and complementary sources</li><li>...be able to value sources' information, by selecting information on the basis of reliability, crisscrossed sources and fact-checking at a local level</li><li>...be able to explain the selected information and interpret it considering its value on a local agenda</li></ul>

Description	<p>Module 7 provides students with knowledge on interesting local angles for stories on EU matters, especially EU Cohesion Policy. EU decisions seem to come from very ‘far’ away but they have influence on everyone’s life.</p> <p>These impacts are summarized by the 2021-2027 program and its priorities: to create “a more competitive and smarter Europe”; to pursue “a greener, low carbon transitioning towards a net zero carbon economy”; to strengthen “a more connected Europe by enhancing mobility”; to increase “a more social and inclusive Europe”; and to enhance the sense of “a Europe closer to citizens by fostering the sustainable and integrated development of all types of territories”.</p> <p>This module wants to show how you can make use of local angles when you make stories about how your country benefits from or contributes to EU Cohesion Policy.</p> <p>The local window elaborates on EU coverage in the national, regional and local press and on finding local data.</p> <p>With a guided exercise on brainstorming techniques, Module 7 teaches you how to find ignored angles, how to combine interesting perspectives on a topic. Reports on particular topics and measures should be covered by news and video. Journalist genre ‘interview’ should be stressed out in order to improve this particular skill.</p>
Sequentiality	<p>The content of this module is linked to the content provided by Module 2, 3, 4, 5 and 6. The knowledge and understanding of EU Cohesion Policy is required.</p> <p>Modules 8 and 9 will follow up on this module.</p>
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## Glossary

Blue-Chip Index	<p>A blue-chip index is an index that tracks the shares of well-known and financially stable publicly traded companies known as blue chips. Blue-chip stocks provide investors with consistent returns, making them desirable investments, and are considered a gauge of the relative strength of an industry or economy.</p> <p>Source: <a href="https://www.investopedia.com/terms/b/blue-chip-index.asp">https://www.investopedia.com/terms/b/blue-chip-index.asp</a></p>
Brainstorming	<p>Brainstorming combines a relaxed, informal approach to problem solving with lateral thinking. It encourages people to come up with thoughts and ideas that can, at first, seem a bit crazy. Some of these ideas can be crafted into original, creative solutions to a problem, while others can spark even more ideas. This helps to get people unstuck by "jolting" them out of their normal ways of thinking.</p> <p>Source: <a href="https://www.mindtools.com/acv0de1/brainstorming">https://www.mindtools.com/acv0de1/brainstorming</a></p>
Glass Ceiling	<p>The term glass ceiling refers to a metaphorical invisible barrier that prevents certain individuals from being promoted to managerial- and executive-level positions within an organization or industry. The phrase is commonly used to describe the difficulties faced by women and minorities when trying to move to higher roles in a male-dominated corporate hierarchy. The barriers are most often unwritten, meaning that these individuals are more likely to be restricted from advancing through accepted norms and implicit biases rather than defined corporate policies.</p> <p>Source: <a href="https://www.investopedia.com/terms/g/glass-ceiling.asp">https://www.investopedia.com/terms/g/glass-ceiling.asp</a></p>
Local angle	<p>The local angle comes when a reporter localizes those stories and focuses on the local or regional impact of those events, making them immediately relevant to the local readers.</p> <p>Source: <a href="https://www.thoughtco.com/what-is-a-story-angle-2073756">https://www.thoughtco.com/what-is-a-story-angle-2073756</a></p>
Matrix	<p>A set of <u>related</u> things that <u>affect</u> the way something <u>develops</u> or <u>changes</u>:</p> <p>Source: <a href="https://dictionary.cambridge.org/dictionary/english/matrix">https://dictionary.cambridge.org/dictionary/english/matrix</a></p>
Scapegoat	<p>A person <i>or</i> institution blamed for something that some other person <i>or</i> institution has done.</p> <p>Source: <a href="https://dictionary.cambridge.org/dictionary/english/scapegoat">https://dictionary.cambridge.org/dictionary/english/scapegoat</a></p>

Stakeholder	<p>Individuals or groups with a vested interest in a product or project</p> <p><a href="https://www.mural.co/blog/stakeholder-mapping">https://www.mural.co/blog/stakeholder-mapping</a></p>
Stakeholder mapping	<p>Stakeholder mapping is the process of identifying key stakeholders (...) and understanding their relationships with each other and the project.</p> <p>.</p> <p><a href="https://www.mural.co/blog/stakeholder-mapping">https://www.mural.co/blog/stakeholder-mapping</a></p>
Women on Boards Policy, EU	<p>By 2026, EU companies will need to have 40% of the underrepresented sex among non-executive directors or 33% among all directors.</p> <p>Source:</p> <p><a href="https://ec.europa.eu/commission/presscorner/detail/en/statement_22_7074">https://ec.europa.eu/commission/presscorner/detail/en/statement_22_7074</a></p>

## About this module

Everyday lives of EU citizens are often distant from EU centre of decision.

But EU Cohesion Policy aims to assist in the development of every region and city across the EU. The European Structural and Investment Funds are the main resources for supporting more sectorial policies and are intended to reduce the main inter-regional gaps. They have contributed to the increase of the road networks, environmental programs, investment and innovations, jobs and training.



Figure 81: About this module; Source: EU Image Source

For 2021/ 2027, the EU intends to implement:

- a smarter Europe—innovative and smart economic transformation;
- a greener, low carbon Europe;
- a more connected Europe—mobility and regional ICT connectivity;
- a more social Europe—implementing the European Pillar of Social Rights;
- a Europe closer to citizens—sustainable and integrated development of urban, rural and coastal areas through local initiatives.

In this module, you will learn how to find interesting local angles for stories on EU matters, especially the EU's Cohesion Policy and the way they impact peoples' lives. A few examples of the EU's Cohesion Policy will develop your awareness of the influence that can be shown through local stories.

How does a greener Europe impact the economic transformation of a particular industrial sector? The "A European Green Deal" promotes a series of actions such as NextGenerationEU, NextGenerationEU green bonds or

Recovery and Resilience Facility, among others, that financially support these energy new standards.

How has innovation and smart economic transformation been achieved? How are the funds invested and what are the results seen by locals? The project and funding of "A Europe fit for the digital age" intends this to be the EU 's "Digital Decade", by transforming work for people and companies, and also through this initiative, to build a "climate-neutral Europe by 2050".

By learning local news angles and sources, you will be able to identify newsworthiness in a matrix, in which the global prevails.

Tasks and exercises will help you to achieve the goal of telling local stories by finding good, specialised sources, gathering and interpreting data and providing a critical approach. You will also learn to tell these stories in interesting formats.

## Introduction to the story of this module

Consider this:

You are a young reporter beginning your internship at a regional TV newsroom. You wish to propose a report that addresses the local debate on EU Cohesion Policies that will appeal to both your editor and the audiences from your region.

In this module, you need to collect information from EU Cohesion Policies websites and funds in order to understand the “[big picture](#)”. From raw information, select important topics to make a context for your story. For instance, how measures for a [greener Europe](#) are planned across time and regions. Afterwards, you need to find an angle on how these policies really impact your region.

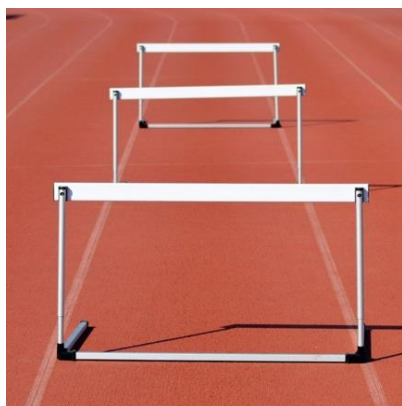
You know that you can write a strong story about green policies but not about the impact on local stakeholders. For that, you must use sources from your region (institutional, testimonial, or other) (Sigal, 1986; Franklin, 1998) that allow you to cross-check information from a global context to regional perceptions. All your work is developed according to the journalistic routine of canvassing for and checking information.



Figure 82: Introduction; Source: Unsplash

By the end of these tasks, you should be able to convince your editors that you can deal with harsh EU matters in a more community related manner.

### EU countries: ‘far far away’ from Brussels?



Scapegoat and a means to score political points: How national politicians use the EU

You are aware that national politicians across the EU sometimes blame the European Commission’s political decisions for all their national and local problems. You are already familiar with the [deviousness](#) of strategic and politicised communication. Biased discourse often increases the gap between citizens and the EU, because when central measures are unpopular the blame game is easier to play.

Figure 83: Documenting on local angle issues; Source: Unsplash

You understand that at a local level the distance between central EU politicians and regions has increased for several reasons:

- Disparity on economic and social levels
- The lack of information
- Impact of lobbying on central decisions

### Exercise 1:

By now you can find examples of news reports that show the national politicians playing the blame-the-EU-game.

Find other examples of news reports of citizens [critical point of view](#) of EU policies.

Example: Portugal Cohesion funds for recovery of the Covid 19 pandemics were approved under the Recovery and Resilience Program ([RRP](#)). However, citizens, companies and corporative institutions are critical of the way these PRR funds will impact on particular sectors or regions.

Compile a dossier of press news concerning EU Cohesion Policies, The RRP and your region.

You can use search buttons in local media outlets using keywords to find specialised information for your dossier.

### The EU is just around the corner

Sometimes you think that the EU is “the land far far away”. But by surfing the European Youth Portal, you also know that many of its policies impact positively in everyday life. Some of the measures may seem very distant, such as the funding programs and the way they are delivered. Other measures are more evident such the “A European Green Deal”.



Figure 84: The EU is just around the corner;  
Source: Pixabay

Here, you find a video on a concrete Cohesion Policy project: ‘[Gedempte Zuiderdokken](#)’ (‘filled-in southern docks’) in Antwerp, Belgium. It’s about a huge open space that used to be a parking lot. The parking spaces are now under the ground, a park will be built on the surface.

### Exercise 2:

Find a specific EU program that impacts directly in your life.

Example:

Sustainable urban development is one of the cornerstones of European Cohesion policies. However, recent growth in main cities bring challenges for citizens and discontent with the political local response.

Construct a checklist with pros and cons with meaningful words like wealth, gentrification, housing, employment, etc.

Afterwards, build an ax and drag the words that impact positively on the left side and the ones that impact negatively on the right side on free circulation topic in your region.

## See what I mean?



Figure 85: See what I mean?; Source EU image Source

EU Cohesion Policies can be straightforward at the local level. You're familiar with programs such as Erasmus and tools like the Eduroam protocol. But other excellent examples of a positive general impact do exist. As you are aware, during the COVID-19 pandemic, EU citizens benefited from a joint [vaccines](#) purchase and distribution policy for all member states.

### Exercise 3:

From accessible news, identify terms related with [positive and negative impacts](#) of the COVID-19 pandemic in your region. Visualise the word trends on a [word cloud](#) using a freeware tool.

## The angle of your story: An example of how it can go wrong. The 'Women on Boards' story

### Introduction

You're a journalist working for a regional newspaper, and you read [a press release](#) about the EU 'Women on Boards' project that aims at boosting the gender balance in publicly listed companies. That might be a relevant story to cover when you find a local angle that may interest your readers. It is after all a story on empowerment and giving equal chances to everybody. Moreover, the programme shows the impact of EU policy on local societies. So, you decide to make a story on the topic.

In this example, we elaborate on how you might recognize the way you often work when getting an assignment: you start googling. We'll show you how you might lose a lot of time when you look for information, stats and so on, without having any direction.

You then get a lot of information but because the focus may seem awry at any moment, you must reconsider angles and approaches all the time.

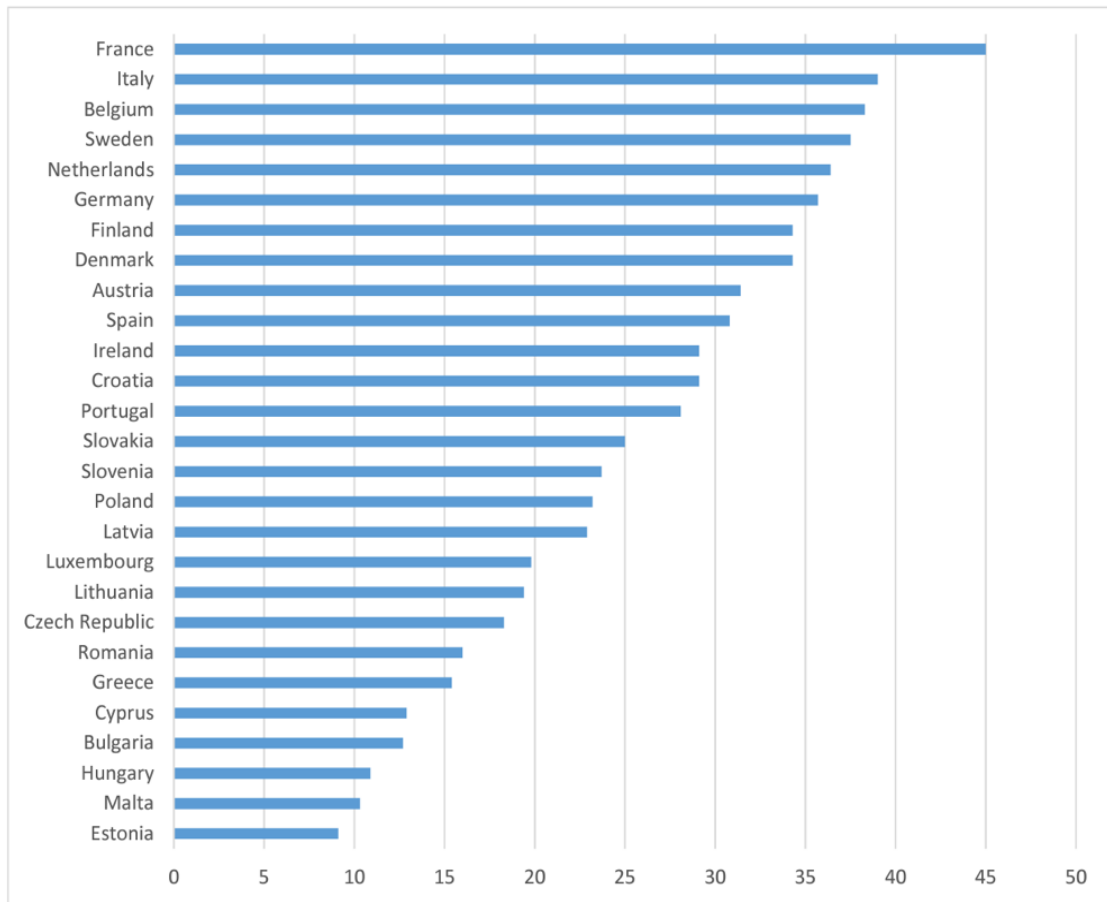
Therefore, on the next pages, you will learn a technique on how to avoid wasting time and starting a well-prepared internet search.

### Researching and thinking of angles

So, you start googling and find information on the website of the European Parliament: a press release with links to more information.

On the website, next to the press release, you can also find links to the text of the [provisional agreement](#) and a [study](#) on Women on Board Policies (WoBP) in EU member states, including some graphs:





Source: The Gender Statistics Database (GSD) of the European Institute for Gender Equality (EIGE), last update 25.5.2021.

Figure 86: Women's Share in Percent Among Board Members of the Companies Listed in the Primary Blue-chip Index of EU-27 Countries in 2021

The graph shows Women's Share in Percent Among Board Members of the Companies Listed in the Primary Blue-chip Index of EU-27 Countries in 2021. You notice big differences in the EU countries. How is your country doing?

In the caption a 'Blue-chip Index' is mentioned. What does this mean? Look it up: Blue-chip Index. What did you find?

[Click for a definition.](#)



And the other graph you found:

Country	Gender quota law	Gender diversity recommendation in CGC	Disclosure requirement about board diversity
Austria	✓	✓	✓
Belgium	✓	✓	✓
Bulgaria			✓
Croatia			✓
Cyprus			✓
Czech Republic			✓
Denmark		✓	✓
Estonia			✓
Finland		✓	✓

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Women on Board Policies in Member States and the

Effects on Corporate Governance

Country	Gender quota law	Gender diversity recommendation in CGC	Disclosure requirement about board diversity
France	✓	✓	✓
Germany	✓	✓	✓
Greece	✓	✓	✓
Hungary			✓
Ireland		✓	✓
Italy	✓	✓	✓
Latvia		✓	✓
Lithuania			✓
Luxembourg		✓	✓
Malta			✓
Netherlands	✓	✓	✓
Poland		✓	✓
Portugal	✓	✓	✓
Romania		✓	✓
Slovakia			✓
Slovenia		✓	✓
Spain	✓	✓	✓
Sweden		✓	✓

Source: Based on Arndt & Wrohlich (2019), own additions.

Figure 87: Women on Board Policies in the EU Member States

The graph shows whether EU member states already have some kind of Women on Boards Policy. What about your country?

**Too academic. Doesn't engage readers**

Looking at the graphs, can you think about writing a story comparing your country's situation with other EU Member States? Is your country doing better or not than most others? Is the gender ratio of board members in general more or less than in other EU countries? And is that because of gender quota or the absence of them?

These are interesting questions (and you will have to ask a lot more). But you could ask a spokesperson of a feminist organisation to get some background information and insights on the situation in your country.

But that story might turn out to be uninteresting because it would develop into being a comparison of legislation across Member States with numbers and stats, new measures, possible sanctions and so on. The story might prove to be too academic.

So, let's skip that idea and look further.

## Don't get whiny!

Searching further on the internet, you come across [an article](#) on the website of the Organisation for Economic Co-operation and Development (OECD) with data about women on boards. OECD is a well-known and trustworthy organisation, so you are inclined to use the data.

There is also a graph showing that the 'glass ceiling' still exists. Women do get higher in the hierarchy of large companies, but seldom reach the top or 'executive' as it is called.

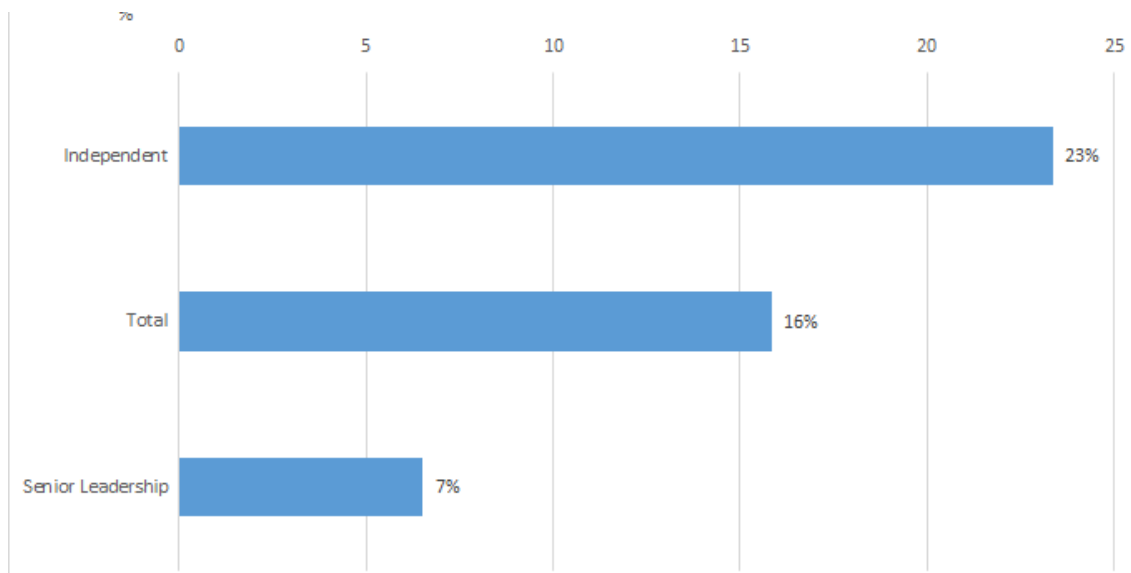


Figure 88: Percentage of female board members by job category; Source: [OECD](#)

Could you write a story on that topic, from a regional or local point of view? You would then write a general story and show that there is still a lot of work to be done. But then you should consider that the EU is now launching a new policy on Women on Boards aimed at breaking the glass ceiling. Your story might become a 'whiny' story, with a negative approach and thus miss the point of the EU initiative.

Maybe there's already been a lot written about the topic? And since the WoBP has not been launched, the story might become too hypothetical: "Will the WoBP help break through the glass ceiling?"

Nobody knows the answer as only time will tell.

## Get local!

In the study there is a chapter on 'Effects of WoBP' (2021). On [page 44](#) you can read:

Taken together, many studies indicate that appointing more women to corporate boards will not only improve the financial performance of companies, but will also lead them to behave in ways that are beneficial for stakeholders and for society as a whole. Hundreds, if not thousands of studies are being published that highlight some kind of beneficial result emanating from women's representation on corporate boards.

That might be an interesting approach: it's a good thing that women are on corporate boards, for the company, the stakeholders and for society. Great! The question is: how can you make a story out of this information that fits into your regional newspaper?

You could search the websites of publicly listed companies in your country and check the ratio of men and women among the members of the board. Whenever you find a woman, you could contact them and talk to them about their experiences.

Or you could talk to male board members asking them about how the presence of women on the board has affected the cooperation or the atmosphere in the company, ...

### **Overwhelmed**

But that's still not a real local angle. Only when there are the headquarters or a major branch of a publicly listed company in your region, is the story mentioned above possible.

So, you keep googling, searching and finding general reports, stats, data and so on. After an hour you are overwhelmed with all that information and still have no clue about a local story you could write about. You decide that you must think differently.

### **What about other strong women? You're finally getting there.**

So, you think:

Women who sit on corporate boards are strong women, who have an interesting career, and they certainly have a business degree or one in economics, or sciences, or... But other women don't have that at all. As a result of events—for instance childbirth and subsequently being a mother and home-keeper—during their life-courses, they're unable to work, pursue higher studies or build a challenging career.

You either know there are organisations that empower women or you ask your colleagues if they know about them. You could make a portrayal of a few women who such an organisation have supported.

To find these organisations you should explore [Kohesio](#), a website with information on all kinds of projects that the EU supports.

Wow! It took a while to reach this angle for your story. All the research you've been doing was interesting, but finding a suitable angle wasn't easy because you didn't look for it in a structural way. That's something you will learn in the 'Stakeholder mapping technique'.

While you were doing your research, you probably thought of other angles as well. You might find some of them in the next exercise.

#### **Exercise 4 – Evaluating Possible Story Angles**

Do you think the ideas for stories below provide suitable angles for a local story about women on corporate boards?

Why? Why not? Take notes on these ideas for story angles.

Use a maximum of 20 minutes to work on this exercise.

- Story Angle 1: Interview with a professor who is an expert in gender studies about breaking the glass ceiling.
- Story Angle 2: Reportage of “a day in the life” of a female CEO from a nationally well-known company.
- Story Angle 3: Interview with employees—in the biggest company in your city—about their female boss.
- Story Angle 4: Reportage on a national feminist organisation that does research on gender and gender equality.
- Story Angle 5: Interview with a female politician of the regional council about the implementation of the EU’s WoBP.

The solution to this exercise can be found at the very end of this module.

#### **Brainstorming and Stakeholder mapping**

As you found in the first exercise, a random internet search rarely results in a suitable story angle. Indeed, a story angle is difficult to find in the short term, or it’s not suitable for the target group or just not that interesting. Or you only find angles that have been used many times before.

So, you need a suitable angle, but as always you don't have much time. Moreover, you want to offer your audience an interesting and surprising story. To achieve that, you can use a brainstorming technique: [stakeholder mapping](#).

#### **Many diverse stakeholders**

In a business, for example, stakeholders are the employees, customers, neighbours, shareholders, suppliers, and so on. They have a vested interest in business in one form or another. The employees need the business to pay their wages, while the company needs the employees to be able to produce its products or services.

Local residents are also stakeholders because they don't want nearby businesses polluting the environment such as excess and continuous noise; air pollution (from many vehicles; coal and gas fired manufacturing processes; noxious smells), and chemical discharges into nearby water bodies.

#### **Elaborate example. The story of the sports hall**

In the context of a journalistic story, you can distinguish stakeholders.

Stakeholders are people who have a vested interest in the subject of your story. They are the people whom you allow to have a voice and whom you need to give the opportunity to reply.

### **Exercise 5:**

Suppose a municipal council decides to build a new sports hall on the edge of a nature reserve with important biodiversity. Who are the stakeholders there? Take some time to reflect and make a list.

Use a maximum of 15 minutes to work on this exercise.

The solution to this exercise can be found at the very end of this module.

### **Post-its – paper or digital**

To identify all the stakeholders in a journalistic piece, you first map them out. You have already, in the previous section, made a list of all the stakeholders. Post-its are fantastic for visualising the relationships between stakeholders and the story's subject, because you can move them around easily.

First, on a large sheet of paper (size A0, the larger the better) draw a matrix of axes X and Y labelling them as Influence (axis X) and Interest (axis Y)—Interest indicates stakeholders' likely concerns, whilst Influence indicates their ability to resist or promote changes.

Secondly, on each post-it you write a single stakeholder from the list.

Thirdly, when you have completed transferring the list, you place the post-its on the 'stakeholder matrix'.

### **Discover great stories**

The stakeholder map enables you to have a clear overview of all stakeholders and which of them might be interesting for your story.

For example

- How do nearby restaurants and cafés view the arrival of the sports hall, which will have its own restaurant?
- Do people who regularly go for walks in the nature reserve fear a negative impact on their hobby?
- How do the municipality's sports clubs view the new infrastructure: grounds, showers, equipment, ...?
- Do residents of the municipality who don't live near the sports hall see a variation in policy priorities in the municipality?
- Are nature conservationists angry, worried, or frustrated about the plans? Did the municipal council consult with them?

Or take a step back and choose a broader environmental or political angle

- Have all planning procedures been followed?
- Which parties have a strong interest and are influential in the decision-making project? Why did they choose to build a new sports hall in the first place? And why on that exact spot? Maybe the old hall could be renovated? Why not? And so on.

### **Underexposed aspects**

You can also connect several stakeholders with each other

- Did the municipal administration consult with the sports clubs?
- Did it seek advice from conservationists?
- Did it do a survey in the municipality?
- Do sports clubs and opposition think the arrival of a new sports hall is necessary?

The great advantage of this brainstorming technique is that it goes fast, you can do it on your own or with colleagues and you get ideas for stories really quickly.

Above all, you get a clear overview of the influential players in your story and those with less influence. You will discover underexposed aspects, which offer great prospects for strong stories.

Once you have finished your brainstorming and you found an interesting and suitable angle, the research begins. But unlike the example of the Women on Boards, you can start your research with a much more focussed manner.

### **Brainstorming exercise: Ban of fossil fuel cars from 2035**

[The EU regulation states](#) that from 2035 the sale of new petrol and diesel cars in the European Union will be prohibited—in order to speed up the switch to electric vehicles and combat climate change.

The rules will require that by 2035 carmakers must achieve a 100% cut in carbon dioxide (CO<sub>2</sub>) emissions from new cars sold, which would make it impossible to sell new fossil fuel-powered vehicles in the EU.

#### **Exercise 6:**

You are a journalist working for a regional newspaper and you want to write a piece on the petrol and diesel cars ban that is interesting for your readers.

Take notes: Do a brainstorm to create either a post-it or a digital stakeholders map on a regional level (as you learnt in the previous lesson).

First, compile a list of stakeholders and then compare your list to one below and amend if needed.

The solution to this exercise can be found at the very end of this module.

**Exercise 7:**

Now create an Interest and Influence matrix and locate each stakeholder in what you think is their correct position based on the following information:

- The classic cars fans, the nature conservationist, the city council and the bicycle salesman are or may be highly affected by the ban on fossil fuel (high level interest), but they can't do much about it but adapt (low level influence).
- A city council could try to get more support from the government and have some influence there (low to medium level influence).
- Climate ministers are highly affected by the regulation (high level interest). They will have to adapt their future policy to the regulation. A national minister has more influence than a regional minister, but probably not as much as a Member of European Parliament who negotiated on the regulation's criteria.
- A car brand is a powerful company with a large economic impact and thus influences the decision-making process (high level influence), certainly when several brands work together.

Use a maximum of 20 minutes to work on this exercise.



### **Exercise 8:**

Below, you will find 12 possible Story Angles—each accompanied by an Evaluation of Story Angle Suitability.

Do you consider any of the story angles suggested below are suitable for your local newspaper? Answer them with YES or NO and explain your decision.

- Angle 1: Interview with independent gas station owners on their future: income, employees, investments done, ...
- Angle 2: Interview with the CEO of a car construction company on the future of the brand's cars.
- Angle 3: A national climate minister on their position on the new regulation and how it affects the country.
- Angle 4: A story on owners of an electric car: advantages, how happy they are (or not) with the car, ...
- Angle 5: An interview with a politician from the city council on measures to be taken: investing in multiple charging stations, ...
- Angle 6: An interview with a nature conservationist talking about the effect of cars' emissions in a nature reserve near to the ring road of a city.
- Angle 7: An interview with a classic cars fan club about the impact of the regulation on their hobby.
- Angle 8: Interview with an expert on e-fuels/synthetic fuels at the university in a city nearby on the advantages and disadvantages of e-fuels.
- Angle 9: An interview with an MEP of your country about the new regulation and its impact.
- Angle 10: An interview with the managing director of a taxi company on the impact of the regulation on their company?
- Angle 11: An interview with a regional climate minister on their position on the regulation?

Angle 12: An interview with the managing director of a fuel distributor in a city nearby about the future of the company.

Use a maximum of 25 minutes to work on this exercise. The solution to this exercise can be found at the very end of this module.

After you decide upon which story angle is most suitable (the story scoring closest to 10 on the Likert Scale), you can start researching that story angle.

The stakeholder mapping technique may look very time consuming. And indeed, it is. You will need to budget about an hour to (a) make the list of stakeholders and (b) place them in the matrix. But that time investment pays off because your research will be much more focused and less arbitrary and consequently you will compose much better journalistic pieces.

## **Conclusion**

Well done!

You have successfully worked your way through Module 7. This course has helped you to target local issues in a global cohesion policy. You should have gained the skills to make stories on how the EU Cohesion Policy is relevant in peoples' everyday lives. You now know how to gather data and information, which are generated by central decisions and select and prioritise what is meaningful for your region.

Furthermore, you know how citizens of your region perceive policies' impacts at a local level. Module 7 provided the means to find interesting stories, based on sources, institutions and data that manage the problem of the distance between central decision-making and EU citizens in their own regions.

We would like to recommend further literature to you:

### **“Further literature and contact information”**

#### **Academic literature:**

Sigal, L.V. (1986). Sources make the News. In Manoffand, R.K. & Schudson, M. (eds.), *Reading the News*, (1, 9-37). Pantheon.

Franklin, B. (1998). *Local Journalism and Local Media. Making the Local News*. Routledge

Gulyás, Á., & Baines, D. (Eds.). (2020). *The Routledge companion to local media and journalism*. Routledge.

Leupold, A., Klinger, U., & Jarren, O. (2018). Imagining the city: How local journalism depicts social cohesion. *Journalism Studies*, 19(7), 960-982.

Finneman, T., & Thomas, R. J. (2021). You Had to be Reporting Constantly: COVID-19's impact on US weekly newspapers' journalistic routines. *Newspaper Research Journal*, 42(3), 330-345.

Boesman, J., Costera Meijer, I., & Kuipers, M. (2021). We Would Never Have Made That Story: How Public-Powered Stories Challenge Local Journalists' Ideas of Newsworthiness. *News Values from an Audience Perspective*, 141-163.

Konohovs, A., & Lecheler, S. (2012). Latvian journalism and the European union: a Brussels and Riga perspective. *Media Transformations/Mediju Transformācijas*, 8.

#### **Contact information**

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20 European journalism schools are collaborating. All schools are members of the European Journalism Training Association (EJTA). Moreover, he is the inspirer of the international Invisible cities project, which since 2019 has been using a constructive approach to make the voices of people heard who never get the chance to speak up.

**Paulo Frias** is Lecturer at the Faculty of Arts and Humanities of University of Porto. His main research interests are related with online journalism, social media and journalism training, and is responsible for several theoretical and laboratorial courses in Bachelor and Master Degrees. Within these topics, he published several communications and book chapters. He has participated in several national and international projects related with journalism and journalism training. Paulo Frias is also the Director of the Bachelor in Communication Sciences (journalism or strategic communication) at U.Porto. He also leads the academic online newspaper JPN-JornalismoPortoNet, a digital native platform with almost 20 years recognized by the Portuguese Journalism regulator and based in the journalistic work by the students from the Bachelor and Master in Communication Sciences at U.Porto. Paulo Frias is a researcher of CITCEM. He supervised in the last 15 years several PhD and Master dissertations, and he participated in MA and PhD juries in Portugal and in Spain.

**Helena Lima** is Associate Professor at Faculty of Arts and Humanities of University of Porto. Her main research field tackles newspapers and the way they relate to their audiences, structural transformations and news contents and formats. She participated in several research projects and she is a published author of several books and chapters and publications in peer review journals. Health literacy and communication is another area of research and she is the coordinator of LACLIS, a creative lab of University of Porto for this field of studies in articulation with civil society. Helena Lima is researcher of CITCEM, Professor at Faculty of Arts and Humanities of University of Porto and she has been in the scientific committees of conferences and journals. As well as in the organization of academic events. She has been supervisor of several PhD and Master dissertations. Helena is a long career teacher on journalism subjects, either in theoretic and laboratorial classes.

## **Solutions for Module 7:**

### **Exercise 4:**

#### Evaluation of Story Angle Suitability

- Story Angle 1: NO. This story is beyond the average local readers' experience and might become a bit 'academic'.
- Story Angle 2: YES: it's a big company, and as the WoBP is an EU initiative, it's possible to use the story. Also, the company is well known in the country.
- Story Angle 3: YES: a suitable angle. It's one of the largest and well-known companies in your region. And the boss is the first female boss at the company.
- Story Angle 4: NO: It's an interesting idea but NO because your paper is a regional one and the readers don't prefer national issues.
- Story Angle 5: YES: As the female politician is a regional council member, she is involved in the implementation of the regulation and can talk about the steps that will be taken.

### **Exercise 5:**

#### List of stakeholders:

- municipal council
- opposition parties
- local residents
- association of nature conservationists
- contractor to build the sports hall
- sports clubs to use the hall
- sports clubs that won't use the hall, but might need new infrastructure as well
- inhabitants of the city who go for walks in the nature reserve
- inhabitants of the city who don't live anywhere near the nature reserve / planned sports hall
- local or regional police
- regional authorities

The list is not exhaustive.

### **Exercise 6:**

#### List of stakeholders:

- Classic cars fan club
- MEP from your country, expert on the topic

- Bicycle salesman
- Regional climate minister
- Car brand
- National climate minister
- National nature conservationist organization
- City council

### **Exercise 8:**

- Angle 1: YES. It's definitely a local story, the reader might even know the owner.
- Angle 2: NO. The story is indeed distant from your media outlet's average reader. Not suitable.
- Angle 3: NO. Indeed, this story is distant from your media outlet's average reader.
- Angle 4: YES. It's indeed a story about people who live close to the reader. The car owner will be driving on streets the reader might recognize in the photos in the article.
- Angle 5: YES. 2035 might seem too distant, but the audience is interested as to how the city and municipality councils will plan to prepare for the switch to electric cars.
- Angle 6: YES. The reader might know the ring road and the nature reserve from personal experience. Or finds out that the nature reserve exists.
- Angle 7: YES. It would be a local story on people who like to renovate old cars and drive them around. The reader might recognize the hobby, the people, and the club.
- Angle 8: YES. The reader probably knows the university, family members might study there.
- Angle 9: YES/NO. When the MEP comes from your region, then it's plausible. Otherwise, the story is too distant from the reader..
- Angle 10: YES. The reader might indeed know the company, maybe already took a taxi. And the regulation will affect the company.
- Angle 11: YES. A regional climate minister might have not too much influence on the regulation but will be involved in its implementation.
- Angle 12: YES. Indeed. Readers might know the company, might even be a client there.

# Module 8 – EU & Reporting on Economic Issues

## Basic Information

Module number	8
Module title	EU & reporting on economic issues
Duration/study load	8 hours
Keywords	Corruption; Economic journalism; Economic news values; Efficiency; ESSF Formula; Fairness; Regional disparities; (Regional) economics; Stability; Sustainability
Learning outcomes	<p>At the end of the module, you should be able...</p> <p>...to apply economic thinking in daily journalistic work, especially when it comes to issues dealing with EU Cohesion Policy</p> <p>...to explain concepts of regional economics</p> <p>...to recall and summarise the specific characteristics and requirements of economic journalism</p> <p>...to recall and explain the ESSF Formula</p>
Description	<p>Module 8 provides you with key knowledge about reporting on economic issues by introducing you to the basics of (regional) economics, the requirements of economic journalism and the ESSF Formula as a framework for covering EU Cohesion Policy.</p> <p>Module 8 starts with an introduction to regional economics, proceeds to specifics of economic journalism, in particular with respect to economic news values as opposed to traditional news values, and then ends with the presentation of the ESSF Formula that translates the economic concept of social welfare into four journalistic categories: efficiency, stability, sustainability, and fairness.</p> <p>Module 8 is mostly about knowledge acquisition, but knowledge is presented in an illustrative manner and interrupted from time-to-time with interactive exercises.</p>
Sequentiality	Module 8 is interlinked with Module 9. In Module 9, you will deal with the practical approach of the theoretical insights gained in Module 8. Thus, work on Module 8 should be completed before starting on Module 9.
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## Glossary

Agglomeration	<p>An <b>agglomeration</b> is a large group of many different things collected or brought together.</p> <p>Source: <u>Cambridge Dictionary, n.d.</u></p>
Agglomeration economy	<p>An <b>agglomeration economy</b> is an external economy of scale brought about by the massing of a population in one place. As the population of a town or city increases, a more complex infrastructure is possible and a greater division of labour can be achieved than in a smaller settlement. The larger the settlement, the more likely it is to have a full range of transport, shopping, cultural and health facilities.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 9</u></p>
(Aggregate) demand	<p><b>Demand</b> is the amount of factors of production or their products desired at a particular price. Alternatively, it is the total expenditure on a good or service. <b>Aggregate demand</b>, in turn, is the total amount of national planned expenditure by firms, households, governments and other nations at each price or income level.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, pp. 9–10, 99</u></p>
(Aggregate) supply	<p><b>Aggregate supply</b> is the total output which all the producers of an economy are willing to <b>supply</b> at each price level, or alternatively, the total output as a function of the amount of labour.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 10</u></p>
Asymmetric information	<p><b>Asymmetric information</b> is information possessed by one side of a market only. If, for example, buyers but not sellers have relevant information, they will be at an advantage. In labour markets, employers usually know more about the present and future financial state of their firms than trade unions and thereby have a bargaining advantage in wage negotiations.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 18</u></p>
Bribery	<p><b>Bribery</b> is an illegal attempt to make someone, especially someone in a position of authority, do something for you by giving the person money, presents, or something else that they want.</p> <p>Source: <u>Cambridge Dictionary, n.d.</u></p>



Capacity	<p><b>Capacity</b> refers to the maximum output that a firm or an economy can produce from its existing supply of factors of production. Thus, to increase its <b>capacity</b>, a firm must enlarge its labour force or its capital stock.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 51</u></p>
Corruption	<p><b>Corruption</b> is a dishonest or illegal behaviour involving a person in a position of power, for example, accepting money for doing something illegal or immoral. <b>Corruption</b> includes the abuse of entrusted power for private gain. <b>Corruption</b> erodes trust, weakens democracy, hampers economic development and further exacerbates inequality, poverty, social division and the environmental crisis.</p> <p>Source: <u>Cambridge Dictionary, n.d.</u>; <u>Transparency International, n.d.</u></p>
Deadweight loss	<p><b>Deadweight loss</b> can be a measure of lost economic efficiency when the socially optimal quantity of a good or a service is not produced. The concept of <b>deadweight loss</b> is crucial to much of welfare economics, for instance, the analysis of the effects of a monopoly, of taxes and of tariffs. An example of a <b>deadweight loss</b> is a loss that occurs when a government raises taxes in order to get more money, but then loses money as a result. For example, a company that goes bankrupt because of increased taxes will stop paying taxes completely. Eventually, these forgone taxes are lost and cannot be used for the society's benefit. Thus, they represent a <b>deadweight loss</b> in terms of social welfare.</p> <p>Source: <u>Cambridge Dictionary, n.d.</u>; <u>Routledge Dictionary of Economics, 1992, p. 95</u></p>
Demography	<p><b>Demography</b> is the study of the size and composition of human populations, particularly births, deaths and migration. Both historical recording and projections of future populations are calculated to provide the basis for economic and social planning.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 101</u></p>

<p>(Economic) efficiency</p>	<p><b>Economic efficiency</b> is when all goods and factors of production in an economy are distributed or allocated to their most valuable uses and waste is eliminated or minimised. A system is considered <b>economically efficient</b> if the factors of production are used at a level at or near their capacity.</p> <p>In contrast, a system is considered economically inefficient if available factors are not used to their capacity. Wasted resources and deadweight losses may cause economic inefficiencies.</p> <p><b>Efficiency</b>, as part of the ESSF Formula, means there shall be no waste of economic resources, the more income and growth the better, all else being equal.</p> <p>Source: <u>Investopedia, 2020; Müller, 2023</u></p>
<p>Economic gravity model</p>	<p>An <b>economic gravity model</b> is a method of predicting the amount of interaction between two places. It asserts that interaction is directly related to the product of the two populations and inversely to the distance between the places concerned. Distance can be measured in various ways, including route miles and transport cost. More sophisticated models take into account the characteristics of the populations, weighting them accordingly.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 173</u></p>
<p>(Economic) growth</p>	<p><b>Economic growth</b> is the growth in the total, or per capita, output of an economy, often measured by an increase in real gross national product, and caused by an increase in the supply of factors of production or their productivity. Ecologists and others concerned about the scarcity of natural resources have advocated zero <b>economic growth</b> rates as appropriate for the late twentieth century.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 118</u></p>
<p>Economic integration</p>	<p><b>Economic integration</b> is the joining together of economic activities, especially the trade of several countries. This can take different forms, including free trade areas, customs unions, common markets and federations of national economies. Different forms of integration can be distinguished by the extent to which individual national governments retain independence in decision-making.</p> <p>See also <b>market integration</b></p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 118</u></p>
<p>(Economic) resource</p>	<p>see <b>Factor of production</b></p>

<p>(Economic) waste</p>	<p><b>Waste</b> is the undesired costs resulting from a particular economic activity. <b>Waste</b> as well refers to transactions which do not create wealth, for instance, rent-seeking behaviour. <b>Waste</b> can also occur because of the peculiar nature of certain types of economic organisation, for instance, barter economies <b>waste</b> time through the need of buyers and sellers to search for each other; competitive economies are wasteful in needing advertising and other selling expenditures.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 438</u></p>
<p>Economy of scale</p>	<p><b>Economy of scale</b> is a reduction in long-run average cost as a result of an expansion in output which leads to increasing returns to scale. To measure a purely scale effect, it is necessary to make some strict assumptions: that, as output changes, there is no change in techniques used, factor prices are constant and the same degree of vertical integration holds as output changes. <b>Scale economies</b> may arise in many aspects of a firm's operations – its financing, marketing and production. An excellent example of a <b>scale economy</b> is the spreading of a fixed cost over a larger output, for instance, typesetting costs spread over an increased print run.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, pp. 123–124</u></p>
<p>Embezzlement</p>	<p><b>Embezzlement</b> is the crime of secretly taking money that is in your care or that belongs to an organisation or business you work for.</p> <p>Source: <u>Cambridge Dictionary, n.d.</u></p>
<p>ESSF Formula</p>	<p>The <b>ESSF Formula</b> puts forward an innovative system of economic news values that journalists can employ to pursue independent reporting on economic policy, business and finance. Translating the economic concept of welfare into journalistic categories, economic journalism should be guided by the <b>ESSF Formula</b> – efficiency, stability, sustainability, and fairness.</p> <p>Source: <u>Müller, 2023</u></p>

<p>European single market</p>	<p>The <b>European single market</b>, sometimes also called the internal market, is one of the cornerstones of the European Union (EU). It refers to the free movement of people, goods, services and capital within the EU, the so-called “four freedoms” laid down in the Treaty of Rome. This has been achieved by eliminating barriers and simplifying existing rules so that everyone in the EU can profit from direct access to all other member states.</p> <p>The enabling instrument for the single market was the Single European Act (SEA), which came into force in July 1987. Among other things it called for:</p> <ul style="list-style-type: none"> <li>● extending the powers of the Community in some policy areas (social policy, research, environment);</li> <li>● gradually establishing the <b>European single market</b> over a period up to the end of 1992, by means of a vast legislative programme involving the adoption of hundreds of directives and regulations; and</li> <li>● making more frequent use of majority voting in the Council of Ministers.</li> </ul> <p>EU policies in the areas of transport, competition, financial services and consumer protection underpin the <b>European single market</b>.</p> <p>Source: <u>Eurostat Statistics Explained, 2019</u></p>
<p>Eurosystem</p>	<p>The <b>Eurosystem</b> is the system of central banks in the euro area responsible for implementing the single monetary policy and includes the European Central Bank (ECB) and the national central banks of the European Union countries that have adopted the euro.</p> <p>Source: <u>European Central Bank (ECB), n.d.</u></p>
<p>Eurozone / euro area</p>	<p>The <b>eurozone</b>, also known as <b>euro area</b>, consists of those European Union (EU) member states which have adopted the euro as their single currency.</p> <p>At present, the <b>eurozone</b> comprises 20 member states: Austria, Belgium, Croatia, Cyprus, Estonia, Finland, France, Germany, Greece, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Portugal, Slovakia, Slovenia, and Spain.</p> <p>Until the end of 2001 the euro existed as book money only (cheque, transfer, payment by card) and its use was voluntary (no compulsion – no prohibition). Euro coins and notes were introduced on 1 January 2002, when use of the euro became compulsory and national currencies were progressively withdrawn.</p> <p>Source: <u>Eurostat Statistics Explained, 2023</u></p>

Export	<p><b>Export</b> is the sale to a resident of another country of a good or service which is domestically produced. <b>Exports</b> net of imports are included in the gross domestic product. The volume of a country's <b>exports</b> has many determinants, including the exchange rate, marketing methods, delivery times, product design and the extent of government subsidization, especially the guarantee of <b>export</b> finance so that firms will not be discouraged from <b>exporting</b> by the risk of buyers' defaulting.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 142</u></p>
Extortion	<p><b>Extortion</b> is the act of getting something, especially money, by force or threats.</p> <p>Source: <u>Cambridge Dictionary, n.d.</u></p>
Factor of production	<p>A <b>factor of production</b>, also called (economic) resource, is an input which produces a good or service. Before the eighteenth century it was common to classify all factors as either land and labour; later, capital and the entrepreneur were considered as separate <b>factors of production</b>. In many modern economics models, only labour and capital are included as <b>factors of production</b>. Capital, in this case, is a broad term that can describe anything that confers value or benefit to its owners, such as a factory and its machinery, intellectual property like patents, or the financial assets of a business or an individual.</p> <p>Source: <u>Hargrave, 2022; Routledge Dictionary of Economics, 1992, p. 144</u></p>
Fairness	<p><b>Fairness</b>, as part of the ESSF Formula, rules out exploitation and overreach of any kind resulting from the asymmetric distribution of wealth, power, and information.</p> <p>Source: <u>Müller, 2023</u></p>
Favouritism	<p><b>Favouritism</b> is the unfair support shown to one person or group, especially by someone in authority.</p> <p>Source: <u>Cambridge Dictionary, n.d.</u></p>
“Four freedoms”	<p>The European single market operates on the basis of the “<b>four freedoms</b>”: the free movement of goods, services, capital and people.</p> <p>Source: <u>European Parliament, 2022</u></p>

<p>Fraud</p>	<p><b>Fraud</b> refers to an act of deceitful accounting or misappropriation of funds. Simply put, <b>fraud</b> is the crime of getting money by deceiving people. The intentional action results in the victim suffering a loss and/or the perpetrator achieving a gain. <b>Fraud</b> is a criminal offence. In short: <b>Fraud</b> is a deliberate act of deception intended for personal gain or to cause a loss to another party.</p> <p>An irregularity is an act which doesn't comply with EU rules and which has a potentially negative impact on EU financial interests, but which may be the result of genuine errors committed both by beneficiaries claiming funds and by the authorities responsible for making payments. If an irregularity is committed deliberately, however, it's <b>fraud</b>.</p> <p>Source: <u>Cambridge Dictionary, n.d.</u>; <u>OLAF – European Anti-Fraud Office, n.d.</u>; <u>Routledge Dictionary of Economics, 1992, p. 158</u></p>
<p>Gravitation</p>	<p><b>Gravitation</b> is the natural attraction that any two masses have for each other. Gravitational effects play a crucial role in the concentration of economic activity within the European Union.</p> <p>Source: <u>Cambridge Dictionary, n.d.</u></p>
<p>Gross domestic product (GDP)</p>	<p><b>Gross domestic product (GDP)</b> is the total output of goods and services produced within a given country in a particular time period. It is equal to the sum of the value added by each industry, net of all inputs, including imported intermediate goods: this is equal to the factor incomes of all persons engaged in domestic production. <b>Gross domestic product</b> together with net property income from abroad, constitutes gross national product.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 175</u></p>
<p>Gross national income (GNI)</p>	<p>Gross National Income (GNI) is the total amount of money earned by a nation's people and businesses. It is used to measure and track a nation's wealth from year to year. The number includes the nation's gross domestic product (GDP) plus the income it receives from overseas sources.</p> <p>Source: <u>Investopedia, 2023</u></p>

Gross national product (GNP)	<p><b>Gross national product (GNP)</b> is an estimate of the total value of all the final products and services turned out in a given period by the means of production owned by a country's residents. <b>GNP</b> is commonly calculated by taking the sum of personal consumption expenditures, private domestic investment, government expenditure, net exports, and any income earned by residents from overseas investments, then subtracting income earned by foreign residents. Net exports represent the difference between what a country exports minus any imports of goods and services.</p> <p><b>GNP</b> is related to another important economic measure called gross domestic product (GDP), which takes into account all output produced within a country's borders regardless of who owns the means of production. <b>GNP</b> starts with GDP, adds residents' investment income from overseas investments, and subtracts foreign residents' investment income earned within a country.</p> <p><b>GNP</b> is used as a crude measure of economic welfare. Its growth can be divided into real growth and growth due to inflation.</p> <p>Source: <a href="#">Investopedia, 2023</a>; <a href="#">Routledge Dictionary of Economics, 1992, p. 175</a></p>
Import	<p><b>Import</b> is the purchase of a good or a service which has been produced by another country. Exports net of <b>imports</b> are included in calculating a country's gross domestic product.</p> <p>Source: <a href="#">Routledge Dictionary of Economics, 1992, p. 189</a></p>
Market access	<p><b>Market access</b> refers to the ability of a company or country to sell goods and services across borders. <b>Market access</b> can be used to refer to domestic trade as well as international trade, although the latter is the most common context. <b>Market access</b> is not the same as free trade.</p> <p>The ability to sell in a market is often accompanied by tariffs, duties, or even quotas, whereas free trade implies that goods and services flow across borders without any extra costs imposed by governments. Even so, <b>market access</b> is seen as an early step toward deepening trade ties. <b>Market access</b> is increasingly the stated goal of trade negotiations as opposed to true free trade.</p> <p>Source: <a href="#">Kenton, 2021</a></p>
Market forces	<p><b>Market forces</b> manifest themselves in the demand for and supply of factors of production and the goods and services produced by them. <b>Market forces</b> are the determinants of prices, investment and output in competitive markets.</p> <p>Source: <a href="#">Routledge Dictionary of Economics, 1992, pp. 254–255</a></p>



<p>Market integration</p>	<p><b>Market integration</b> is a situation in which separate markets for the same product become one single market, for example, when an import tax in one of the markets is removed.</p> <p>See also <b>economic integration</b></p> <p>Source: <u>Cambridge Dictionary, n.d.</u></p>
<p>Nomenclature of territorial units for statistics (NUTS)</p>	<p><b>NUTS</b> is an acronym for the French term “<b>Nomenclature des unités territoriales statistiques</b>”, in English “<b>Nomenclature of territorial units for statistics</b>”. The <b>NUTS</b> classification is a system by which European economic regions are divided up for two reasons: (i) statistical purposes and (ii) facilitated socio-economic analyses of the regions. In total, there are three classification levels: NUTS 1, NUTS 2 and NUTS 3. Framing and application of EU regional policies happens mainly on the NUTS 2 level. More information on the <b>NUTS</b> classification can be found <u>here</u>.</p> <p>Source: <u>Eurostat, n.d.</u></p>
<p>Population density</p>	<p><b>Population density</b> is the number of persons per unit of land area. This is a major determinant of property prices, of much public expenditure, of many social costs and of productivity. <b>Population densities</b> vary greatly from country to country. Some less developed countries appear to have low <b>population densities</b> because a high proportion of their land areas are uninhabitable mountains, deserts or swamps.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 315</u></p>
<p>Price stability / monetary stability</p>	<p>The primary objective of the Eurosystem is to safeguard <b>price stability</b>, also often referred to as <b>monetary stability</b>. This does not mean individual prices, but the average of all prices: the price level. The price level is calculated using a basket of selected goods and services that are important to our everyday lives. Each month, statisticians work out the prices of the goods in this basket and calculate the average price. The ECB Governing Council considers that <b>price stability</b> is best maintained by aiming for 2% inflation over the medium term. The ECB Governing Council considers negative and positive deviations from this target as equally undesirable. If the price level rises significantly for an extended period of time we speak of inflation. If it falls, we speak of deflation. <b>Price stability</b> helps to preserve the purchasing power of money.</p> <p>Source: <u>European Central Bank, 2003; German Central Bank, n.d.</u></p>

Principal-agent problem	<p>The <b>principal-agent problem</b> is a conflict in priorities between a person or group and the representative authorised to act on their behalf. An agent may act in a way that is contrary to the best interests of the principal.</p> <p>An agent, in legal terminology, is a person who has been legally empowered to act on behalf of another person or an entity. An agent may be employed to represent a client in negotiations and other dealings with third parties. The agent may be given decision-making authority.</p> <p>In business, principals are those who own a majority stake in a company and/or play a significant role in running it. In contracts and contractual ventures, principals are the chief parties involved in the transaction who have rights, duties, and obligations regarding it.</p> <p>The <b>principal-agent problem</b> is as varied as the possible roles of a principal and agent. It can occur in any situation in which the ownership of an asset, or a principal, delegates direct control over that asset to another party, or agent.</p> <p>Source: <a href="#">Investopedia, 2023</a></p>
Productivity	<p><b>Productivity</b>, in economics, measures output per unit of input, such as labour, capital, or any other resource. It is often calculated for the economy as a ratio of gross domestic product (GDP) to hours worked. At the corporate level, <b>productivity</b> is a measure of the efficiency of a company's production process, it is calculated by measuring the number of units produced relative to employee labour hours or by measuring a company's net sales relative to employee labour hours. Simply put, <b>productivity</b> is the amount of real output produced by one unit of a factor input, for example, the number of cars assembled by one worker in a year.</p> <p>Source: <a href="#">Eurostat Statistics Explained, 2013</a>; <a href="#">Kenton, 2023</a></p>

<p>Purchasing power parities (PPPs)</p>	<p><b>Purchasing power parities</b>, abbreviated as <b>PPPs</b>, are indicators of price level differences across countries. <b>PPPs</b> tell us how many currency units a given quantity of goods and services costs across countries. Using <b>PPPs</b> to convert expenditure expressed in national currencies into an artificial common currency, the purchasing power standard (PPS), eliminates the effect of price level differences across countries created by fluctuations in currency exchange rates.</p> <p><b>Purchasing power parities</b> are obtained by comparing price levels for a basket of comparable goods and services that are selected to be representative of consumption patterns in the various countries.</p> <p><b>PPPs</b> make it possible to produce meaningful indicators (based on either price or volume) required for cross-country comparisons, truly reflecting the differences in the purchasing power of, for example, households. Monetary exchange rates cannot be used to compare the volumes of income or expenditure because they usually reflect more elements than just price differences, for example, volumes of financial transactions between currencies and expectations in the foreign exchange markets.</p> <p>Source: <u>Eurostat Statistics Explained, 2018</u></p>
<p>Purchasing power standard (PPS)</p>	<p>The <b>purchasing power standard</b>, abbreviated as <b>PPS</b>, is an artificial currency unit. Theoretically, one <b>PPS</b> can buy the same amount of goods and services in each country. However, price differences across borders mean that various amounts of national currency units are needed for the same goods and services depending on the country. <b>PPS</b> are derived by dividing any economic aggregate of a country in national currency by its respective purchasing power parities.</p> <p><b>PPS</b> is the technical term used by Eurostat for the common currency, in which national accounts aggregates are expressed when adjusted for price level differences using PPPs. Thus, PPPs can be interpreted as the exchange rate of the <b>PPS</b> against the euro.</p> <p>Source: <u>Eurostat Statistics Explained, 2014</u></p>
<p>Regional economics</p>	<p><b>Regional economics</b> deals with the analysis of firms' location decisions and the causes of regional growth. It is mainly in times of high national growth that there can be a great deal of attention paid to regional imbalances.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 345</u></p>

Regional policy	<p><b>Regional policy</b> comprises measures to reduce the imbalance in prosperity between the regions of a particular country, particularly between the region around the capital city and the peripheral provinces. Many countries have used incentives to encourage the location of expanding industries in the depressed regions and to reduce the population density of major cities. <b>Regional policies</b> are measured by the number of jobs created in depressed regions and by the extent of convergence in interregional incomes, unemployment rates and rates of output growth. <b>Regional policy</b> is most active in times of fast national economic growth as it is then easier to finance assistance to regions.</p> <p>The EU invests locally through its <b>regional policy</b>. Addressed to all EU regions and cities, it contains measures to boost economic growth and jobs and improve quality of life through strategic investment.</p> <p>Source: <u>European Union, n.d.; Routledge Dictionary of Economics, 1992, p. 345</u></p>
Rent-seeking	<p><b>Rent-seeking</b> is an economic concept that occurs when an entity seeks to gain added wealth without any reciprocal contribution of productivity. Typically, it revolves around government-funded social services and social service programs. The word “rent” is based on the economic definition of the term, which is defined as economic wealth obtained through shrewd or potentially manipulative use of resources. A more colloquial way of describing this behaviour is “privilege seeking.” An example of <b>rent-seeking</b> is when a company lobbies the government for grants, subsidies, or tariff protection. <b>Rent-seeking</b> comes in many forms from lobbying to donating funds.</p> <p>Source: <u>Majaski, 2021</u></p>
Scarcity	<p><b>Scarcity</b> is the limited quantity of a resource, factor of production or output. <b>Scarcity</b> means that there are insufficient means to satisfy all of society’s demands for resources. As population increased and there was competition for a fixed supply of natural resources, <b>scarcity</b> was viewed by many economists as the principal economic problem: it raises all the major issues of allocation and pricing and is the reason why rent is paid. Because of <b>scarcity</b>, if goods or services are offered freely, a non-price method of allocation must be used, e.g. rationing. The importance of <b>scarcity</b> as a concept is challenged by Marxists who identify other concepts as central.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 363</u></p>

<p>Shared management (of EU Funds)</p>	<p>In <b>shared management</b>, both the European Commission and national authorities in member states, such as ministries and public institutions, are in charge of running a particular programme. Around 70% of EU programmes are run this way.</p> <p>For instance, if you are a farmer anywhere in the EU, and have a project to start growing organic tomatoes, you would be eligible to apply for funds under the Common Agricultural Policy (CAP). For that, you would have to go through your country's Ministry of Agriculture, or an equivalent institution, which would be in charge of managing the funds for your project on behalf of the EU.</p> <p>The member states' administrations (at national, regional and local level) choose which projects to finance and take responsibility for day-to-day management. Working together with the member states, the Commission makes sure that the projects are successfully concluded, and the money is well spent.</p> <p>Source: <a href="#">European Commission, n.d.</a></p>
<p>(Social) welfare</p>	<p><b>Social welfare</b> is the economic well-being of a society as a whole, often measured in terms of the total volume of goods and services becoming available to it over a given period, that is, real income. There is much dispute about an appropriate measure as national income accounting does not cover all economic goods and bads of an economy and total income measure ignores income distribution. As changes in <b>social welfare</b> are used to judge the efficacy of economic policies, a variety of tests have been used to see whether there has been an unambiguous increase in <b>welfare</b>. Much of welfare economics is concerned with this difficult problem which reflects the value-loaded nature of many <b>welfare</b> discussions.</p> <p>Source: <a href="#">Routledge Dictionary of Economics, 1992, p. 381</a></p>
<p>Spillover effect</p>	<p>A <b>spillover effect</b> is the indirect effect on another person(s) of a gain or loss to the original person(s). International <b>spillover effects</b> occur when one country's actions generate benefits or impose costs on another country that are not reflected in market prices, and therefore are not “internalised” by the actions of consumers and producers.</p> <p>Source: <a href="#">Routledge Dictionary of Economics, 1992, pp. 384–385</a>; <a href="#">UN Sustainable Development Solutions Network (SDSN), n.d.</a></p>
<p>Stability</p>	<p><b>Stability</b>, as part of the ESSF Formula, entails the absence of erratic movements of markets that obstruct their smooth functioning and may lead to economic and social disruptions.</p> <p>Source: <a href="#">Müller, 2023</a></p>

Sustainability	<p><b>Sustainability</b>, as part of the ESSF Formula, purports that the destructive overuse of natural resources is undesirable, as it leads to future scarcities.</p> <p>Source: <u>Müller, 2023</u></p>
Tariff	<p>A <b>tariff</b> is a price or an import tax.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 402</u></p>
Trade-off	<p><b>Trade-off</b> refers to the relationship between two inversely connected variables such that more of one means less of another. <b>Trade-offs</b> occur in many parts of both microeconomics and macroeconomics, for instance, the <b>trade-off</b> between work and leisure, between consumption of one good and of another of a consumer with a fixed income, between high wages and high employment, between efficiency and equity. The conflicting aims of individuals and of governments make <b>trade-offs</b> inevitable; scarcity necessitates choice between competing alternatives.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 415</u></p>
Trade barrier	<p>A <b>trade barrier</b> is something such as an import tax or a limit on the amount of goods that can be imported that makes international trade more difficult or expensive.</p> <p>Source: <u>Cambridge Dictionary, n.d.</u></p>
Transaction costs	<p><b>Transaction costs</b> are the running costs of an economic system; the cost of effecting an exchange or other economic transaction. These costs, which vary in magnitude from one economic system to another, include those of negotiating and drafting contracts and the subsequent costs of adjusting for misalignments. This concept is fundamental to the analysis of economic regulation, labour market hiring, vertical integration and competition in the capital market.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 416</u></p>
Wealth	<p><b>Wealth</b> refers to the stock of assets held by a person, a firm or a country. <b>Wealth</b> is measured at a particular date, for instance, 31 December, and not over a period as is the case with income. <b>Wealth</b> statistics are subject to much error because of valuation problems and owners' concealment, especially if <b>wealth</b> and inheritance taxes are in force. Many forms of income, for instance, rent and profits, are a return to the <b>wealth</b> a person holds.</p> <p>National <b>wealth</b>, in turn, refers to the total assets owned by the residents of a country on a particular day.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, pp. 281, 438</u></p>

Welfare economics	<p><b>Welfare economics</b> is the study of how the allocation of resources and goods affects social welfare. This relates directly to the study of economic efficiency and income distribution, as well as how these two factors affect the overall well-being of people in the economy.</p> <p>In practical terms, <b>welfare economists</b> seek to provide tools to guide public policy to achieve beneficial social and economic outcomes for all of society. However, <b>welfare economics</b> is a subjective study that depends heavily on chosen assumptions regarding how welfare can be defined, measured, and compared for individuals and society as a whole.</p> <p>In short: <b>Welfare economics</b> is the branch of economics which sets out the rules for maximising the welfare of society by considering both the size of social welfare and its distribution.</p> <p>Source: <a href="#">Investopedia, 2022</a>; <a href="#">Routledge Dictionary of Economics, 1992, p. 439</a></p>
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## Acronyms

COVID-19	Coronavirus Disease 2019
CPI	Corruption Perceptions Index
EC	European Commission
ECB	European Central Bank
EP	European Parliament
EPPO	European Public Prosecutor's Office
ESSF Formula	efficiency, stability, sustainability, fairness
EU	European Union
GDP	Gross domestic product
GNI	Gross national income
GNP	Gross national product
IW	Institut der deutschen Wirtschaft Köln (in English: German Economic Institute)
NGO	non-governmental organisation
NUTS	Nomenclature des unités territoriales statistiques (in English: Nomenclature of territorial units for statistics)
n.d.	no date
OECD	Organisation for Economic Co-operation and Development
OLAF	Office Européen de Lutte Anti-Fraude (in English: European Anti-Fraud Office)

“PIF” Report	Rapport annuel sur la protection des intérêts financiers de l’Union européenne (in English: Annual report on the protection of the European Union’s financial interests)
PPP	Purchasing power parity
PPS	Purchasing power standard
RSF	Reporters Sans Frontières (in English: Reporters Without Borders)
SEA	Single European Act
SZ	Süddeutsche Zeitung
TI	Transparency International
UN	United Nations
WDR	Westdeutscher Rundfunk Köln
WTO	World Trade Organisation

## Introduction to Module 8

### About this module



Figure 89: The European Union invests great amounts of money in EU Cohesion Projects; Source: Pixabay

EU Cohesion Policy involves an important and valuable resource: money. In the current funding period 2021–2027, the European Union (EU) [plans to spend €392 billion](#) which makes up one third of the total EU budget (European Commission, n.d.). But is this money really spent on the right projects? Do investments have a sustainable effect on regional growth? And who monitors the responsible parties during the implementation process to prevent possible mismanagement of EU Funds?

These are relevant questions that journalists dealing with EU Cohesion Policy should ask themselves and inform the public about. But answering these questions requires economic knowledge. That is why Module 8 provides you with information about the basic concepts of regional economics and reporting on economic issues. This module introduces you to economic news values as opposed to traditional ones and the newly developed ESSF Formula that translates the economic concept of social welfare into four journalistic categories: efficiency, stability, sustainability, and fairness.

Eventually, once you have completed Module 8, you will not only have a profound knowledge about the economic processes involved in EU Cohesion Policy and the requirements of economic journalism, but you will also be able to address the aforementioned relevant questions. A brief hint: These will be tasks that you will practice in Module 9.

After successful completion of Module 8 and Module 9, you will be able to pursue your own journalistic stories on the economic sides of EU Cohesion Policy – and assess if EU Funds are really spent on the right projects!

### Introduction to the story of this module

You should put yourself in the following scenario during this module: You have just started as an editor for the European economic newspaper *ECONOMIX*. Your new colleagues tell you that *ECONOMIX* currently searches for economic expertise regarding EU Cohesion Policy. It is still an underreported topic in the newspaper and needs to receive more attention according to the chief editor. She is convinced that questioning whether or not EU Funds are used efficiently and if they really make a difference to regional development would be an exceptional asset that *ECONOMIX* could offer its readers.



Figure 90: Your new job as editor of *ECONOMIX*; Source: Pixabay

You take the challenge and want to become the new expert on the economics of EU Cohesion Policy!

## It's all about money!!

### Video: Experiences from economic journalism students

So you've always thought that economic concepts are boring and abstract? Quite the opposite, they can be very interesting and are an important ingredient in the daily lives of many journalists and journalism students. Before you dive into the economics of EU Cohesion Policy you want to get some inspiration from economic journalism students who are already dealing with economic issues in their daily journalistic work. In the following short video, three students from TU Dortmund University in Germany will tell you about their motivations to acquire economic knowledge, as well as how they use their skills in their journalistic work.

### Presentation of the interviewees

The interviewees you will get to know are as follows:

1. Marie Vandenhirtz, undergraduate student of the degree programme "Economic Policy Journalism" at TU Dortmund University, and trainee at the German national daily newspaper *Süddeutsche Zeitung (SZ)* in Munich, Germany
2. Sophie Brach, undergraduate student of the degree programme "Economic Policy Journalism" at TU Dortmund University, and trainee at the German public service broadcaster *Westdeutscher Rundfunk Köln (WDR)* in Cologne, Germany
3. Roman Winkelhahn, undergraduate student of the degree programme "Journalism" with the core subject "Economics" at TU Dortmund University, and trainee at the German business newspaper *Handelsblatt* in Dusseldorf, Germany



Figure 91: [Video - Experiences from economic journalism students](#); Source: TU Dortmund University/own production

Please [click on the video](#) to watch the interviewees' statements. Do pay attention to their estimations concerning the relevance of economic know-how in journalism.

### Exercise 1: Do I understand this correctly?

To become an expert on the economics of EU Cohesion Policy, it's important that you get the relevant economic vocabulary right. In the next chapters, you will encounter some new terminology emphasised **in bold letters** that is important in understanding the underlying economic concepts and processes of EU Cohesion Policy. For you to have a continuous overview of this important terminology, you have the ongoing task of filling in the attached word register with definitions of the new terms while working further on Module 8. Constantly consult the glossary for assistance! Additionally, you have the possibility to write down your own notes to the vocabulary in the word register.

Remember the following: Once you have completed Module 8, you should be able to tell your ECONOMIX colleagues what a certain term means if they ask you. The contained terminology in Module 8 will also be part of the final test at the end of the module. Before proceeding to the final test, you should compare your own word register with the glossary again for possible mistakes and changes.

In a separate document, please create a table with the following columns:

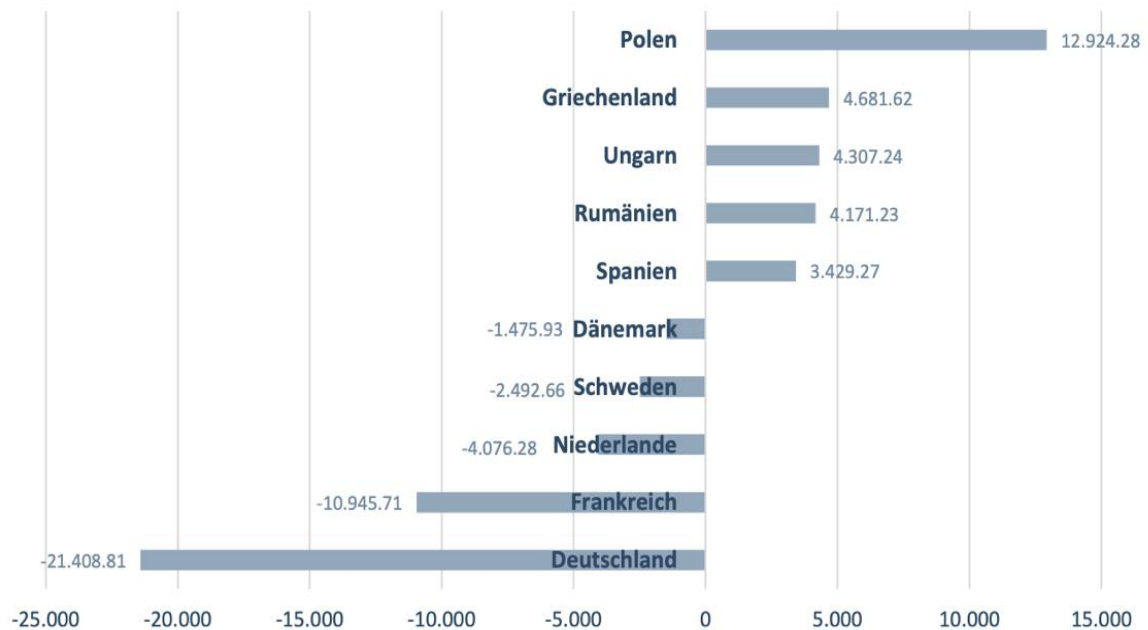
<b>Term</b>	<b>Definition</b>	<b>Own notes</b>
-------------	-------------------	------------------

### Input: It's all about money!

You have everything you need at hand now to become the new expert on the economics of EU Cohesion Policy. You do not want to wait any longer, so dive straight into the matter:

If politicians, economists, or the media talk about EU Cohesion Policy, they mostly refer to financial matters. Some EU member states benefit greatly from the European Union's financial contributions. [According to the German Economic Institute \(IW\)](#) (2022), EU payments amounted to more than 3.0% of the **gross national incomes (GNI)** of Croatia and Lithuania, and to more than 2.5% of the **GNIs** of Hungary, Bulgaria, and Latvia in 2021.

When looking at total numbers, Poland has been the undisputed leader in 2021 with almost €13 billion when calculating the difference between the country's payments to the European Union budget and the benefits it received from the collective body. In second place is Greece with a budget balance of €4.7 billion and in third place Hungary with €4.3 billion.



Quellen: European Commission, 2022; eigene Berechnungen

Figure 92: Operativer Haushaltssaldo ausgewählter Mitgliedsstaaten in Millionen Euro, 2021;  
Source: *German Economic Institute, 2022, p. 9*

But why does the EU invest such great amounts of money? Why is the special instrument of EU Cohesion Policy even needed?

### Input: Regional disparities in the European Union

European regions are characterised by substantial differences regarding **population density** and the intensity of economic activity which is, in this case, measured with the regional **gross domestic product (GDP) in purchasing power standard (PPS)** per inhabitant. If you would like to learn more about which other indicators can be used to measure economic cohesion in the EU, please consult Module 5.

The two maps below show the two mentioned variables at the level of the **NUTS 2** regions. If you would like to learn more about the **NUTS** classification, please consult Module 5.

#### Exercise 2:

Navigate through the two maps and think briefly about the following questions before you continue reading the text:

- Where do you see common features of the **population densities** and the regional **gross domestic products** when looking at European regions? Where are the differences?
- Where would you locate the economic centre of the European Union?
- The map depicts the varying population densities by NUTS 2 regions in the European Union with the help of various colouring.



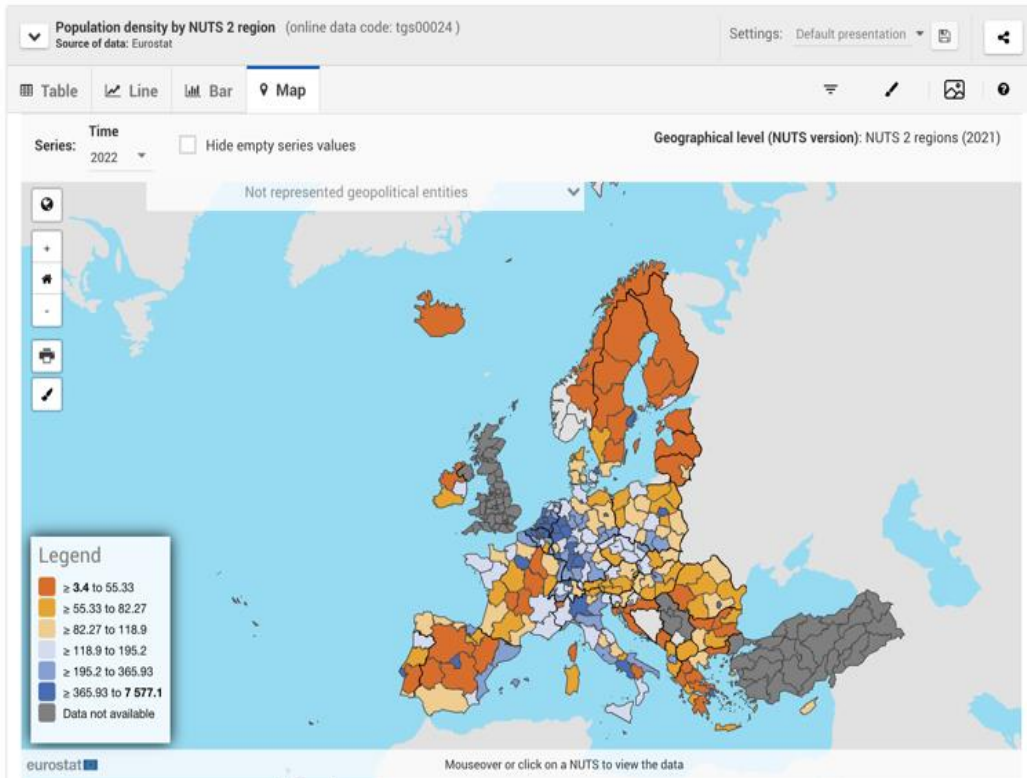


Figure 93: Map 1 - Population density by NUTS 2 regions; Source: [Eurostat, 2022](#)

The map depicts the varying regional **gross domestic products**, in purchasing power standard (PPS) per inhabitant, by NUTS 2 regions in the European Union with the help of various colouring.

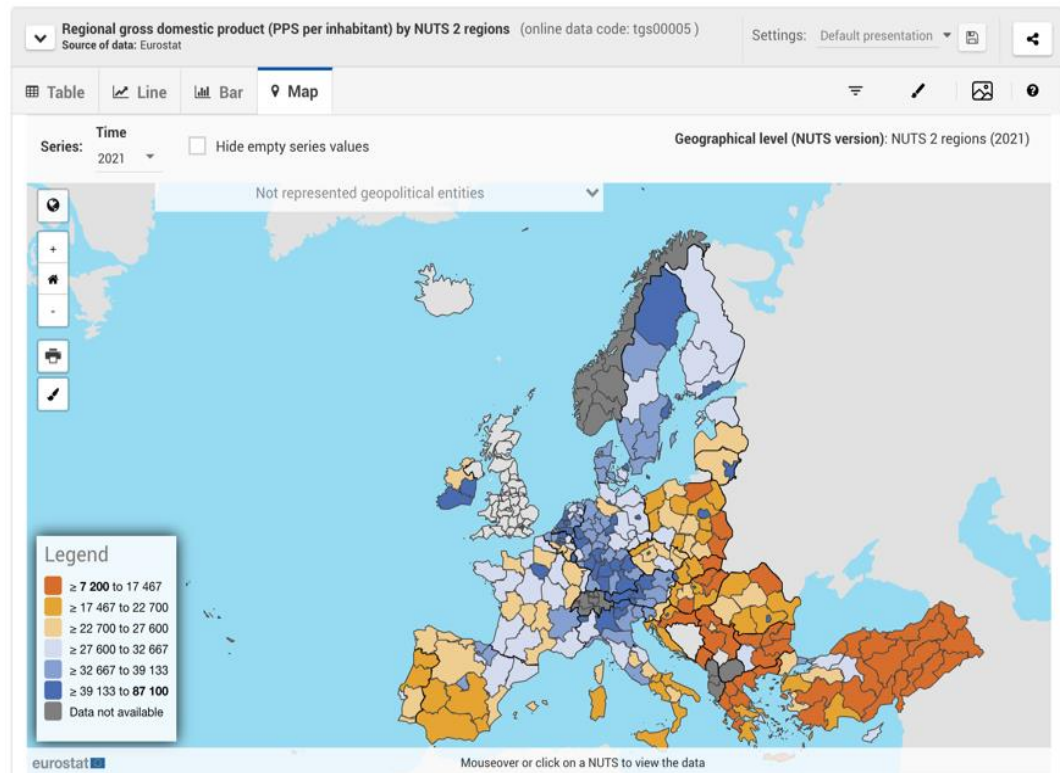


Figure 94: Map 2 - Regional gross domestic product (PPS per inhabitant) by NUTS 2 regions; Source: [Eurostat, 2021](#)



In general, you can detect certain patterns when looking at the two maps. More densely populated regions show more economic activity and less densely populated regions often coincide with lower regional gross domestic products. For instance, these are regions in Bulgaria, Romania and Greece, but also parts of Spain and Portugal.

Of course, there are exceptions: Regions in Denmark, Estonia, Finland, and Sweden are rather sparsely populated, except for their urban areas, but are, in terms of regional **GDP**, more prosperous. The economic centre of the European Union is located in Central-Northern Europe, as opposed to the rather poor peripheral regions in Eastern and Southern Europe.

The **population density** and the regional **gross domestic product** are two variables that can be used to assess people's standards of living. However, to give a comprehensive picture, also other parameters have to be included. Nevertheless, the two variables indicate that regional disparities in the European Union are still pronounced. This has a direct effect on the EU's common **economic growth**. If you want to learn more about how research comes to mixed results concerning the reduction of regional disparities within the European Union, please consult Module 4.

Regional disparities can originate from factors like culture, historical background, political history, natural resources and educational standards. Another cause of regional imbalances in the EU are so-called **gravitational effects**. You will learn more about this concept on the following pages.

### **Input: Gravitational effects in economics**

**Gravitation** is something you might associate with physics and astronomy, but the mechanism can as well be used to model trade flows in economic theory. **Gravitational effects** play a crucial role in the concentration of economic activity within the European Union.

The traditional **economic gravity model** is based on the assumption that trade between two countries depends on the size of the **gross domestic products (GDP)** and the distance of the partner countries ([Nijkamp & Ratajczak, 2021](#)). The size of the **GDP** has a positive effect on a country's foreign trade activities. In contrast, the distance between two countries affects imports and exports negatively due to increasing costs for trading activities, when geographic distances are higher. There are further factors that can have an influence on trade flows of countries, for instance, trade barriers like tariffs as well as less economic conditions, such as cultural proximity of countries or historical and political determinants.



*Figure 95: In space as in economics; Source: Pixabay*

These relations remain relevant today and can be transferred to the regional level. Nijkamp and Ratajczak (2021) argue that although modern digital technologies reduce the impact of absolute distances, gravitational effects still matter.

## Input: European centre versus periphery



When looking at the European Union as a whole, there is a discernible centre-periphery pattern. Prevalent geographic and historical factors in Europe have played a crucial role here, also in economic terms. A good indicator is the cumulative intensity of night lighting in different places and regions at night as seen in the map at the top of the page.

*Figure 96: Locating agglomeration areas; Source: Flickr / woodleywonderworks with material from NASA/GSFC, under Creative Commons licence (CC BY 2.0)*

The continuously progressing **economic integration** in the European Union favours densely populated metropolitan areas. Urban **agglomerations** are clearly visible throughout Europe, but especially in the central part of the European Union. For instance, in countries like France, Germany, and Sweden you can directly spot their capital cities with millions of inhabitants. EU Cohesion Policy aims to enable less developed regions to participate in this progressing economic integration by providing them with the necessary conditions like modern transport and communication infrastructure or better education.

### Market forces favour agglomerations

While [Krugman \(1991\)](#) locates the European hub somewhere in or near Belgium, [Tóth and Szép \(2019\)](#) see it moving from Southern Germany to the Western Czech Republic until 2015. Consequently, a shift towards the east can be observed within the past decades.

In his paper, Krugman designs a simple model of geographic concentration of manufacturing which is based on the interaction of **economies of scale** with transportation costs. The idea behind it is the following: Manufacturing companies tend to locate in regions where **demand** is larger to realize **economies of scale** and reduce transportation costs. However, at the same time, the **demand** itself is highly dependent on the distribution of the manufacturing sector. Thus, there is a reciprocal relation. Informational and technological **spillover effects** further enhance the sector's **productivity**. More and more skilled workers are attracted and settle in these regions. A prominent example is the high labour migration from Eastern Europe to Western European countries after the EU enlargement in 2004 and 2007. The free movement of people, however, is accompanied by challenging **demographic** changes. Especially the share of young as well as working-age people in the European Union is expected to decrease in the coming years and decades ([Eurostat, 2023](#)). The young and qualified workforce increasingly gathers in the economic centre of the EU, leaving other populations in rural peripheral regions, particularly in Eastern and Southern Europe, behind. Although there are costs of congestion as well, all these developments eventually result in an **agglomeration economy** with a lasting concentration of economic activity and money. It is very hard to counter the strength of these **market forces**.

### EU Cohesion Policy wants to reduce inequalities

EU Cohesion Policy, however, intends to redistribute this money from the centre to the periphery with the goal of aligning economic conditions, perspectives and standards of living within the whole European Union. In this respect, [Hoover and Giarratani \(1999\)](#) express an important strategic advice. According to the authors, instead of providing assistance to large-scale areas it would be better for **regional policy** programmes like EU Cohesion Policy to support and establish selected (**economic**) **growth** centres “at which there exist or can easily be created the necessary conditions for expanding

employment opportunity and, especially, the public infrastructure and the external economies that most activities require” (Hoover & Giarratani, 1999, p. 267). These (**economic**) **growth** centres would presumably attract the workforce from surrounding areas, thereby stimulating secondary growth of employment in the surrounding areas as well.

If you would like to know more about **regional economics**, please refer to the books by Hoover and Giarratani (1999) and [Schaffer \(1999\)](#), both in updated versions from 2020.

### **Input: The European single market – a success?!**



Figure 97: Open borders, open trade; Source: Pixabay

The introduction of the **European single market** in 1993 represented a significant reduction in **trade barriers**. [For 30 years now](#), the **European single market** has been one of the world’s biggest single market areas (European Commission, n.d.) and operates on the basis of the “**four freedoms**”: the free movement of goods, services, capital and people ([European Parliament, 2022](#)).

A policy paper authored by [Mion and Ponattu \(2019\)](#) and published by the German Bertelsmann Foundation argues that regions in the European Union profit from these freedoms, albeit to varying degrees. Using European trade data for the period 2010–2016, the researchers estimate benefits of up to €3,600 per capita in absolute numbers for people living in regions located in the geographic core of the EU, while **welfare** gains for people in peripheral regions sometimes amount to only €150 per capita. In relative terms, the geographic core of the EU benefitted more than twice as much as its periphery. The authors ascribe this to a higher **market access** of companies in the geographic centre of the European Union.

### **EU Cohesion Policy greatly benefits advanced economies as well**

At the same time, the researchers examined considerable differences in **welfare** gains not only between, but also within countries. For instance, this becomes very prominent in the divergence between Northern and Southern Italy as well as Western and Eastern Germany. Therefore, the authors conclude: The **European single market** “may reinforce differential trends in **productivity** between regions and could thus contribute to widening regional disparities” ([Mion & Ponattu, 2019, p. 22](#)).

Generally, the expenditures for EU Cohesion Policy produce significant **spillover effects** in favour of more advanced regions and countries in the European Union ([Maucorps et al., 2020](#)). For example, the contracts for implementing projects in less developed regions are often awarded to firms from more developed EU countries. Several construction companies from Germany and Austria, for instance, have a significant presence in Hungary, Slovakia and the Czech Republic. Trade is also positively affected as **exports** of goods and services are enhanced in richer member states thanks to the increase in economic activity triggered by EU Cohesion Policy in beneficiary countries. Overall, the common **economic growth** in the European Union also benefits the more advanced economies in the centre of the European Union.

Finally, considering all these concepts and relations shows that only a well-implemented and efficient EU Cohesion Policy that is geared to the specific needs of the respective regions can indeed reduce the regional disparities that are still prevalent in the European Union, and promote an economic,

social, and territorial alignment of regions. This is the first major lesson you take away for your future work at ECONOMIX.

### How efficient is EU cohesion policy?

#### Exercise 3:

So far, you have learned a lot about the relevance of EU Cohesion Policy. Still, spending great amounts of money does not necessarily lead to successful and impactful results. That's why you continue your research and want to find out how efficient EU Cohesion Policy really is.

However, before diving deeper into the topic you need to understand the term “**efficiency**” in an economic context. You might have already used the term “**efficiency**” quite often in your lives in various contexts and situations. Think about these situations again. Which associations come to your mind when you hear the term “**efficiency**”? Which other words, concepts, and ideas relate to **efficiency**? Also try to consider what the term could mean in economic theory. You may look up possible definitions as well. Fill the mind map below with your ideas. Afterwards, check the definition of the term “**economic efficiency**” on the next page.

Use a maximum of 15 minutes to work on this exercise.

#### Definition: Economic efficiency

Use your filled map and compare your results with the below definition of the term “**economic efficiency**”.

*“Economic efficiency is when all goods and factors of production in an economy are distributed or allocated to their most valuable uses and waste is eliminated or minimised. A system is considered economically efficient if the factors of production are used at a level at or near their capacity.*

*In contrast, a system is considered economically inefficient if available factors are not used to their capacity. Wasted resources and deadweight losses may cause economic inefficiencies.” (Investopedia, 2020)*



Figure 98: Eureka moment; Source: Pixabay

You see that economic theory has a very distinct view on the term “**efficiency**”. This is important for you to understand as you will come across this term quite often in this module as well as in Module 9. For this reason, please add the term and its definition to your word register now.



## Video: How effective and efficient is EU Cohesion Policy?

You will now watch a short video in which Richard Brandt, Academic Researcher at the Institute of Journalism at TU Dortmund University in Germany, gives you an introduction on how effectively EU Cohesion Policy has been implemented to date.

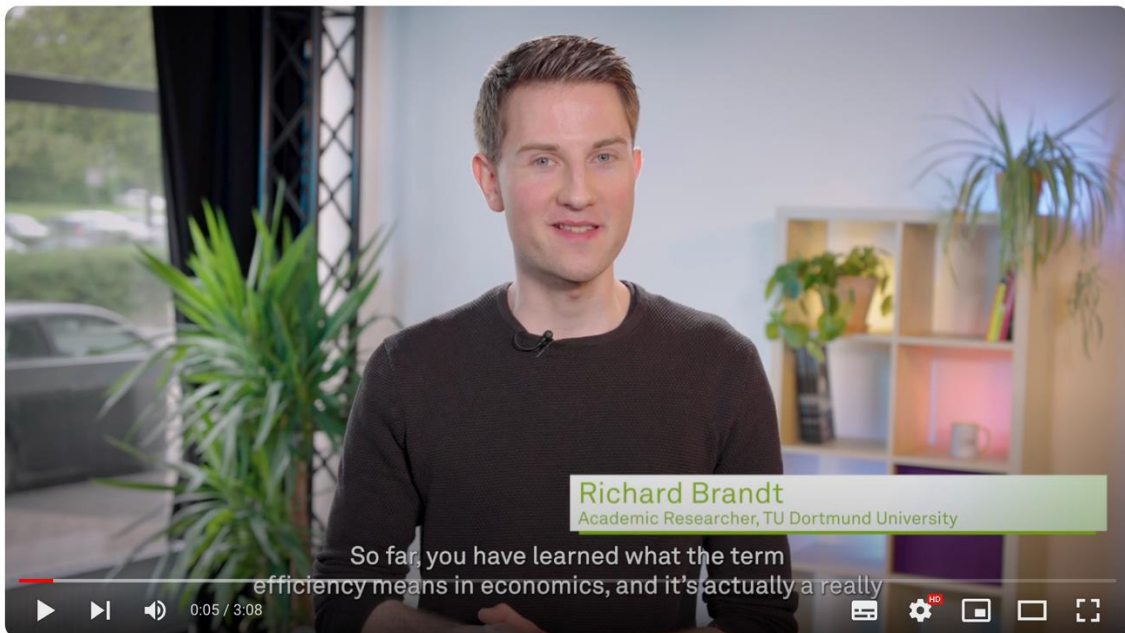


Figure 99: [Video - How effective is EU Cohesion Policy?](#); Source: TU Dortmund University/own production

Please [click on the video](#) to watch the short input. Pay particular attention to the results presented by researchers on the effectiveness of EU Cohesion Policy.

### Input: Partly effective, partly ineffective – The economic effects of EU Cohesion Policy

Around 70% of EU programmes are implemented under **shared management** to ensure co-ownership of the projects:

*“The member states' administrations (at national, regional and local level) choose which projects to finance and take responsibility for day-to-day management. Working together with the member states, the Commission makes sure that the projects are successfully concluded, and the money is well spent.”* ([European Commission, n.d.](#))

Thus, the European Commission's (EC) role in the **shared management** of EU Funds is to ensure that the funds are used efficiently to achieve their intended goals.

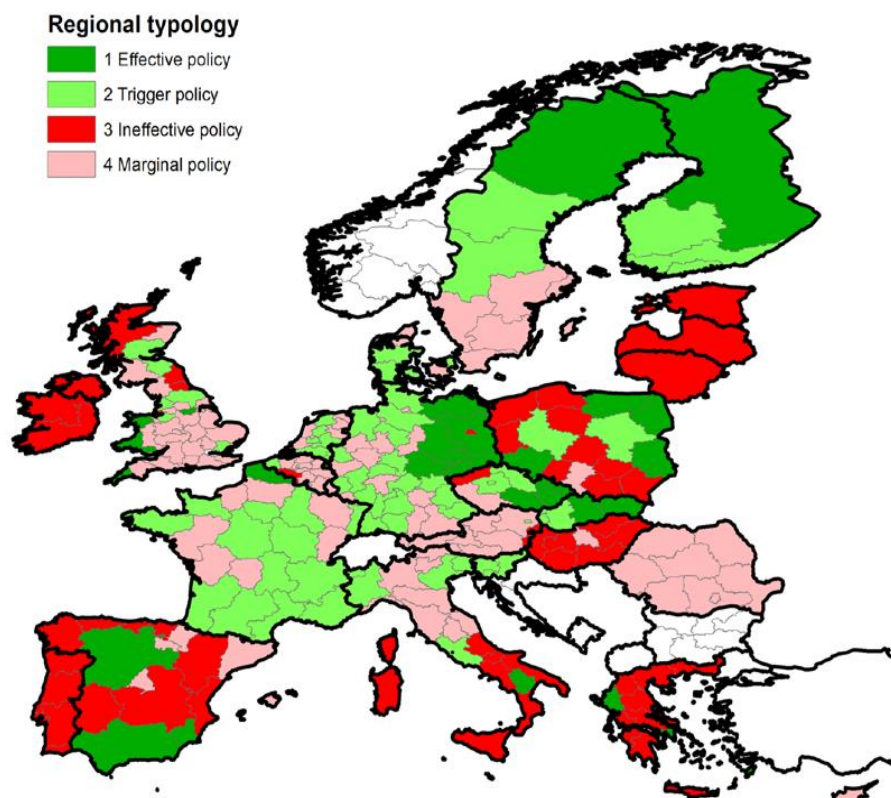


Figure 100: Identifying the impact of EU Cohesion Policy; Source: [Di Caro & Fratesi, 2021, p. 316](#)

As you have seen in the video, focusing solely on the economic objective of fostering long-run **economic growth**, [Di Caro and Fratesi \(2021\)](#) define various types of impact of EU Cohesion Policy at the level of **NUTS 2** regions. They distinguish between “effective” (high funding intensity, positive impact), “triggering” (low intensity, positive impact), “ineffective” (high intensity, low or no impact) and “marginal” (low intensity, low or no impact).

Effective and triggering effects are marked in green whereas ineffective and marginal effects are depicted in red on Map 4. The colour intensity describes the level of EU Cohesion Funding received by the respective regions since the introduction of EU Cohesion Policy at the very end of the 1980s. Dark colours comprise the regions that have received a higher level of assistance than the group average and pale colours show the regions where the level of assistance is lower than the group average.

Di Caro and Fratesi’s results show that “ineffectiveness” is a wide-spread problem, in the sense that regions receive intense EU Cohesion Funding without a measurable **growth**-enhancing impact; this is particularly true for peripheral regions that have received a lot of EU money since the 1990s – Portugal, Hungary, Ireland, the Baltics as well as large parts of Greece, Poland, Spain, and Southern Italy.

By contrast, the researchers identify an effective and triggering impact in regions like Northern Scandinavia (Finland and Sweden), Slovakia as well as in parts of France, Poland, and Germany ([Di Caro & Fratesi, 2021, p. 316](#)).

What leads to these results? Di Caro and Fratesi mention a variety of conditions and factors that contribute to the long-run success or failure of EU Cohesion Investments in the observed regions. Primarily, the national and regional specificities as well as the quality of regional institutions and governance play a significant role. For instance, the researchers identify “persistent difficulties” in high-assisted countries like Portugal, Spain, Greece and regions like Southern Italy with respect to the “progressive reduction of co-financing rates and national ordinary **resources**” ([Di Caro & Fratesi, 2021](#), p. 314). Additionally, member states that are more developed, have a higher **GDP** and are part of the **eurozone**, reflecting the positive roles of **monetary and price stability**, are more likely to see positive impacts of EU Cohesion Policy. Lastly, a high level of education and training of people increases the effectiveness of EU Cohesion Policy.

### **Input: EU Cohesion Policy must tackle current and future challenges**



*Figure 101: The green transition is one of the EU's main priorities;  
Source: Pixabay*

Further economic analyses have amassed a host of evidence questioning the **efficiency** of EU Cohesion Policy. Many projects do not meet their aspired goals, or even have detrimental effects. [Fiaschi et al. \(2017\)](#), using a special **growth** model, find nonsignificant effects for EU Funds, but strongly positive effects for other instruments of **regional policy**. In a longitudinal comparative analysis covering four programme periods, [Bachtler et al. \(2017\)](#) conclude that spending through EU Cohesion Policy has suffered from a lack of conceptual thinking, vaguely defined objectives and mismanagement, while they concede that there is evidence of improvement over time.

In a study conducted at the request of the European Parliament (EP), [Darvas et al. \(2019\)](#) reckon that EU Cohesion Policy was clearly motivated by the treaty-based objective to reduce disparities between the levels of development of various regions and the backwardness of the poorest ones. Nevertheless, the authors argue EU Cohesion Policy suffered from a range of, at times contradictory, goals. Social, political, economic and ecological considerations tend to be hard to disentangle, to the effect that the literature on the impact of EU Cohesion Policy is largely inconclusive, so they recommend concentrating research on unequivocally successful cases, in order to induce a process of learning from best practices ([Darvas et al., 2019](#)). You will come across potential areas of conflict in greater detail when you get to know the **ESSF Formula** later on in Module 8 and apply it in Module 9.

### **Finding adequate responses to the pandemic and the digital and green transition**

The recent COVID-19 pandemic has highlighted these **trade-offs** between social, political, economic and ecological goals. The pandemic has the potential to exacerbate existing regional disparities in the EU.

[Maucorps et al. \(2022\)](#) gauge the impact of the major trends of the digital and green transition on cohesion in the European Union and foresee increasing polarisation due to contrasting levels of readiness for the twin transition. According to the researchers, the digital and green transition will increase disparities across European regions even further, as the necessary structural changes will be easier to implement for already highly developed regions located mostly in the European centre. In



contrast, peripheral regions already lagging will face additional burdens on improving their position. In this regard, the European Union could further drift apart, which requires a future EU Cohesion Policy to appropriately address the current convergence challenges created by the twin transition. The authors write:

*“[...] EU Cohesion Policy must overcome the economic forces that favour a growing **agglomeration** of high-value economic activities in urban and industrial centres if the Union wants to maintain its goal of economic, social and territorial cohesion [...].” (Maucorps et al., 2022, p. 24)*

### **Input: How could EU cohesion policy become more efficient?**



Figure 102: Short recap; Source: Pixabay

You take a break and have a coffee in the ECONOMIX staff kitchen. You recap what you have learned so far. The first major lesson you took away from your research was that only a well-implemented and efficient EU Cohesion Policy that is geared to the specific needs of the respective regions can indeed reduce the regional disparities that are still prevalent in the European Union. The second major lesson is that EU Cohesion Policy is not always implemented efficiently, but that there is considerable improvement potential.

Since the economic effects of EU Cohesion Policy are mixed, and outcomes vary greatly between successes and failures, journalism could play a decisive role. Journalists should scrutinise concrete EU Cohesion Projects, hold officials and companies accountable, and promote public engagement throughout the entire process of planning and implementing EU Cohesion Projects. According to [Stiglitz \(2002\)](#), independent media alleviate **asymmetric information**, helping to diminish the **principal-agent problem** that is typically inherent in economic assistance programmes.

### **Economic journalism can act as a corrective**

Thus, (economic) journalism can provide transparency in the implementation of EU Cohesion Policy, paying attention not only to the interests of the elites of the economic policy system such as politicians, companies and other economic decision makers, but also of citizens, non-governmental organisations (NGOs) and others.

Studies of media coverage of EU Cohesion Policy find that reporting in regional media is mostly positive, while national and international media tend to be more critical ([Mendez et al., 2020](#)). On social media, the EU and local government institutions largely set the agenda ([Carrascosa et al., 2018](#)). These findings could possibly point to deficits in reporting practices in regional news media: If journalists are not reporting critically about the implementation of EU Cohesion Projects, they cannot reveal potential wrongdoings like **rent-seeking, corruption, fraud** and mismanagement of EU Funds.

## Input: Watch out for corruption!

A superior threat to the efficient implementation of EU Funds is **corruption**. **Corruption** comprises economic, environmental, political and social costs for individuals and also for society. You may watch the short video [“How does corruption affect you?”](#) on YouTube to get an initial overview (Transparency International, 2020).



Figure 103: Beware of criminal intentions;  
Source: Pixabay

**Corruption** involves the exploitation of **asymmetric information**. Simply put, it takes advantage of the fact that there are differences in information access for people and groups. An important distinction must be made between situational and structural **corruption** ([German Federal Criminal Police Office, 2023](#)), the latter referring to a situation where the act of **corruption** is deliberately planned. **Corruption** can also take on many forms, for instance, **bribery**, **embezzlement**, **fraud**, **extortion**, and **favouritism** ([Amundsen, 2000](#)).

### Specific EU institutions to combat corruption

**Corruption** can occur in every phase of the implementation process of EU Cohesion Projects – from tender procedures over the final selection of projects to their eventual realisation. To combat such criminal intentions, the European Union has set up two institutions. To start with, there is OLAF, the European Anti-Fraud Office ([OLAF – European Anti-Fraud Office, n.d.](#)). Its key tasks are

- to carry out independent internal and external administrative investigations into **fraud**, **corruption** and other illegal activities affecting EU Funds
- to investigate serious misconduct by EU staff and members of the EU institutions
- to develop a sound anti-fraud policy

Furthermore, OLAF publishes an [annual activity report](#) (European Commission, n.d.) as well as an annual report on the protection of the European Union’s financial interests – in French “Rapport annuel sur la protection des intérêts financiers de l’Union européenne”, the [“PIF” Report](#) (OLAF – European Anti-Fraud Office, n.d.).

OLAF works in close cooperation with the [European Public Prosecutor’s Office](#) (EPPO), an independent body of the European Union with the competence to criminally investigate, prosecute and bring to judgement offences against the EU budget (EPPO – European Public Prosecutor’s Office, n.d.). If you would like to know more about the two institutions and their current and past investigations, please refer to the linked websites.

Another instrument run by the European Commission together with [Transparency International](#) (TI) are the so-called [Integrity Pacts](#), “an innovative tool that involves civil society monitoring of selected public procurement projects, to safeguard EU Funds from the risks of **fraud** and **corruption** and to increase transparency and accountability” (European Commission, n.d.). EU activities are further complemented by investigations by member state authorities at national, regional and local level.

## Misconduct is sanctioned

**Fraud** and **corruption** can damage the European Union in many ways, be it financially (undetected **fraud** causes prejudice to the EU), reputationally (**fraud** damages the public image of the EU), or operationally (policy objectives are missed if funds are not used for the intended purpose). If **fraud**, **corruption** or other forms of misuse of EU Funds are detected, potential penalties include the reimbursement of affected funds as well as a suspension for further acceptance of EU Funding.

For instance, the European Commission withholds EU Funds for Hungary due to concerns related to **corruption**, conflict of interest and rigged public procurements, among others ([Sorgi, 2023](#)). One specific accusation is that public tenders in Hungary are often won by companies with ties to the Hungarian prime minister Viktor Orbán. If you would like to learn more about journalistic investigations into that topic, please consult Module 11.

Suspicious of **fraud** can be reported not only by EU staff and institutions, but also by EU citizens. If you would like to know more about preventing **fraud** and **corruption** in EU Funds, please refer to the [EU Funds Anti-Fraud Knowledge & Resource Centre](#) (European Commission, n.d.).

## EU Funds at high risk for corruption

[Fazekas and Tóth \(2017\)](#) investigate the prevalence of **corruption** in the context of EU Funds and find empirical evidence that “EU-funded public procurement contracts carry a greater risk of **corruption** than domestically funded ones” (p. 199). Given the EU’s extensive monitoring and auditing framework that exceeds the measures applied in many countries, these results are rather surprising. The authors note that officials handling EU Funds on the ground enjoy large degrees of discretion and that “EU funds, like any external funding, weaken the link between domestic civil society, taxation and policy performance” ([Fazekas & Tóth, 2017, p. 188](#)).

## Exercise: Corruption and freedom of the press

During your further research you come across two well-known maps by the NGOs [Transparency International](#) and [Reporters Sans Frontières](#) (RSF), in English Reporters Without Borders.

Every year, Transparency International publishes a new Corruption Perceptions Index (CPI). The CPI ranks 180 countries around the world by their perceived levels of public sector **corruption**, scoring on a scale of 0 (highly corrupt) to 100 (very clean). If you would like to know more about the CPI’s methodology, and which concrete developments lead to its results, or get access to further materials like the CPI 2022 Report, please refer to the [TI website](#) (Transparency International, n.d.).

Reporters Without Borders publishes the World Press Freedom Index for 180 countries. The organisation defines press freedom as

*“the ability of journalists as individuals and collectives to select, produce, and disseminate news in the public interest independent of political, economic, legal, and social interference and in the absence of threats to their physical and mental safety.”* ([Reporters Sans Frontières, n.d.](#))

If you would like to know more about the aim, the methodology and the classification of the World Press Freedom Index as well as additional statistics, please refer to the [RSF website](#) (Reporters Sans Frontières, n.d.).

#### Exercise 4:

The two maps below show the Corruption Perceptions Index (CPI) and the World Press Freedom Index. Answer the following questions and take notes:

1. Which initial impression do you get from the maps?
2. What would you conclude at first sight?
3. What is the respective ranking of your own country in both indices?
4. Can you confirm your initial conclusion?

Use a maximum of 10 minutes to work on this exercise.

The solution to this exercise can be found at the very end of this module.

## CORRUPTION PERCEPTIONS INDEX

2022

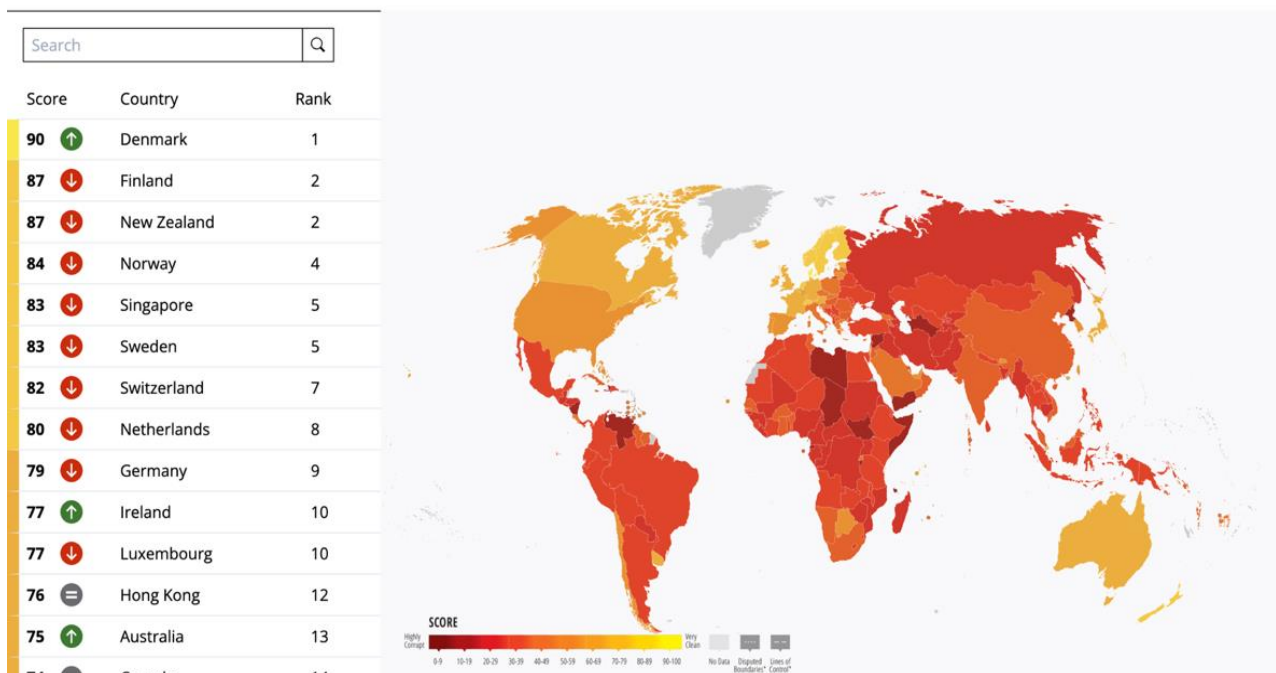


Figure 104: Corruption Perceptions Index 2022;  
Source: [Transparency International, 2023](#), under Creative Commons licence (CC BY-ND 4.0)





Figure 105: World Press Freedom Index 2023; Source: [Reporters Sans Frontières, 2023](https://rsf.org/en/world-press-freedom-index-2023)

### Input: Journalism investigates and reveals malpractices

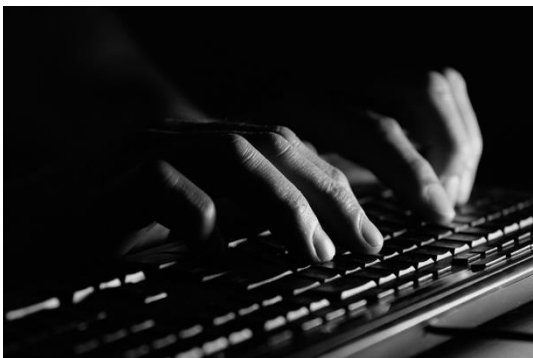


Figure 106: Journalism can prevent wrongdoings;  
Source: Pixabay

If money is spent inefficiently, it is also spent unfairly and can potentially undermine people’s trust in the European Union. **Corruption** doesn’t only hurt the criterion of **efficiency**, but also that of **fairness** as it takes away **resources** from society that could have been used for the sake of the community’s well-being. **Corruption** gives an exclusive advantage to the beneficiaries. This must be watched and investigated by independent bodies. The threat of disclosure can be very effective in fighting **corruption**. Media and journalism play a crucial role here ([OECD, 2018](https://www.oecd.org/corruption/)).

If you would like to know more about how journalists concretely reveal **corruption**, please refer to the website of [Investigate Europe](https://investigate-europe.org/) (n.d.) and consult Module 11 as well. Additionally, you find further literature on this topic at the end of this module.

At the same time, journalists who report on wrongdoings of people in power can be exposed to interference, intimidation and even assaults. A prominent example is the Maltese journalist [Daphne Caruana Galizia](https://daphne-caruana-galizia.org/) who investigated **corruption** in her home country and was killed in a car bomb attack in 2017 (Daphne Caruana Galizia Foundation, n.d.).

To prevent crises and malpractices of any kind, (economic) journalism should be forward-looking. This is of utmost importance in the European context as no real European public sphere exists, which

means that European topics tend to receive too little attention or are exclusively framed at national levels. To make matters worse, European issues are often presented in a complex and abstract way, and as rather detached from people's everyday experience. Thus, they are a particularly hard sell ([Mourlon-Druol et al., 2022, pp. 4–8](#)). If you would like to learn more about the role of the media in the European context, please consult Module 5 and Module 6.

If these European topics also deal with economic contexts, it is even more difficult to generate attention. Why is that?

## The ESSF Formula

### Input: Journalistic news values

You decide to look up journalism theory which has investigated how journalists select topics for media coverage. Editorial decisions about what subjects to cover are informed by news values ([Harcup & O'Neill, 2017](#)). [Müller and Hornig \(2020, pp. 4–5\)](#) summarise journalistic news values as follows: timeliness, negativity, conflict, proximity, prominence, and consonance.



Figure 107: What makes a newsworthy story?;  
Source: Pixabay

They further elaborate:

*“What’s happening today is more important than what happened yesterday. It helps, if a problem is addressed, even better, if it results in a clash between persons, groups, or other entities. The closer to home all this takes place, or the more it affects the readers personally, the better. The involvement of well-known figures enhances a story’s news value. If it resonates with established frames or narratives, or if other media are intensely reporting on it, an issue’s priority tends to increase.”* ([Müller & Hornig, 2020, p. 5](#)).

However, according to the researchers, a seventh news value should be added – accessibility – meaning that issues which are easy to understand enjoy a communicative advantage.

If you would like to learn more about news values in European reporting and how news are framed in the European context, please consult Module 6.

### Input: Economic topics have a hard time



Figure 108: Economic issues can be hard to grasp;  
Source: Pixabay

Taking these news values into account, explains why economic issues are hardly ever on the media agenda. Economic journalism mainly deals with slowly evolving problems that cannot be related to a particular event. Often the foci of reporting are rather abstract and complex stories related to policy fields like monetary or tax policy. These stories are situated in far-away places or in trans- and supranational contexts. For instance, there is neither relevant journalistic coverage on what happens at international bodies like the World Trade Organisation

(WTO) nor on current developments in important emerging markets like Brazil or India.

With respect to EU Cohesion Policy, for example, the **shared management** of EU Funds with its various layers and involvements of the European Commission and member state authorities can seem quite complicated to citizens, thereby decreasing the incentive to report on EU Cohesion Policy in the media even further.

A strategy to raise the newsworthiness of certain economic issues is to relate them to leading figures or to employ a populist short-cut logic. According to [Müller and Hornig \(2020, p. 5\)](#), consonance has become even more prevalent in contemporary economic journalism, as it is easy to adopt what other media outlets have already reported on, for instance, on the internet. These findings constitute a massive threat as relevant economic developments may be overlooked for a long time – until things turn bad.

However, if traditional news values don't seem to be suitable for media coverage of economic issues, what other factors should economic journalists rely on when they are looking for relevant topics to cover?

### **Video: Introduction to the ESSF Formula**

The **ESSF Formula** is a newly developed concept that can be a great support in finding relevant economic angles and issues in daily journalistic work. Watch the introduction to the **ESSF Formula** by Henrik Müller, Full Professor of Economic Policy Journalism at the Institute of Journalism at TU Dortmund University in Germany.



Figure 109: *Video - Introduction to the ESSF Formula; Source: TU Dortmund University/ own production*

Please click on the video to watch the introduction to the **ESSF Formula**. Add the term to your word register and note down relevant information on central concepts and terminology of the **ESSF Formula**.



### Exercise 5: How does the ESSF Formula exactly work?

Please read the following abstract on the **ESSF Formula**, highlight the main information and add it to your word register. In Module 9, you will apply the **ESSF Formula** to the example of a new sports hall that should be built on the edge of a nature reserve with important biodiversity (see also the section “The story of the sports hall” and the following sections of Module 7).

Use a maximum of 20 minutes to work on this exercise. You can find a suggestion for a solution to this Exercise at the very end of this module.

The **ESSF Formula** puts forward an innovative system of economic news values that journalists can employ to pursue independent reporting on economic policy, business and finance. As you have previously learned, traditional news values do not capture what’s necessary to cover those topics adequately.

It’s not far-fetched to conclude that economic journalism should borrow the goal of welfare maximisation (part of **welfare economics**) as its ultimate objective from economic theory. **Welfare** is a somewhat open concept. It can be concretised by filling in purely materialistic objectives, such as boosting current income or consumption, but also by considering long-term altruistic motives, such as slowing down climate change or securing prosperity for future generations.

Translating the economic concept of **welfare** into journalistic categories, economic journalism should be guided by the **ESSF Formula – efficiency, stability, sustainability, and fairness**. This novel approach is meant to provide a set of news values for economic journalism (Müller, 2023). When the **ESSF Formula** is violated, there is a case for a story. When it is badly violated, it should be a major one. The **ESSF Formula** strives to capture how journalists (should) think about economic developments, which aspects should be considered, which current and future **trade-offs** need to be borne in mind, and which potential remedies are at hand – that is, how a particular issue could be framed.

The **ESSF Formula** implies judgements: **efficiency** means there shall be no **waste** of **economic resources**, the more income and **growth** the better, all else being equal. **Stability** entails the absence of erratic movements of markets that obstruct their smooth functioning and may lead to economic and social disruptions. Sustainability purports that the destructive overuse of natural **resources** is undesirable, as it leads to future **scarcities**. **Fairness** rules out exploitation and overreach of any kind resulting from the asymmetric distribution of **wealth**, power, or information.

The **ESSF Formula** is inspired by economic policy recommendations like the [UN Global Compact](#) (n.d.), the work on [Well-being indicators at the Organisation for Economic Co-operation and Development \(OECD\)](#) (n.d.), the Stiglitz report on social progress commissioned by former French President Nicolas Sarkozy ([Stiglitz et al., 2009](#)), or the W3 Formula proposed by a group of experts to the German parliament ([Schmidt & aus dem Moore, 2014](#)). The **ESSF Formula** is also related to EU Cohesion Policy priorities such as enhancing competitiveness, social inclusiveness and decarbonisation.

All these conceptual efforts stress that the goals of achieving balanced **economic growth** and an efficient allocation of **resources** must be complemented with social and environmental considerations. Both media outlets and individual journalists may stress a variety of aspects, depending on their respective political bent: a left-leaning publication may put more weight on **fairness** and **efficiency** (high employment, **growth**), a conservative one will stress **efficiency** and

**stability**, a greenish one **sustainability** and **fairness**. So, even if everybody accepts the **ESSF Formula**, there is still plenty of room for disagreement.

It should be noted that the **ESSF Formula** focuses on outcomes, not principles. It is open to many ways of doing business and economic policy, whether private or public, financial market-driven or government-driven, corporatist or individualistic. What matters are the respective arrangement's results.

Together the four categories constitute a coordinate plane covering various aspects of **welfare**. When inefficiency is pushed back, when instability is avoided, when **sustainability** is provided for, and injustices are thwarted, conditions are laid for a society to prosper in a pacified manner over the long-term. Economic journalism should highlight slippages from these goals and provide sufficient transparency so that they can be worked out.

### Exercise: Final test



You have almost worked your way through the content of Module 8 and eventually learned the third major lesson: (Economic) Journalism plays a crucial role in scrutinising the implementation of EU Cohesion Policy. In this regard, the **ESSF Formula** serves as a useful toolbox that will help you detect shortcomings and bring neglected angles into public discussion.

*Figure 110: Apply your new skills; Source: Pixabay*

Finally, you should test your acquired knowledge in a concluding test now, which consists of two exercises and helps you assess your understanding of the terminology and concepts you have come across in this module. In each exercise, you have the possibility to compare your answers to the correct solutions. Thereby, you will be able to continuously check your individual performance. Use the word register you have filled in while working on this module for assistance. Before heading on to the final test, compare your word register to the glossary now to see if you got the terminology with the respective definitions correctly.

## Exercise 6: Sebastian, the new trainee

Your new colleague Sebastian approaches you. He has just started as a trainee at ECONOMIX and the chief editor has assigned him the task to write a sample article about the economic fundamentals of EU Cohesion Policy. Sebastian asks you to give him a short introduction on the topic. Fill in the gaps with the relevant terminology. Use your word register for assistance.

*Hey Sebastian,*

*I am happy to give you a short introduction on the economic fundamentals of EU Cohesion Policy. When we are talking about EU Cohesion Policy, we are always talking about a great amount of money. We are now, as you know, in the funding period 2021–2027. In these seven years alone, the European Union wants to invest €392 billion in EU Cohesion Projects. This makes up one third of the total EU budget. That's quite a lot, isn't it?*

*Some EU member states receive substantial funding. In countries like Croatia, Lithuania or Hungary it can amount to up to 3.0% of the countries' gross national incomes. Differences in the degree of financial contributions by the European Union originate from considerable regional disparities in Europe, for instance, with respect to economic activity and \_\_\_\_\_. The economic centre of the European Union is in Central-Northern Europe, whereas peripheral regions in Eastern and Southern Europe are rather poor. This is due to \_\_\_\_\_.*

*As \_\_\_\_\_ in the European Union progresses, densely populated metropolitan areas are favoured the most. They find it easy to attract companies and workforce as \_\_\_\_\_ and \_\_\_\_\_ in these regions are already high. In general, there are strong market forces at play. You can see urban \_\_\_\_\_ all over Europe, but especially in the central part of the European Union. By supporting less developed regions in the establishment of necessary infrastructure, education and other important requirements, EU Cohesion Policy wants to enable them to take part in \_\_\_\_\_ as well.*

*For 30 years now, the \_\_\_\_\_ has been one of the world's biggest single market areas. It is based on the "\_\_\_\_\_": the free movement of goods, services, capital and people. These conditions lead to \_\_\_\_\_ which favour the more advanced regions and countries of the European Union again. However, you know that the main goal of EU Cohesion Policy is to promote an economic, social, and territorial alignment of regions, so that all EU citizens can enjoy the same standard of living. In this respect, you could therefore ask yourself: How \_\_\_\_\_ is EU Cohesion Policy really? Researchers come to mixed results with some seeing substantial improvement potential in the use of EU Funds.*

*And, Sebastian, we as journalists can make a difference here. We can act as correctives and provide transparency in the implementation of EU Cohesion Policy. If we are not reporting critically, we cannot reveal potential wrongdoings like mismanagement, \_\_\_\_\_ and \_\_\_\_\_ of EU Funds. To prevent these kinds of malpractices, (economic) journalism needs to be forward-looking. Currently, European topics tend to receive too little attention and if these topics also deal with economic contexts, it is barely possible to generate any attention. But that is the challenge we accept, Sebastian!*

The solution to this exercise can be found at the very end of this module.

### Exercise 7: Sebastian's first editorial meeting

You are meeting Sebastian in the hallway the day after your talk. He has successfully submitted his sample article on the economic fundamentals of EU Cohesion Policy to the chief editor and thanks you for your valuable inputs.

Sebastian tells you that he is a bit nervous at the moment: His first editorial meeting at ECONOMIX is coming up and with it his first chance to suggest a topic for a real ECONOMIX article. Therefore, he is currently researching newsworthy topics dealing with EU Cohesion Policy. Sebastian thinks that the **ESSF Formula** could be a great support, but he is not sure if he has understood the concept correctly.

Decide if Sebastian's statements are correct or false.

1. Traditional journalistic news values can be easily transferred and applied to coverage of economic issues.
2. The ESSF Formula comprises a set of economic news values.
3. The ESSF Formula translates the economic concept of efficiency into four journalistic categories.
4. The acronym ESSF stands for equality, stability, sustainability, and fairness.
5. The four journalistic categories of efficiency, stability, sustainability, and fairness are often contradictory. That's why they must be weighed up and a balance found.
6. When the ESSF Formula is violated, there is a case for a story. When the ESSF Formula is badly violated, it should be a major one.
7. Economic policy recommendations like the UN Global Compact or the work on Well-being indicators at the Organisation for Economic Co-operation and Development (OECD) serve as inspiration for the ESSF Formula.
8. The ESSF Formula predicts which one of the four categories of efficiency, stability, sustainability, and fairness journalists will put most emphasis on.
9. The ESSF Formula focuses on principles, not outcomes. The way of doing business is very decisive. What matters less are the individual arrangement's results.
10. Economic journalism should highlight slippages from the journalistic categories of efficiency, stability, sustainability, and fairness and provide transparency so that they can be worked out.

The solution to this exercise can be found at the very end of this module.

## Conclusion

Module 8 has helped you acquire knowledge and skills in **regional economics**, economic journalism and the **ESSF Formula**. Ultimately, you should take three major lessons with you for your future work as ECONOMIX editor:

1. Only a well-implemented and efficient EU Cohesion Policy that is geared to the specific needs of the respective regions can indeed reduce the regional disparities that are still prevalent in the European Union, and promote an economic, social, and territorial alignment of regions.
2. EU Cohesion Policy is not always implemented efficiently. There is considerable improvement potential.
3. (Economic) Journalism plays a crucial role in scrutinising the implementation of EU Cohesion Policy. In this regard, the **ESSF Formula** serves as a useful toolbox that will help you detect shortcomings and bring neglected angles into public discussion.



Figure 111: Congratulations on completing Module 8!; Source: Pixabay

## Further literature and contact information

We would like to recommend further literature to you:

### Academic literature on economic news coverage, economic journalism and the ESSF Formula:

Müller, H. (2023). *Challenging Economic Journalism. Covering Business and Politics in an Age of Uncertainty*. Palgrave Macmillan. <https://doi.org/10.1007/978-3-031-31030-0>



Figure 112: More to read; Source: Pixabay

### Journalistic contributions on investigations about corruption, fraud and other malpractices in Europe:

IJ4EU – Investigative Journalism for Europe. (n.d.). *Projects Archive*. IJ4EU. <https://www.investigativejournalismforeu.net/projects/>

Rise Project. (2023, 27 March). *The Organised Crime and Corruption Watch. Regional edition no. 1: Stolen Millions in EU Funds*. Rise Project. <https://www.riseproject.ro/investigation/the-organised-crime-and-corruption-watch-regional-edition-no-1-stolen-millions-in-eu-funds/>

Rise Project. (2023, 4 May). *The Organised Crime and Corruption Watch. Regional edition no. 2: Stolen Millions in EU Funds (II)*. Rise Project. <https://www.riseproject.ro/investigation/the-organised-crime-and-corruption-watch-regional-edition-no2-stolen-millions-in-eu-fundsii/>



### **Institutional sources on awards being given to journalistic investigations:**

Investigative Reporting Award, awarded for discovering and revealing facts, and exposing hidden news to the public:

European Press Prize. (n.d.). *Categories – European Press Prize*. European Press Prize. <https://www.europeanpressprize.com/awards/categories/>

*IJ4EU Impact Award*, celebrating excellence in cross-border investigative journalism in Europe:  
IJ4EU – Investigative Journalism for Europe. (n.d.). IJ4EU Impact Award. IJ4EU. <https://www.investigativejournalismforeu.net/awards/the-ij4eu-impact-award/>

If you have any questions or suggestions, please feel free to contact the authors of this module:

**Henrik Müller** has gained professional experience at various media, his last position was deputy editor-in-chief at the German business monthly “manager magazine”, an affiliate of “Der Spiegel”. He has been honoured with several journalism awards. Since 2013, he is Full Professor of Economic Policy Journalism at TU Dortmund University in Germany, directing the Bachelor programme “Economic Policy Journalism” and the Master programme “Economics & Journalism”. Müller is also co-head of the multidisciplinary research collaboration Dortmund Center for Data-based Media Analysis (DoCMA).

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## Solutions for Module 8:

### Exercise 4:

The relation between the freedom of the press and the prevalence of **corruption** seems to be the following: Where media freedom is rather low, **corruption** has more scope to be active. By contrast, countries that foster the freedom of the press, experience less **corruption**. However, one must add that there are many other factors influencing the progression of **corruption** besides the degree of press freedom in a country, including the following: the level of governmental and societal awareness of corruptive activities, control of power, institutional setting, functioning rule of law, efficient judiciary as well as other basic democratic rights such as freedom of assembly and the right to demonstrate.

### Exercise 5:

The ESSF Formula puts forward an **innovative system of economic news values** that journalists can employ to pursue independent reporting on economic policy, business and finance. As you have previously learned, traditional news values do not capture what's necessary to cover those topics adequately.

It's not far-fetched to conclude that economic journalism should borrow the **goal of welfare maximisation** (part of welfare economics) as its ultimate objective from economic theory. Welfare is a somewhat open concept. It can be concretised by filling in purely materialistic objectives, such as boosting current income or consumption, but also by considering long-term altruistic motives, such as slowing down climate change or securing prosperity for future generations.

Translating the economic concept of welfare into journalistic categories, economic journalism should be guided by the ESSF Formula – **efficiency, stability, sustainability, and fairness**. This novel approach is meant to provide a set of news values for economic journalism (Müller, forthcoming). **When the ESSF Formula is violated, there is a case for a story. When it is badly violated, it should be a major one.** The ESSF Formula strives to capture how journalists (should) think about economic developments, which aspects should be considered, which current and future trade-offs need to be borne in mind, and which potential remedies are at hand – that is, **how a particular issue could be framed**.

The ESSF Formula implies judgements: **efficiency means there shall be no waste of economic resources**, the more income and growth the better, all else being equal. **Stability entails the absence of erratic movements of markets** that obstruct their smooth functioning and may lead to economic and social disruptions. **Sustainability purports that the destructive overuse of natural resources is undesirable**, as it leads to future scarcities. **Fairness rules out exploitation and overreach of any kind** resulting from the asymmetric distribution of wealth, power, or information.

**The ESSF Formula is inspired by economic policy recommendations** like the UN Global Compact (n.d.), the work on Well-being indicators at the Organisation for Economic Co-operation and Development (OECD) (n.d.), the Stiglitz report on social progress commissioned by former French President Nicolas Sarkozy (Stiglitz et al., 2009), or the W3 Formula proposed by a group of experts to the German parliament (Schmidt & aus dem Moore, 2014). The ESSF Formula is also related to EU Cohesion Policy priorities such as enhancing competitiveness, social inclusiveness and decarbonisation.

All these conceptual efforts stress that the goals of achieving balanced economic growth and an efficient allocation of resources must be complemented with social and environmental considerations. **Both media outlets and individual journalists may stress a variety of aspects, depending on their respective political bent:** a left-leaning publication may put more weight on fairness and efficiency (high employment, growth), a conservative one will stress efficiency and stability, a greenish one



sustainability and fairness. So, even if everybody accepts the ESSF Formula, there is still plenty of room for disagreement.

It should be noted that **the ESSF Formula focuses on outcomes, not principles**. It is open to many ways of doing business and economic policy, whether private or public, financial market-driven or government-driven, corporatist or individualistic. What matters are the respective arrangement's results.

Together the four categories constitute a coordinate plane covering various aspects of welfare. When inefficiency is pushed back, when instability is avoided, when sustainability is provided for, and injustices are thwarted, conditions are laid for a society to prosper in a pacified manner over the long-term. Economic journalism should highlight slippages from these goals and provide sufficient transparency so that they can be worked out.

### **Exercise 6:**

*Hey Sebastian,*

*I am happy to give you a short introduction on the economic fundamentals of EU Cohesion Policy. When we are talking about EU Cohesion Policy, we are always talking about a great amount of money. We are now, as you know, in the funding period 2021–2027. In these seven years alone, the European Union wants to invest €392 billion in EU Cohesion Projects. This makes up one third of the total EU budget. That's quite a lot, isn't it?*

*Some EU member states receive substantial funding. In countries like Croatia, Lithuania or Hungary it can amount to up to 3.0% of the countries' gross national incomes. Differences in the degree of financial contributions by the European Union originate from considerable regional disparities in Europe, for instance, with respect to economic activity and **population density**. The economic centre of the European Union is in Central-Northern Europe, whereas peripheral regions in Eastern and Southern Europe are rather poor. This is due to **gravitational effects**.*

*As **economic integration** in the European Union progresses, densely populated metropolitan areas are favoured the most. They find it easy to attract companies and workforce as **demand** and **productivity** in these regions are already high. In general, there are strong market forces at play. You can see urban **agglomerations** all over Europe, but especially in the central part of the European Union. By supporting less developed regions in the establishment of necessary infrastructure, education and other important requirements, EU Cohesion Policy wants to enable them to take part in **market integration** as well.*

*For 30 years now, the **European single market** has been one of the world's biggest single market areas. It is based on the "**four freedoms**": the free movement of goods, services, capital and people. These conditions lead to **spillover effects** which favour the more advanced regions and countries of the European Union again. However, you know that the main goal of EU Cohesion Policy is to promote an economic, social, and territorial alignment of regions, so that all EU citizens can enjoy the same standard of living. In this respect, you could therefore ask yourself: How **efficient** is EU Cohesion Policy really? Researchers come to mixed results with some seeing substantial improvement potential in the use of EU Funds.*

*And, Sebastian, we as journalists can make a difference here. We can act as correctives and provide transparency in the implementation of EU Cohesion Policy. If we are not reporting critically, we cannot reveal potential wrongdoings like mismanagement, **corruption** and **fraud** of EU Funds. To prevent these kinds of malpractices, (economic) journalism needs to be forward-looking. Currently,*

*European topics tend to receive too little attention and if these topics also deal with economic contexts, it is barely possible to generate any attention. But that is the challenge we accept, Sebastian!*

**Exercise 7:**

1. This statement is false. Traditional news values do not capture what's necessary to cover economic topics like economic policy, business, finance, or EU Cohesion Policy.
2. This statement is correct.
3. This statement is false. The ESSF Formula translates the economic concept of welfare into four journalistic categories.
4. This statement is false. The acronym ESSF stands for efficiency, stability, sustainability, and fairness.
5. This statement is correct.
6. This statement is correct.
7. This statement is correct.
8. This statement is false. Media outlets and journalists will probably stress a variety of aspects, depending on their respective political bent.
9. This statement is false. It's the other way around. The ESSF Formula focuses on outcomes, not principles. It is open to many ways of doing business and economic policy. It is not decisive whether one believes in the market or the state, whether one shares "socialist" or "neoliberal" beliefs, or whether one supports a more federal EU or a stronger role of the individual member states. What matters are the respective arrangement's results. The ESSF Formula is about achieving the best outcomes under current conditions.
10. This statement is correct.

# Module 9 – Research and Investigate EU Cohesion Policy Issues

## Basic Information

Module number	9
Module title	Research and Investigate EU Cohesion Policy issues
Duration/study load	8 hours
Keywords	Economic journalism; Economic reporting; Efficiency; ESSF Formula; Experts; Fairness; Research; Stability; Stakeholders; Sustainability
Learning outcomes	<p>At the end of the module, you should be able...</p> <p>...to identify relevant issues and key sources by applying the ESSF Formula in journalistic research</p> <p>...to detect deviations from the four journalistic categories of the ESSF Formula</p> <p>...to discuss shortcomings and improvement potentials in media coverage of EU Cohesion Policy issues</p> <p>...to employ the ESSF Formula for approaching (own) journalistic stories related to EU Cohesion Policy</p>
Description	<p>Module 9 trains you to research and investigate economic issues related to EU Cohesion Policy by putting the theoretical insights gained in Module 8 into practice.</p> <p>Module 9 starts with a recap of the level of (economic) media coverage of EU Cohesion Policy as well as the ESSF Formula. In the next step, you will go through the process of journalistic research into economic topics using the example of the construction of a sports hall in a town on the edge of a nature reserve financed by EU Cohesion Policy. Throughout this journalistic research process, you detect violations of the ESSF Formula, and discuss shortcomings and improvement potentials in media coverage of EU Cohesion Policy as a whole. Finally, you will write an essay about a relevant journalistic story you would like to pursue related to the above-mentioned example of the newly constructed sports hall.</p> <p>Module 9 pursues a hands-on approach with extended exercises, so that you can apply your acquired skills, particularly from Module 8, to report on a specific economic topic related to EU Cohesion Policy.</p>

Sequentiality	Module 9 is interlinked with Module 8. In Module 8, you deal with theoretical insights into economic concepts and reporting which are put into practice in Module 9. Thus, Module 8 should be completed before working on Module 9.
Author contact	Henrik Müller, Richard Brandt TU Dortmund, Institute of Journalism <a href="mailto:henrik.mueller@tu-dortmund.de">henrik.mueller@tu-dortmund.de</a> / <a href="mailto:richard.brandt@tu-dortmund.de">richard.brandt@tu-dortmund.de</a>

## Glossary

<p>Agglomeration</p>	<p>An <b>agglomeration</b> is a large group of many different things collected or brought together.</p> <p>Source: <u>Cambridge Dictionary, n.d.</u></p>
<p>Agglomeration economy</p>	<p>An <b>agglomeration economy</b> is an external economy of scale brought about by the massing of a population in one place. As the population of a town or city increases, a more complex infrastructure is possible and a greater division of labour can be achieved than in a smaller settlement. The larger the settlement, the more likely it is to have a full range of transport, shopping, cultural and health facilities.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 9</u></p>
<p>Capacity</p>	<p><b>Capacity</b> refers to the maximum output that a firm or an economy can produce from its existing supply of factors of production. Thus, to increase its <b>capacity</b>, a firm must enlarge its labour force or its capital stock.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 51</u></p>
<p>Cohesion Fund (CF)</p>	<p>The <b>Cohesion Fund (CF)</b> provides support to EU member states with a gross national income per capita below 90% (EU-27 average) to strengthen the economic, social and territorial cohesion of the EU. It supports investments through dedicated national or regional programmes. The <b>CF</b> mainly contributes to investments in the field of environment and trans-European networks in the area of transport infrastructure.</p> <p>Source: <u>European Commission, n.d.</u></p>
<p>Corruption</p>	<p><b>Corruption</b> is a dishonest or illegal behaviour involving a person in a position of power, for example, accepting money for doing something illegal or immoral. <b>Corruption</b> includes the abuse of entrusted power for private gain. <b>Corruption</b> erodes trust, weakens democracy, hampers economic development and further exacerbates inequality, poverty, social division and the environmental crisis.</p> <p>Source: <u>Cambridge Dictionary, n.d.</u>; <u>Transparency International, n.d.</u></p>

Crowding-out	<p><b>Crowding-out</b> refers to an alleged effect on private sector demand of an increase in public expenditure. It is argued that budget deficits will raise borrowing with the effect of increasing interest rates which will lead to a reduction in private sector investment and expenditure on consumer durables. The stimulative effect of increased government expenditure will be cancelled out by expenditure reductions in the private sector. The reduction in business investment, in the long term, will further reduce the ability of the private sector to spend. <b>Crowding-out</b> may also occur because increased government spending changes private sector expectations about the future of the economy, thereby reducing the amount of investment carried out.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, pp. 91–92</u></p>
Deadweight loss	<p><b>Deadweight loss</b> can be a measure of lost economic efficiency when the socially optimal quantity of a good or a service is not produced. The concept of <b>deadweight loss</b> is crucial to much of welfare economics, for instance, the analysis of the effects of a monopoly, of taxes and of tariffs. An example of a <b>deadweight loss</b> is a loss that occurs when a government raises taxes in order to get more money, but then loses money as a result. For example, a company that goes bankrupt because of increased taxes will stop paying taxes completely. Eventually, these forgone taxes are lost and cannot be used for the society's benefit. Thus, they represent a <b>deadweight loss</b> in terms of social welfare.</p> <p>Source: <u>Cambridge Dictionary, n.d.; Routledge Dictionary of Economics, 1992, p. 95</u></p>
Demography	<p><b>Demography</b> is the study of the size and composition of human populations, particularly births, deaths and migration. Both historical recording and projections of future populations are calculated to provide the basis for economic and social planning.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 101</u></p>

(Economic) efficiency	<p><b>Economic efficiency</b> is when all goods and factors of production in an economy are distributed or allocated to their most valuable uses and waste is eliminated or minimised. A system is considered <b>economically efficient</b> if the factors of production are used at a level at or near their capacity.</p> <p>In contrast, a system is considered economically inefficient if available factors are not used to their capacity. Wasted resources and deadweight losses may cause economic inefficiencies.</p> <p><b>Efficiency</b>, as part of the ESSF Formula, means there shall be no waste of economic resources, the more income and growth the better, all else being equal.</p> <p>Source: <a href="#">Investopedia, 2020</a>; <a href="#">Müller, 2023</a></p>
(Economic) growth	<p><b>Economic growth</b> is the growth in the total, or per capita, output of an economy, often measured by an increase in real gross national product, and caused by an increase in the supply of factors of production or their productivity. Ecologists and others concerned about the scarcity of natural resources have advocated zero <b>economic growth</b> rates as appropriate for the late twentieth century.</p> <p>Source: <a href="#">Routledge Dictionary of Economics, 1992, p. 118</a></p>
Economic integration	<p><b>Economic integration</b> is the joining together of economic activities, especially the trade of several countries. This can take different forms, including free trade areas, customs unions, common markets and federations of national economies. Different forms of integration can be distinguished by the extent to which individual national governments retain independence in decision-making.</p> <p>See also <b>market integration</b></p> <p>Source: <a href="#">Routledge Dictionary of Economics, 1992, p. 118</a></p>
(Economic) resource	see <b>Factor of production</b>
(Economic) waste	<p><b>Waste</b> is the undesired costs resulting from a particular economic activity. <b>Waste</b> as well refers to transactions which do not create wealth, for instance, rent-seeking behaviour. <b>Waste</b> can also occur because of the peculiar nature of certain types of economic organisation, for instance, barter economies <b>waste</b> time through the need of buyers and sellers to search for each other; competitive economies are wasteful in needing advertising and other selling expenditures.</p> <p>Source: <a href="#">Routledge Dictionary of Economics, 1992, p. 438</a></p>



<p>ESSF Formula</p>	<p>The <b>ESSF Formula</b> puts forward an innovative system of economic news values that journalists can employ to pursue independent reporting on economic policy, business and finance. Translating the economic concept of welfare into journalistic categories, economic journalism should be guided by the <b>ESSF Formula</b> – efficiency, stability, sustainability, and fairness.</p> <p>Source: <u>Müller, 2023</u></p>
<p>European Regional Development Fund (ERDF)</p>	<p>The <b>European Regional Development Fund (ERDF)</b> aims to strengthen economic, social and territorial cohesion in the EU by correcting imbalances between its regions. In the 2021-2027 programming period, it enables investments in a smarter, greener, more connected and more social Europe that is closer to its citizens. It is complemented by the Cohesion Fund (CF) which supports investment in 15 member states in transport, the environment, energy efficiency and renewable energy.</p> <p>Source: <u>European Commission, n.d.</u></p>
<p>European single market</p>	<p>The <b>European single market</b>, sometimes also called the internal market, is one of the cornerstones of the European Union (EU). It refers to the free movement of people, goods, services and capital within the EU, the so-called “four freedoms” laid down in the Treaty of Rome. This has been achieved by eliminating barriers and simplifying existing rules so that everyone in the EU can profit from direct access to all other member states.</p> <p>The enabling instrument for the single market was the Single European Act (SEA), which came into force in July 1987. Among other things it called for:</p> <ul style="list-style-type: none"> <li>● extending the powers of the Community in some policy areas (social policy, research, environment);</li> <li>● gradually establishing the <b>European single market</b> over a period up to the end of 1992, by means of a vast legislative programme involving the adoption of hundreds of directives and regulations; and</li> <li>● making more frequent use of majority voting in the Council of Ministers.</li> </ul> <p>EU policies in the areas of transport, competition, financial services and consumer protection underpin the <b>European single market</b>.</p> <p>Source: <u>Eurostat Statistics Explained, 2019</u></p>

European Social Fund (ESF) / European Social Fund Plus (ESF+)	<p>The <b>European Social Fund Plus (ESF+)</b> is the European Union’s main instrument for investing in employment, social, education and skills policies, including structural reforms in these areas. The <b>ESF+</b> brings together four funding instruments: the <b>European Social Fund (ESF)</b>; the Fund for European Aid to the most Deprived (FEAD); the Youth Employment Initiative; and the European Programme for Employment and Social Innovation (EaSI). The <b>ESF+</b> aims to strengthen Europe’s social dimension, by putting the principles of the European Pillar of Social Rights into practice.</p> <p>Source: <a href="#">European Commission, n.d.</a></p>
Externality	<p>An <b>externality</b> describes the benefit or cost to society or another person of a private action (for instance, production or consumption); a third-party effect. Since Pigou’s discussion of the distinction between social and private cost, it has been a central concept of welfare economics. “Internalizing an <b>externality</b>”, in the case of an external cost, can be achieved by a government levying taxes equal to the difference between a private cost and a social cost.</p> <p>Source: <a href="#">Routledge Dictionary of Economics, 1992, p. 143</a></p>
Factor of production	<p>A <b>factor of production</b>, also called (economic) resource, is an input which produces a good or service. Before the eighteenth century it was common to classify all factors as either land and labour; later, capital and the entrepreneur were considered as separate <b>factors of production</b>. In many modern economics models, only labour and capital are included as <b>factors of production</b>. Capital, in this case, is a broad term that can describe anything that confers value or benefit to its owners, such as a factory and its machinery, intellectual property like patents, or the financial assets of a business or an individual.</p> <p>Source: <a href="#">Hargrave, 2022</a>; <a href="#">Routledge Dictionary of Economics, 1992, p. 144</a></p>
Fairness	<p><b>Fairness</b>, as part of the ESSF Formula, rules out exploitation and overreach of any kind resulting from the asymmetric distribution of wealth, power, and information.</p> <p>Source: <a href="#">Müller, 2023</a></p>
Favouritism	<p><b>Favouritism</b> is the unfair support shown to one person or group, especially by someone in authority.</p> <p>Source: <a href="#">Cambridge Dictionary, n.d.</a></p>

<p>Fraud</p>	<p><b>Fraud</b> refers to an act of deceitful accounting or misappropriation of funds. Simply put, <b>fraud</b> is the crime of getting money by deceiving people. The intentional action results in the victim suffering a loss and/or the perpetrator achieving a gain. <b>Fraud</b> is a criminal offence. In short: <b>Fraud</b> is a deliberate act of deception intended for personal gain or to cause a loss to another party.</p> <p>An irregularity is an act which doesn't comply with EU rules and which has a potentially negative impact on EU financial interests, but which may be the result of genuine errors committed both by beneficiaries claiming funds and by the authorities responsible for making payments. If an irregularity is committed deliberately, however, it's <b>fraud</b>.</p> <p>Source: <u>Cambridge Dictionary, n.d.</u>; <u>OLAF – European Anti-Fraud Office, n.d.</u>; <u>Routledge Dictionary of Economics, 1992, p. 158</u></p>
<p>Gross domestic product (GDP)</p>	<p><b>Gross domestic product (GDP)</b> is the total output of goods and services produced within a given country in a particular time period. It is equal to the sum of the value added by each industry, net of all inputs, including imported intermediate goods: this is equal to the factor incomes of all persons engaged in domestic production. <b>Gross domestic product</b> together with net property income from abroad, constitutes gross national product.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 175</u></p>
<p>Gross domestic product (GDP) per capita</p>	<p><b>Gross domestic product (GDP) per capita</b> is an economic metric that breaks down a country's economic output per person. Economists use <b>GDP per capita</b> to determine how prosperous countries are based on their economic growth. <b>GDP per capita</b> is calculated by dividing the GDP of a nation by its population. Countries with the higher <b>GDP per capita</b> tend to be those that are industrial, developed countries.</p> <p>Source: <u>Investopedia, 2023</u></p>
<p>Gross national income (GNI)</p>	<p>Gross National Income (GNI) is the total amount of money earned by a nation's people and businesses. It is used to measure and track a nation's wealth from year to year. The number includes the nation's gross domestic product (GDP) plus the income it receives from overseas sources.</p> <p>Source: <u>Investopedia, 2023</u></p>

<p>Gross national product (GNP)</p>	<p><b>Gross national product (GNP)</b> is an estimate of the total value of all the final products and services turned out in a given period by the means of production owned by a country's residents. <b>GNP</b> is commonly calculated by taking the sum of personal consumption expenditures, private domestic investment, government expenditure, net exports, and any income earned by residents from overseas investments, then subtracting income earned by foreign residents. Net exports represent the difference between what a country exports minus any imports of goods and services.</p> <p><b>GNP</b> is related to another important economic measure called gross domestic product (GDP), which takes into account all output produced within a country's borders regardless of who owns the means of production. <b>GNP</b> starts with GDP, adds residents' investment income from overseas investments, and subtracts foreign residents' investment income earned within a country.</p> <p><b>GNP</b> is used as a crude measure of economic welfare. Its growth can be divided into real growth and growth due to inflation.</p> <p>Source: <u>Investopedia, 2023; Routledge Dictionary of Economics, 1992, p. 175</u></p>
<p>Innovation</p>	<p><b>Innovation</b> refers to the application of an invention to a process of production or the introduction of a new product. A method of measuring an <b>innovation</b> is by estimating the extent to which an industry uses the new process or product. <b>Innovations</b> are based on the results of new technological developments, new technology combinations, or the use of other knowledge, acquired by an enterprise. The <b>innovations</b> may be developed by the innovating enterprise or by another enterprise.</p> <p>A <b>product innovation</b> is the market introduction of a new or a significantly improved good or service.</p> <p>A <b>process innovation</b> is the implementation of a new or significantly improved production process, distribution method or support activity for goods or services.</p> <p>Source: <u>Eurostat Statistics Explained, 2023; Routledge Dictionary of Economics, 1992, pp. 200–201</u></p>

Lobbying	<p><b>Lobbying</b> refers to the phenomenon of interest groups trying to influence political decisions on their behalf. In other words: <b>Lobbying</b> is the activity of trying to persuade someone in authority, usually an elected member of a government, to support laws or rules that give your organisation or industry an advantage. Historically, <b>lobbying</b> has its origins in the term 'lobby', which in the UK and the USA refers to the reception hall of parliament. Representatives of interest groups who did not have access to the chamber could meet politicians in the lobby to promote their interests.</p> <p>Source: <u>Cambridge Dictionary, n.d.</u>; <u>Federal Agency for Civic Education, n.d.</u></p>
Managing authority	<p>A designated <b>managing authority</b> provides information on the programme, selects projects and monitors implementation.</p> <p>Source: <u>European Commission, n.d.</u></p>
Market forces	<p><b>Market forces</b> manifest themselves in the demand for and supply of factors of production and the goods and services produced by them. <b>Market forces</b> are the determinants of prices, investment and output in competitive markets.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, pp. 254–255</u></p>
Market integration	<p><b>Market integration</b> is a situation in which separate markets for the same product become one single market, for example, when an import tax in one of the markets is removed.</p> <p>See also <b>economic integration</b></p> <p>Source: <u>Cambridge Dictionary, n.d.</u></p>
Nomenclature of territorial units for statistics (NUTS)	<p><b>NUTS</b> is an acronym for the French term “<b>Nomenclature des unités territoriales statistiques</b>”, in English “<b>Nomenclature of territorial units for statistics</b>”. The <b>NUTS</b> classification is a system by which European economic regions are divided up for two reasons: (i) statistical purposes and (ii) facilitated socio-economic analyses of the regions. In total, there are three classification levels: NUTS 1, NUTS 2 and NUTS 3. Framing and application of EU regional policies happens mainly on the NUTS 2 level. More information on the <b>NUTS</b> classification can be found <u>here</u>.</p> <p>Source: <u>Eurostat, n.d.</u></p>

<p>Opportunity cost(s)</p>	<p><b>Opportunity costs</b> describe the value of the alternative foregone by choosing a particular activity. A major example of this is the choice of work rather than leisure, in which case the <b>opportunity cost</b> of working is the amount of leisure sacrificed. Such a cost arises from the scarce nature of resources. The economist uses <b>opportunity cost</b> as the central meaning of cost. The much-used expression, “there’s no such thing as a free lunch” reflects the fact that all goods and services have their <b>opportunity costs</b>.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 296</u></p>
<p>(Political) clientelism</p>	<p><b>(Political) clientelism</b> can be defined as giving material goods in return for electoral support, or the exchange of votes for favours, over a long period of time, among actors with asymmetric power. Politicians would reward a portion of their supporters with public resources in return for electoral support. Contrary to corruption, the <b>clientelistic</b> exchange is done in the open and contravenes neither a legal provision nor a custom. To the extent that such an allocation breaches a legal provision and is done secretly, <b>clientelism</b> turns into corruption, the exchange occurring in an illegal market. If the exchange goes counter to public sentiments, it still qualifies as <b>clientelism</b> although the public frowns upon it.</p> <p>Source: <u>United Nations University World Institute for Development Economics Research, n.d.; Varese, n.d.</u></p>
<p>Potential output / productive capacity</p>	<p><b>Potential output</b>, also referred to as <b>productive capacity</b>, is the maximum output of an economy which will be achieved if all of its factors of production are fully employed. Actual output is often much less. <b>Productive capacities</b> are the productive resources, entrepreneurial capabilities and production linkages that together determine a country's ability to produce goods and services that will help it grow and develop.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 317; United Nations Conference on Trade and Development (UNCTAD), n.d.; UN Economic and Social Commission for Western Asia (ESCWA), n.d.</u></p>

<p>Preferences</p>	<p>In economic theory, <b>preferences</b> are the drivers of how people choose, subject to constraints, and therefore cultural differences might be understood as partly reflecting differences in <b>preferences</b>. While economic theory abstracts away from many aspects of these, certain <b>preferences</b> – for example, those over risk, time, and various social <b>preferences</b> – are explicitly modelled because they are relevant for almost all economic decisions.</p> <p>See also <b>rational behaviour</b></p> <p>Source: <u>Centre for Economic Policy Research (CEPR), 2018</u></p>
<p>Principle of Additionality (in EU Funding)</p>	<p>The <b>Principle of Additionality</b> refers to the fact that support from the EU should not crowd out national expenditure on the same investment priorities. If this principle is not met and EU support is not fully additional, the actual contribution of EU Funds to the development prospects of the supported territories might be lower than the potential impact of the EU Funds.</p> <p>Source: <u>Halasz, 2018</u></p>
<p>Principle of Subsidiarity (in EU Funding)</p>	<p>The <b>Principle of Subsidiarity</b> aims at determining the level of intervention that is most relevant in the areas of competences shared between the EU and the EU countries. This may concern action at European, national or local levels. In all cases, the EU may only intervene if it is able to act more effectively than EU countries at their respective national or local levels. The <b>Principle of Subsidiarity</b> also aims at bringing the EU and its citizens closer by guaranteeing that action is taken at local level where it proves to be necessary. However, the <b>Principle of Subsidiarity</b> does not mean that action must always be taken at the level that is closest to the citizen.</p> <p>Source: <u>EUR-Lex, 2015</u></p>
<p>Productive potential</p>	<p><b>Productive potential</b> is the maximum growth rate of a country, extrapolated from past trends. It is measured by considering both the growth rates of the supply of factors of production (labour and capital) and the productivity of those factors.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 327</u></p>



<p>Productivity</p>	<p><b>Productivity</b>, in economics, measures output per unit of input, such as labour, capital, or any other resource. It is often calculated for the economy as a ratio of gross domestic product (GDP) to hours worked. At the corporate level, <b>productivity</b> is a measure of the efficiency of a company's production process, it is calculated by measuring the number of units produced relative to employee labour hours or by measuring a company's net sales relative to employee labour hours. Simply put, <b>productivity</b> is the amount of real output produced by one unit of a factor input, for example, the number of cars assembled by one worker in a year.</p> <p>Source: <a href="#">Eurostat Statistics Explained, 2013</a>; <a href="#">Kenton, 2023</a></p>
<p>Rational behaviour</p>	<p><b>Rational behaviour</b> refers to a decision-making process that is based on making choices that result in the optimal level of benefit or utility for an individual. These decisions provide people with the greatest benefit or satisfaction given the choices available. The assumption of <b>rational behaviour</b> implies that people would rather take actions that benefit them versus actions that are neutral or harm them. Most classical economic theories are based on the assumption that all individuals taking part in an activity are behaving rationally. <b>Rational behaviour</b> may not involve receiving the most monetary or material benefit, because the satisfaction received could be purely emotional or non-monetary.</p> <p>For example, while it is likely more financially beneficial for an executive to stay on at a company rather than retire early, it is still considered <b>rational behaviour</b> for her to seek an early retirement if she feels the benefits of retired life outweigh the utility from the paycheck she receives. The optimal benefit for an individual may involve non-monetary returns.</p> <p>See also <b>preferences</b></p> <p>Source: <a href="#">Hayes, 2020</a></p>
<p>Regional policy</p>	<p><b>Regional policy</b> comprises measures to reduce the imbalance in prosperity between the regions of a particular country, particularly between the region around the capital city and the peripheral provinces. Many countries have used incentives to encourage the location of expanding industries in the depressed regions and to reduce the population density of major cities. <b>Regional policies</b> are measured by the number of jobs created in depressed regions and by the extent of convergence in interregional incomes, unemployment rates and rates of output growth. <b>Regional policy</b> is most active in times of fast national economic growth as it is then easier to finance assistance to regions.</p> <p>The EU invests locally through its <b>regional policy</b>. Addressed to all EU regions and cities, it contains measures to boost economic growth and jobs and improve quality of life through strategic investment.</p> <p>Source: <a href="#">European Union, n.d.</a>; <a href="#">Routledge Dictionary of Economics, 1992, p. 345</a></p>

<p>Rent-seeking</p>	<p><b>Rent-seeking</b> is an economic concept that occurs when an entity seeks to gain added wealth without any reciprocal contribution of productivity. Typically, it revolves around government-funded social services and social service programs. The word “rent” is based on the economic definition of the term, which is defined as economic wealth obtained through shrewd or potentially manipulative use of resources. A more colloquial way of describing this behaviour is “privilege seeking.” An example of <b>rent-seeking</b> is when a company lobbies the government for grants, subsidies, or tariff protection. <b>Rent-seeking</b> comes in many forms from lobbying to donating funds.</p> <p>Source: <u>Majaski, 2021</u></p>
<p>Shared management (of EU Funds)</p>	<p>In <b>shared management</b>, both the European Commission and national authorities in member states, such as ministries and public institutions, are in charge of running a particular programme. Around 70% of EU programmes are run this way.</p> <p>For instance, if you are a farmer anywhere in the EU, and have a project to start growing organic tomatoes, you would be eligible to apply for funds under the Common Agricultural Policy (CAP). For that, you would have to go through your country's Ministry of Agriculture, or an equivalent institution, which would be in charge of managing the funds for your project on behalf of the EU.</p> <p>The member states' administrations (at national, regional and local level) choose which projects to finance and take responsibility for day-to-day management. Working together with the member states, the Commission makes sure that the projects are successfully concluded, and the money is well spent.</p> <p>Source: <u>European Commission, n.d.</u></p>
<p>(Social) welfare</p>	<p><b>Social welfare</b> is the economic well-being of a society as a whole, often measured in terms of the total volume of goods and services becoming available to it over a given period, that is, real income. There is much dispute about an appropriate measure as national income accounting does not cover all goods and bads of an economy and total income measure ignores income distribution. As changes in <b>social welfare</b> are used to judge the efficacy of economic policies, a variety of tests have been used to see whether there has been an unambiguous increase in <b>welfare</b>. Much of welfare economics is concerned with this difficult problem which reflects the value-loaded nature of many <b>welfare</b> discussions.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 381</u></p>

Stability	<p><b>Stability</b>, as part of the ESSF Formula, entails the absence of erratic movements of markets that obstruct their smooth functioning and may lead to economic and social disruptions.</p> <p>Source: <u>Müller, 2023</u></p>
Stakeholder mapping	<p><b>Stakeholder mapping</b> is the process of identifying key stakeholders (that is, individuals or groups with a vested interest in a project) and understanding their relationships with each other and the project. It's important to map the stakeholders because it helps you understand who they are, what they want, and how they should be involved. Additionally, <b>stakeholder mapping</b> can help to identify potential areas of conflict and misunderstanding.</p> <p>Source: <u>Kitch, 2023</u></p>
Sustainability	<p><b>Sustainability</b>, as part of the ESSF Formula, purports that the destructive overuse of natural resources is undesirable, as it leads to future scarcities.</p> <p>Source: <u>Müller, 2023</u></p>
Trade barrier	<p>A <b>trade barrier</b> is something such as an import tax or a limit on the amount of goods that can be imported that makes international trade more difficult or expensive.</p> <p>Source: <u>Cambridge Dictionary, n.d.</u></p>
Transaction costs	<p><b>Transaction costs</b> are the running costs of an economic system; the cost of effecting an exchange or other economic transaction. These costs, which vary in magnitude from one economic system to another, include those of negotiating and drafting contracts and the subsequent costs of adjusting for misalignments. This concept is fundamental to the analysis of economic regulation, labour market hiring, vertical integration and competition in the capital market.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, p. 416</u></p>

Wealth	<p><b>Wealth</b> refers to the stock of assets held by a person, a firm or a country. <b>Wealth</b> is measured at a particular date, for instance, 31 December, and not over a period as is the case with income. <b>Wealth</b> statistics are subject to much error because of valuation problems and owners' concealment, especially if <b>wealth</b> and inheritance taxes are in force. Many forms of income, for instance, rent and profits, are a return to the <b>wealth</b> a person holds.</p> <p>National <b>wealth</b>, in turn, refers to the total assets owned by the residents of a country on a particular day.</p> <p>Source: <u>Routledge Dictionary of Economics, 1992, pp. 281, 438</u></p>
Welfare economics	<p><b>Welfare economics</b> is the study of how the allocation of resources and goods affects social welfare. This relates directly to the study of economic efficiency and income distribution, as well as how these two factors affect the overall well-being of people in the economy.</p> <p>In practical terms, <b>welfare economists</b> seek to provide tools to guide public policy to achieve beneficial social and economic outcomes for all of society. However, <b>welfare economics</b> is a subjective study that depends heavily on chosen assumptions regarding how welfare can be defined, measured, and compared for individuals and society as a whole.</p> <p>In short: <b>Welfare economics</b> is the branch of economics which sets out the rules for maximising the welfare of society by considering both the size of social welfare and its distribution.</p> <p>Source: <u>Investopedia, 2022; Routledge Dictionary of Economics, 1992, p. 439</u></p>

## Acronyms

CCI	Chamber of Commerce and Industry
CEPR	Centre for Economic Policy Research
CF	Cohesion Fund
CoR	European Committee of the Regions
COVID-19	Coronavirus Disease 2019
CTO	Chief Technology Officer
DIW	Deutsches Institut für Wirtschaftsforschung Berlin (in English: German Institute for Economic Research)
DW	Deutsche Welle
EC	European Commission
EP	European Parliament
EPRS	European Parliamentary Research Service
ERDF	European Regional Development Fund
ESF	European Social Fund
ESSF Formula	efficiency, stability, sustainability, fairness
EU	European Union
EU-27	The 27 European Union member countries
FTM	Follow the money
GDP	Gross domestic product

GNI	Gross national income
GNP	Gross national product
IW	Institut der deutschen Wirtschaft Köln (in English: German Economic Institute)
MC	Monitoring committee
MEP	Member of the European Parliament
NGO	non-governmental organisation
NUTS	Nomenclature des unités territoriales statistiques (in English: Nomenclature of territorial units for statistics)
n.d.	no date
RCI	Regional Competitiveness Index
REGI	European Parliament Committee on Regional Development
SMEs	small and medium-sized enterprises
TED	Tenders Electronic Daily
UK	United Kingdom
USA	United States of America

## About this module

Investing money can be a tough business. It involves various interests and potentially also mismanagement and misuse. As you have already learned in Module 8, the European Union (EU) [plans to spend almost €400 billion](#) in the funding period 2021–2027 (European Commission, n.d.). The use of this money must be constantly scrutinised!



Figure 113: Are EU Funds spent efficiently; Source: Pixabay

Module 8 has taught you about the economic foundations of EU Cohesion Policy as well as the necessities of economic journalism and the new concept of the **ESSF Formula**. This knowledge will help you, while you work your way through Module 9. As in Module 8, the central terminology used in this module is emphasised **in bold letters** in this module, so that you can check the terminology with your word register from Module 8 and add new terms if necessary.

In Module 9, you apply your acquired skills in practice and have the chance to develop your own journalistic story about a topic related to EU Cohesion Policy. The guiding questions you should ask yourself as a journalist throughout this module remain the same as in Module 8: Is the money provided by EU Cohesion Policy really spent on the right projects? Do certain projects have a noticeable effect on a region's development and **growth**? Who receives the benefits? And what are the potential risks for the mismanagement of EU Funds?

The new aspect in Module 9 is that you will also think about and find answers to the following two questions: How can you assess the impact of EU Cohesion Policy? And are there (hard) criteria that are suitable for assessing the effects of EU Cohesion Policy Investments?

To find reliable answers, Module 9 guides you through the seven stages of journalistic research into economic topics. The research process will prepare you to ask and investigate the right questions at each step of the EU Cohesion Funding Process – from the selection of projects over their realisation to the final evaluation. The **ESSF Formula** serves as an auxiliary framework to find the relevant and potentially missing angles and voices in reporting about EU Cohesion Policy. Once you have completed Module 9, you are ready to cover your own journalistic stories dealing with economic issues related to EU Cohesion Policy. So, what are you waiting for?

## Introduction to the story of this module



Figure 114: Looking for the next *ECONOMIX* story; Source: Pixabay

You should put yourself in the following scenario during this module: You are still working as an editor for the European economic newspaper *ECONOMIX*. In the newsroom, you are now mainly responsible for topics related to EU Cohesion Policy. A new issue is due. You are searching for your next story, but currently face some difficulties.

That's why you first want to get an impression of existing media coverage of EU Cohesion Policy published by other media outlets to find out about the current status of reporting.



## Analysing economic media coverage of EU Cohesion Policy

### Input: Underreported, but not unimportant

Finding newsworthy angles and stories is a constant challenge in the life of a journalist. Sometimes there are plenty of topics right in front of your eyes, at other times it is hard to even find one single interesting story. To make matters worse, topics dealing with either or both the European Union and economics, as is the case with EU Cohesion Policy, rarely make it onto the news agenda. The rather low level of media coverage provides room for plenty of [myths about EU Cohesion Policy](#) (European Commission, n.d.). If you would like to learn more about the underlying reasons for this low media coverage, please consult Module 6 and Module 8.



Figure 115: Discover the relevant topics;  
Source: Pixabay

What can generally be stated is that economic and European issues tend to be underreported. There is little public scrutiny. However, these topics are critically relevant, and journalists need to draw the public's attention to them.

### Remembering the ESSF Formula

#### Recap: The ESSF Formula



Figure 116: Video – Remembering the ESSF Formula; Source: TU Dortmund University/ own production

The **ESSF Formula** that you came across in Module 8 can be a great support in finding relevant topics and stakeholders to talk to when reporting on EU Cohesion Policy. In this module, you will learn how to apply it for your own journalistic work. But before going into further details, it's time for a little recap of the **ESSF Formula**.

Please watch the introductory video to the **ESSF Formula** by Henrik Müller, Full Professor of Economic Policy Journalism at the Institute of Journalism at TU Dortmund University in Germany, in Module 8 again, and additionally consult the abstract on the **ESSF Formula** in Module 8.

## Input: Exemplifying the ESSF Formula

# ESSF

Figure 117: The ESSF Formula; Source: Own illustration

Reporters and editors must be able to select issues, investigate, analyse and publish them without interference from government, business or other outside influences. Thus, the four journalistic categories of **efficiency, stability, sustainability, and fairness** comprise the main essence of the **ESSF Formula**, and provide a frame of reference for journalists. As Müller explains, “economic journalists should focus on what’s inefficient, unstable, unsustainable, and unfair, and report it in a forward-looking manner” (2023, p. 149).

The categories can be specified quite quickly with the help of concrete questions journalists can ask when covering EU Cohesion Policy. Look at this example:

*Is a specific project likely to trigger additional investment, or is it just a windfall gain for the entities involved?*

Two journalistic categories of the **ESSF Formula** are violated here: Spending public money without effect equals **wasting** public funds, violating the criterion of **efficiency**. Unduly profiting individual businesses and other entities in turn runs against the notion of **fairness**.

### Exercise 1 – Exemplifying the ESSF Formula:

Now have a look at the following examples and always consider which journalistic categories of the **ESSF Formula – efficiency, stability, sustainability, and fairness** – could be violated. Choose the pertinent categories for every example. Sometimes more than one answer can be correct. The solution to this exercise can be found at the very end of this module.

1. Is the administrative burden manageable, or does it increase unproductive activities markedly, leading to deadweight losses?
2. Is a project likely to have lasting effects on regional growth, environmental quality, standards of living, or does it just have a one-off boost with limited scope, adding little to the dynamics?
3. Are there detrimental environmental and climate change aspects?
4. Are there follow-up costs to be expected, and if so, are the local authorities fit and able to cover them, or may the ensuing commitments harm the financial situation of a municipality?
5. How are regional prices going to react; is the project possibly crowding-out other activities by pushing up real-estate values or local wages? Are labour shortages in other sectors to be expected?
6. Is there sufficient personal distance between local authorities and the entrepreneurs involved, or does it reek of corruption?
7. Are the targeted EU goals in line with local requirements, or are there discrepancies suggesting that a certain project should not have applied in the first place, as it runs against a balanced ESSF assessment?

## Researching Mismanagement of EU Funds

### Input: EU Cohesion Funding Process

To be able to pursue your own journalistic story on EU Cohesion Policy for ECONOMIX, you need, initially, to get some more information on the EU Cohesion [Funding Process](#), which consists of various steps. Please read the short information on the funding process now (European Commission, n.d.).



Figure 118: How does the EU Cohesion Funding Process work?; Source: Pixabay

Around 70% of EU programmes are implemented under **shared management** between the European Commission and the member states' administrations at national, regional and local level (European Commission, n.d.). In doing so, the EC follows the **Principle of Subsidiarity**: EU Cohesion Policy should be implemented as closely as possible to EU citizens (EUR-Lex, 2015). That's the reason regional **managing authorities** select and manage EU Cohesion Projects on the ground (European Commission, n.d.). This process of implementation of concrete EU Cohesion Projects comprising the three phases of selection, realisation and evaluation of projects is particularly crucial for journalists to keep an eye on.

However, the critical journalistic research process should already start with the negotiations of the Partnership Agreements and specific [programmes](#) in the first phase of the EU Cohesion Funding Process (European Commission, n.d.). Relevant questions and points of discussion here would be the

following: In which topics or areas should EU Funds prospectively be invested? Which kinds of calls for proposals are planned and should eventually be opened? If you would like to know more about current tenders that are officially advertised throughout the European Union, please refer to the platform [Tenders Electronic Daily \(TED\)](#) (2023).

### Specifics to keep in mind

Some further aspects that are relevant to know concerning the EU Cohesion Funding Process:

- Organisations that can benefit from EU Cohesion Funding include public bodies like local and regional authorities, private sector organisations, especially small and medium-sized enterprises (SMEs), universities, associations, non-governmental organisations (NGOs) and voluntary organisations. Foreign firms with a base in the region covered by the relevant programme can also apply, provided they meet European public procurement rules ([European Commission, n.d.](#)).
- Multiple projects can be at various points simultaneously in the EU Cohesion Funding Process. For example, while one EU Cohesion Project has just been submitted to a call, another might already be approved by the **managing authorities** who are responsible for the implementation of the EU Cohesion Project, and a third project could already be in the realisation phase.
- EU Cohesion Projects are implemented through co-financing between the EU and the individual member states. The size of the EU's financial contribution depends on the classification of the region concerned (European Commission, n.d.):
  - In more developed regions with a **gross domestic product (GDP)** per capita higher than 100% of the average of the 27 EU member countries, 40–50% of investments are covered by the EU.
  - In transition regions with a **GDP per capita** between 75% and 100% of the average of the 27 EU member countries, 60–70% of investments are covered by the EU.
  - In less developed regions with a **GDP per capita** lower than 75% of the average of the 27 EU member countries, 70–85% of investments are covered by the EU ([European Commission, n.d.](#)).

However, due to exemptions introduced during the COVID-19 pandemic, the EU's financial share can sometimes be as high as 90% or more. The remaining share of the contributions must be borne by the respective EU member state.

Co-financing is essential for EU Cohesion Policy. However, sometimes the necessary (national) resources are not available or are not released because, for instance, national priorities are different.

- A common and widespread misconception is that EU Funds are to a huge extent pre-allocated to certain countries and projects prior to or at the beginning of a funding period. Rather than extensively pre-allocating EU Funds, the European Commission reimburses the **managing authorities** for their expenditures. Sometimes even more money would be available for spending than could be spent by the **managing authorities**, for instance, due to a lack of administrative capacity.

If you would like to know more about the implementation of EU Funds in your own country, please refer to the [national single portals](#) listed on the EC’s website (European Commission, n.d.).

### **Input: Seven stages of journalistic research into economic topics**

At each step of the EU Cohesion Funding Process, there are several questions for you as ECONOMIX editor to ask, various aspects to investigate and a number of people to interview.

However, journalistic research can be quite challenging, especially when journalism students are at the beginning of their journalistic training. Henrik Müller, Full Professor of Economic Policy Journalism at the Institute of Journalism at TU Dortmund University in Germany, lists four mistakes young journalism students make when they are conducting journalistic research (Müller, 2023, p. 143):

1. They tend to confront potential actors far too early in the research process. Instead of gathering evidence and talking to witnesses and “victims” (people who are affected by agents’ actions), they are inclined to ask the people who may be responsible for some undesirable situation right away. They have a hypothesis about what’s going on and the first thing they think of is: call the press secretary. Which will typically be the end of the story.
2. They tend to trust their sources to a degree that borders on naïveté. The best strategy is to remember everybody has their own agenda when talking to a reporter.
3. They tend to view social media as a representation of social reality. This notion overlooks the mechanisms of conversations on platforms and the discourse-deforming propensities of the algorithms that boost some content and rank down other voices.
4. Those students who acknowledge that they need to build a deeper understanding of the issues involved, sometimes assume that they must do basic research themselves, for instance, surveying large numbers of people. This is not only costly, but also time-consuming and thus uneconomic.

### **How to do journalistic research into economic topics properly**

For these reasons, it is of utmost importance that you develop a concrete and well-conceived research plan when you start investigating issues related to EU Cohesion Policy for ECONOMIX. Below, is a scheme that has been developed by Müller (2023, pp. 144–145). He focuses on seven stages that comprise journalistic research into economic topics. The depicted research plan should not be seen as unidirectional, but as reiterative. The small arrows in Figure 1 also indicate this aspect. Throughout the process, journalists need to follow a research objective, which means they need to set themselves goals they want to achieve. This objective can change during the research process and should be adjusted accordingly.

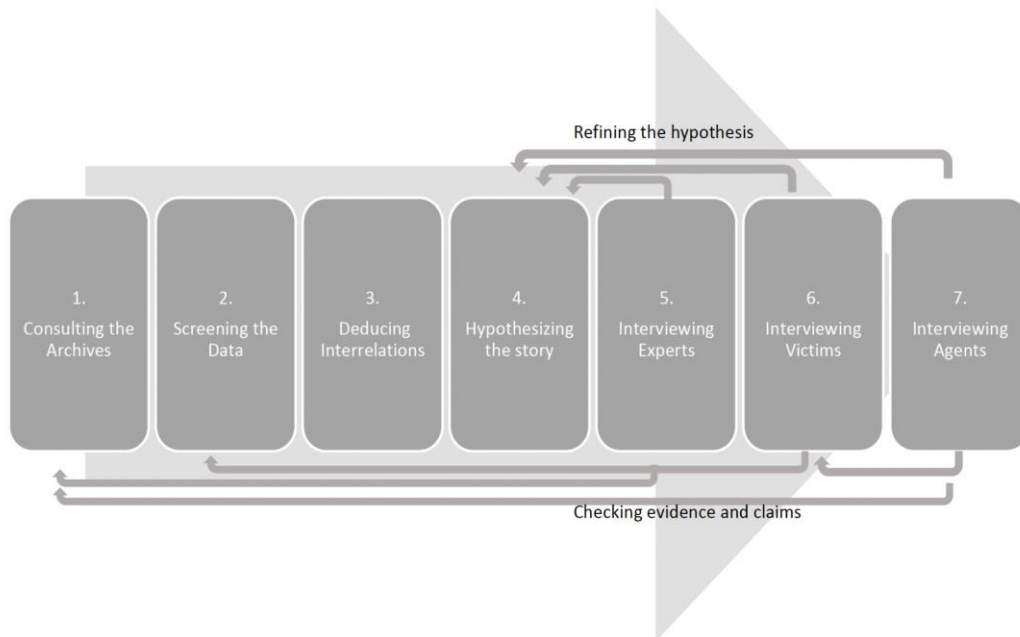


Figure 119: Seven stages of journalistic research into economic topics; Source: Müller, 2023, p. 144

1. It all starts with consulting the archives. Press databases, search engines, and the library need to be browsed to find out whether the envisioned story is original. Central question: *What's new?*
2. Step two focuses on hard facts: official data, company and national accounts, surveys, scientific studies, analysts' reports, but also possibly confidential documents or exclusively scraped data from the internet inform the reporter regarding the second central question: *What's true?*
3. Trying to deduce interrelations between facts and data helps to illuminate matters of interest behind the data. The reporter employs their knowledge and experience to get to a preliminary understanding of potential causes-consequences nexuses and responsibilities of persons or institutions, all of which are features of a narrative and thus of a comprehensive news story. Central question: *What's going on?*
4. Hypothesising the story means imagining how the article may eventually play out. Protagonists are contemplated, experts are identified, angles and frames are played with, judgements are considered. Central question: *What can I contribute?*
5. The next steps are meant to bring the reporter closer to the research target, to verify or falsify the hypotheses formulated earlier. Interviewing experts is a way of finding out whether a hypothesis is correct, or at least plausible. Citing eminent figures also adds credibility to a story. Central question: *Am I on the right track?*
6. Meeting and interviewing people who are affected by a particular situation (involuntarily), "victims" in the terminology of Figure 1, is essential for being able to tell a relatable story. Furthermore, these protagonists add a real-life perspective to the picture that may differ from the one derived from the more abstract preceding steps. Central question: *How does it feel on the ground?*



7. Finally, the reporter approaches and confronts those who bear responsibility for the particular situation. Interviewing agents is a matter of professional **fairness**. Central question: *Who is responsible?*

### Input: Mismanagement of EU Funds



Figure 120: Why is EU Cohesion Policy is not having the desired effects in Southern Italy?; Source: Pixabay

As you have already learned in Module 8, the literature investigating the **efficiency** of EU Cohesion Policy does not come to homogeneous results. Some researchers detect positive impacts of EU Funds on social and economic progress, others state that the same funds are not (always) used in an efficient way. A recent study by [Lang et al. \(2023\)](#), for instance, acknowledges that EU Cohesion Policy is effective in reducing disparities between European regions, but fails to reach the most disadvantaged people and ultimately exacerbates inequalities between rich and poor within regions.

Other research results conclude that a lot of money is invested in European regions without having a significant or indeed any impact on regional **growth**. If you would like to learn more, about which regions are concretely affected, please consult Module 8. One mentioned example is Southern Italy, also called “Mezzogiorno”.

[Coppola et al. \(2020\)](#) find a significant positive impact of EU Funds (and less of national funds) on the **gross domestic product (GDP) per capita** of the 20 Italian administrative regions for the period 1994–2013, both with and without national co-financing. In addition, according to the authors the quality of government has very little influence on the effectiveness of EU Funds. However, Coppola and his colleagues also state that EU Funds can **crowd out** other public investments.

[Aiello \(2017\)](#) comes to more negative conclusions. Please read the text and pay attention to the reasons the author gives as to why EU **regional policy** has been ineffective in Southern Italy.

### Input: Improving EU Cohesion Policy requires transparency and public scrutiny

The overall findings exhibit signs of money mismanagement that journalists should shed light on. In this context, briefly think about the **ESSF Formula** again: Which journalistic categories of the **ESSF Formula** are violated if EU Funds are mismanaged or spent on unsustainable projects?

All actions that include the mismanagement of EU Funds constitute a violation of the criterion of **efficiency**, since money that is meant to increase the **welfare** of the entire society is not (completely) used for the intended purpose, and certain individuals or groups could be better off in economic terms. In addition, the criterion of **fairness** is affected. This is also the case if mismanagement of EU Funds is conducted with the purpose of giving an individual an advantage to the detriment of others.



Figure 121: Journalism ensures public scrutiny; Source: Pixabay



## Various factors promote mismanagement of EU Funds

Eventually, the decision where money flows go includes a lot of bureaucracy and coordination with several partners being involved in the implementation process of EU Cohesion Projects. The division of responsibilities between the EU and its national, regional and local partners, especially in the context of monitoring and evaluating EU Cohesion Projects, often remains unclear. In other cases, there is insufficient administrative capacity or, simply put, too few personnel to manage and eventually implement funds on site. The absence of strong and well-established institutions can lead to money being **wasted** and prevent investments from reaching target groups and individuals. To make matters worse, an unclear or incomprehensible assignment of responsibilities and ineffective governance structures can impede transparency and further elevate the risks of **corruption** and **fraud**. Journalism, however, can provide this transparency. If you would like to learn more about the role of journalism in preventing wrongdoings, please consult Module 8.

By providing transparency and public scrutiny, journalism can prevent excessive and unreasonable use of public money at the local and regional level. Research conducted by [Gao et al. \(2019\)](#) examining the closure of local newspapers in the United States of America (USA) shows that public finances tend to increase if local newspapers are closed – due to a lack of independent government control. The authors write in the abstract that “local newspapers hold their governments accountable, keeping municipal borrowing costs low and ultimately saving local taxpayers’ money” ([Gao et al., 2019](#)), and further, “government **efficiency** outcomes are substantially affected by newspaper closures” ([Gao et al., 2019, p. 41](#)). In terms of **efficiency**, journalism consequently plays an essential role in several respects.



Figure 122: Lobbyists seek contacts with decision-makers;  
Source: Pixabay

### **Input: Behind every investment there are interests**

Furthermore, the distribution of EU Funds depends on various interests and how well actors can enforce their interests. **Lobbying, political clientelism** and **rent-seeking** are still prevalent in the EU and its member states. More than 300 represented local and regional authorities are based in Brussels lobbying the European Commission and assorted organisations for help ([Brussels Commissioner for Europe and International Organisations, n.d.](#)). Likewise large corporations and multinational businesses lobby forcefully to achieve their agenda.

But other groups lacking financial muscle, like citizens or minorities, find it harder to get their ideas and interests represented. Thus, (public) discussions are not conducted on an equal footing. There is no (complete) [deliberative \(public\) discourse](#). For this reason, the best option or project is not necessarily always chosen in the end (Federal Agency for Civic Education, n.d.).

An interesting finding related to **rent-seeking** in EU **regional policy** comes from Blankart and Ehmke:

*“Applicants need **resources** to present themselves as eligible and ministers have to make calculations to sustain their selections. [...] **Rational** candidates invest in order to obtain the prize up to an amount that equals the benefits of the prize. The net effect is zero. [...] The sum of all candidates’ **transaction costs** destroys the benefits of the prize competition for society.”*  
([Blankart & Ehmke, 2015, pp. 44–48](#))

Simply put, the researchers' findings constitute that agents applying for EU Funding have an incentive to invest in demonstrating their own eligibility, up to the maximum amount of expected funding they would eventually receive. In this case, however, the outcome for society would be lower or even zero.

If you would like to know more about journalists investigating **lobbying** and **rent-seeking** in the European Union, please refer to [“Bureau Brussels” by Follow the money \(FTM\)](#), a platform for independent investigative journalism (Follow the money, n.d.). Data journalist Ada Homolová who is part of the COPE partner [Arena for Journalism in Europe](#) (n.d.) is also working with Bureau Brussels on European stories (see Module 11 as well).

### **EC sees efficiency at the heart of EU Cohesion Policy**

All previously mentioned factors can together facilitate mismanagement of EU Funds. However, the European Commission responds to the assumption that EU money is often mismanaged as follows:

*“Since almost 75% of EU spending is managed jointly by both the EU Commission and EU governments, those governments share the responsibility for minimising errors. The Commission is working closely with them to ensure money is spent effectively and efficiently. For its part, if the Commission detects that EU money has been spent incorrectly, it takes action. In 2017, for example, on funds disbursed to recipients across the EU and beyond €2.8 billion in funding was either recovered by the Commission or redirected to other projects.”*  
[\(European Commission, n.d.\)](#)

The striking aspect of this pronouncement is again that the goal of **efficiency** is evidently at the core of implementing EU Cohesion Policy.

**Now it's your turn!**

#### **Input: Your research scenario**

Journalism can play a decisive role in preventing mismanagement of EU Funds right from the beginning as it can ensure to include all relevant voices in the debate about the implementation of EU Cohesion Projects, and continuously shed light on potential wrongdoings, so that EU Funds are eventually implemented efficiently.



*Figure 123: Investigating a specific EU Cohesion Project; Source: Pixabay*

However, always keep in mind: Your task as a journalist is not to condemn EU Cohesion Policy across the board, but to research and express constructive criticism, so that EU Funds are spent efficiently. European integration is a reality that needs to be constantly explored, investigated, and scrutinised – from the critical perspective of independent journalism.

**Now it's your turn!**

From now on, imagine the following scenario: It is the EU Cohesion Funding Period 2021–2027. The relevant funding programmes have been issued, some EU Cohesion Projects have already been

selected and their implementation has started. Many calls for proposals, however, are still open, so there is still money available for distribution. The municipal council of your small home town has just applied for a tender and will most probably receive the necessary EU Cohesion Funding for the construction of a new sports hall on the edge of a nature reserve (see also Module 7). Imagine that the nature reserve has an important biodiversity giving home to thousands of animal and plant species, some of them being endangered.

Your chief editor is convinced that ECONOMIX must get ahead of potentially critical news situations instead of reporting backwards as it has often been the case in past coverage of other media outlets. The example of the new sports hall is the perfect opportunity. Furthermore, by referring to a specific EU Cohesion Project that is applicable to many other municipalities and regions in the European Union, ECONOMIX could help its readers all over Europe relate to the issues at hand – instead of addressing EU Cohesion Policy on an abstract level (see Module 8).

You decide to pursue a story about the new sports hall for ECONOMIX, addressing the following question: Are EU Funds well-invested in the construction of a new sports hall in your home town? In doing so, especially the concept of **economic efficiency** shall be discussed and emphasised. If you would like to learn more about the definition of **economic efficiency**, please consult Module 8. Inefficient investments are a bad argument for assigning more EU Funds to less developed regions in the EU. In addition, infrastructure programmes like the building of the new sports hall can be prone to **corruption** and **fraud** – which would eventually damage the credibility of the European Union.

## Exercise 2 – Your research plan:

As stated earlier, when approaching your new topic you need a well-conceived research plan beforehand, so that you can ask the right questions to the right people at the right time during your research.

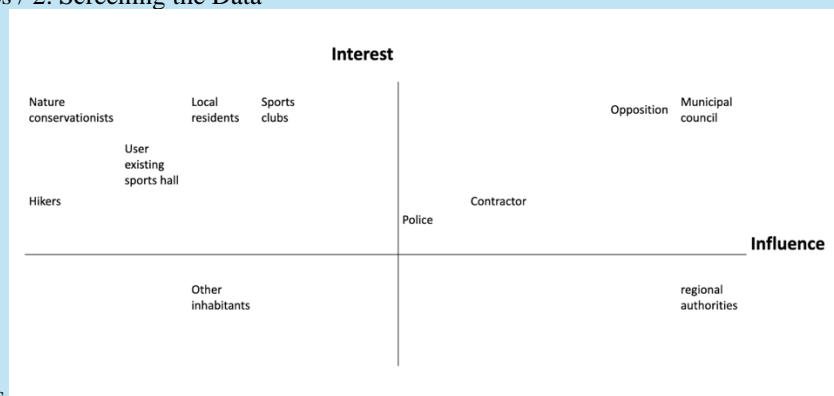
That is the reason you find the research plan below depicting the seven stages of journalistic research into economic topics. During the following inputs and exercises, you should fill in your research plan with the relevant information you gather, while you are investigating if the construction of the new sports hall in your home town is an efficient EU Cohesion Investment.

As the module progresses, you will be continuously provided with an updated best practice example of the research plan to compare your own notes. Download the research plan now and start your research.

### Research Plan:

**Stage of journalistic research process      Relevant information, sources, questions, contact persons      Further notes**

1. Consulting the Archives / 2. Screening the Data



3. Deducing Interrelations

4. Hypothesising the story

**Construction**

**Evaluation**

5. Interviewing Experts

6. Interviewing Victims

7. Interviewing Agents

## Exercise: Start your research

Before you approach potential protagonists, experts and other interviewees you should start with some basic research concerning your topic, to be exact, [stage 1](#) and [stage 2](#) of the journalistic research process into economic topics.

1. Stage 1: It all starts with consulting the archives. Press databases, search engines, and the library need to be browsed to find out whether the envisioned story is original. Central question: *What's new?*
2. Stage 2: Step two focuses on hard facts: official data, company and national accounts, surveys, scientific studies, analysts' reports, but also possibly confidential documents or exclusively scraped data from the internet inform the reporter regarding the second central question: *What's true?*

Briefly summarised, your first task would be primary research on previous (press) reports, information available on the internet and in libraries, as well as official data, studies and other investigations dealing with the use of EU Funds for infrastructure projects such as the construction of a new sports hall.

You decide to orient yourself first and examine if there are similar EU Cohesion Projects that have been or are currently implemented and consult the EC's website [Kohesio](#) (European Commission, n.d.). This website enables you to navigate to EU Cohesion Projects on an interactive map, and filter projects using various options such as keywords, the respective region or the total budget invested. In this respect, [Kohesio](#) is a crucial platform because it facilitates data access not only for journalists, but also for local populations who wish to receive concrete information about EU Cohesion Projects being implemented in their city or region. Providing data that is easily accessible, transparent and available for free is another decisive requirement for creating public awareness and scrutiny of EU Cohesion Policy. If you would like to learn more about [Kohesio](#), please consult Module 11.

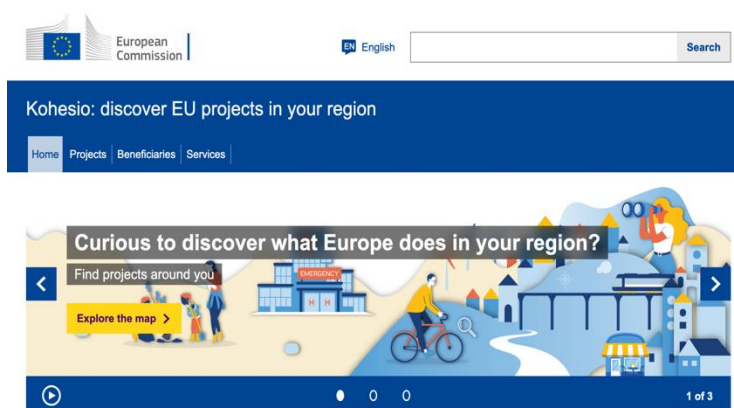


Figure 124: Explore Kohesio; Source: [European Commission, n.d.](#)



### Exercise 3:

Please go to Kohesio now and enter the keywords “sports hall” to get an overview of EU Cohesion Projects relevant to your research. Take notes on the following questions in your research plan:

1. In which countries are EU Funds involved in the construction and renovation of sports halls?
2. What is the EU’s share of financial contributions to such projects? (in %)
3. Which EU Funds do the investments come from?
4. Who are the **managing authorities**?
5. Who are the beneficiaries?
6. Which themes are mainly addressed?

In connection to the last question, go to the EC’s website as well and check the [priorities of EU Cohesion Policy for the funding period 2021–2027](#) (European Commission, n.d.). Think about which of the policy objectives should probably be addressed with the building of a new sports hall.

Use a maximum of 20 minutes to work on this exercise. The solution to this exercise can be found at the very end of this module.

### Exercise: Who are the relevant stakeholders?

So far, you have got an initial overview of EU Cohesion Projects which have already been or are still being implemented related to the construction of sports halls in the European Union. Now you should proceed to stage 3 of the journalistic research process into economic topics and interrelate the collected information and data to find out about the relevant angles and perspectives your story should take into consideration. In this respect, figuring out the relevant stakeholders is an enormous help.



Figure 125: EU Cohesion Projects impact many people;  
Source: Pixabay

3. Stage 3: Trying to deduce interrelations between facts and data helps to illuminate matters of interest behind the data. The reporter employs their knowledge and experience to get to a preliminary understanding of potential causes-consequences nexuses and responsibilities of persons or institutions, all of which are features of a narrative and thus of a comprehensive news story. Central question: *What’s going on?*

For this purpose, you can employ a brainstorming technique called **stakeholder mapping**. If you would like to learn more about **stakeholder mapping**, please consult Module 7. For the specific case of building a new sports hall on the edge of a nature reserve, Module 7 already provide a solution with relevant stakeholders involved in such a project. The stakeholders are put in a stakeholder map resembling a coordinate system made up of the two axes “influence” and “interest”. You find the pre-filled stakeholder map already in your research plan (see also Module 7).

#### Exercise 4:

Consider the interrelations between the stakeholders and illustrate them with arrows, symbols and words. The guiding questions are as follows:

- Which stakeholders could be in favour of the construction of a new sports hall on the edge of a nature reserve, and who could be against it?
- Which stakeholders have the same, which stakeholders have dissimilar interests?
- Who is dependent on whom?
- Is there any kind of cooperation or rivalry between certain stakeholders?
- Which stakeholders could come into conflict?

As assistance, consider the relevance of the four journalistic categories of the **ESSF Formula** – **efficiency, stability, sustainability, and fairness** – in the specific case of building a new sports hall on the edge of a nature reserve and which categories are addressed with such a project. They give you indications on which stakeholders might be affected by the construction of the new sports hall in your home town in a certain way.

Use a maximum of 15 minutes to work on this exercise. You can find a suggested solution at the very end of this module.

#### Input: Things get concrete!

You take a break and meet up with your colleague Sabrina in a small park directly next to the ECONOMIX newsroom to discuss your results. You tell her what you have discovered so far. Sabrina is convinced: There is huge potential for a journalistic story on how efficient the construction of the new sports hall in your home town really is. She asks you to give her a call again as soon as you have published your final story. You agree and hurry back to your desk. Because now the very exciting part begins, namely to put all the collected information into a concrete form. That means you should now envision how your journalistic story could actually look like. This is also described in [stage 4](#) of the journalistic research process into economic topics.

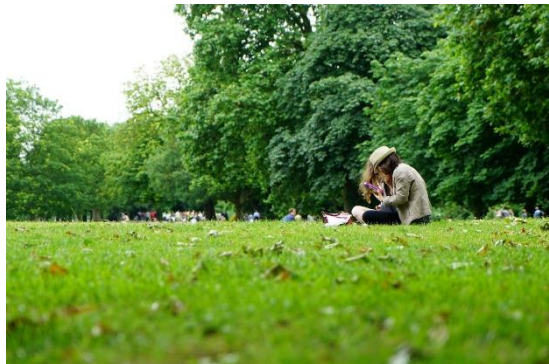


Figure 126: What have you found out so far?; Source: Pexels

4. Stage 4: Hypothesising the story means imagining how the article may eventually play out. Protagonists are contemplated, experts are identified, angles and frames are played with, judgements are considered. Central question: *What can I contribute?*



### Exercise: Ask the relevant questions

The building of a new sports hall might be socially desirable, as you can conclude from the EU Cohesion Policy objectives to which such projects are primarily directed (see the section “Exercise: Start your research” of this Module). But does it also promote sustainable **economic growth** of a town or region? As stated earlier, rather than starting to report when EU Cohesion Projects have already been selected and implemented, critical media coverage should already start in the preceding phases when concepts, ideas and suggestions for potential projects that could be funded by EU Cohesion Policy are developed.



Figure 127: Show your journalistic skills;  
Source: Pixabay

These preceding phases are very crucial, as many relevant considerations take place at these points in the funding process. This gives journalists enormous potential to put topics onto the public agenda right from the beginning, thereby getting ahead of potentially critical news situations.

#### Exercise 5:

For this purpose, you find a subdivision in your research plan in stage 4 as you should now have a look at the three phases of the implementation process of the new sports hall in your home town: selection, realisation, and evaluation. Your next task is to collect relevant journalistic questions you should consider during the phases of the implementation process. Write down these questions in your research plan now.

As assistance during this exercise, you should use the **ESSF Formula** and its implications. Think again specifically about the four journalistic categories of **efficiency, stability, sustainability, and fairness**, and how they will be affected by the implementation of this particular EU Cohesion Project. Economic goals such as **efficiency** and **growth** always need to be balanced with social goals such as **fairness** and redistribution, as well as environmental and other considerations. At the very end of this module, you will be provided with a best practice example again to compare your notes.

Use a maximum of 20 minutes to work on this exercise.

## Some more economic background

### Input: How dynamic are EU economies?

You certainly have encountered the question “Could the project boost the innovative power of the town/region?” in the previous best practice example. Besides other factors like an enhanced **productive capacity and potential** as well as better job opportunities, **innovation** is a decisive driver of **economic growth** and dynamics.

In general, EU Cohesion Policy aims to enable less developed regions to participate in **market integration** by providing them with the necessary conditions like transport and communication infrastructure, or education (see also Module 8). **Economic growth** requires the elimination of the **(trade) barriers** that still exist in the **European single market** to eventually increase the **productive potential** of lagging regions. However, to retain **economic growth** in the long-term, it is equally important to strengthen the dynamics and innovative power of a region. [Maucorps et al. \(2022\)](#) see **innovation** as one of five key factors of **economic growth** – besides high-skilled employment, infrastructure, institutional quality, and investment. There is a fundamental relation between high-skilled employment or the education and training of people and the innovative power of a country or region.

[Jagódka and Snarska \(2022\)](#) examine this relationship for Polish regions and conclude that the level of education and skills of people are unequally distributed across Poland and especially differ between urban and rural areas. This, however, does not point to the ineffectiveness of EU Cohesion Policy, but instead calls for an extension of that policy, “so that the adjustment processes take material form” ([Jagódka & Snarska, 2022, p. 912](#)).

A possible, albeit incomplete, indicator of the dynamics of economic development is the growth rate of the **GDP**. Have a look at the following map depicting the average annual **GDP** growth rate from 2009–2019 at the level of EU **NUTS 2** regions. What can you observe?

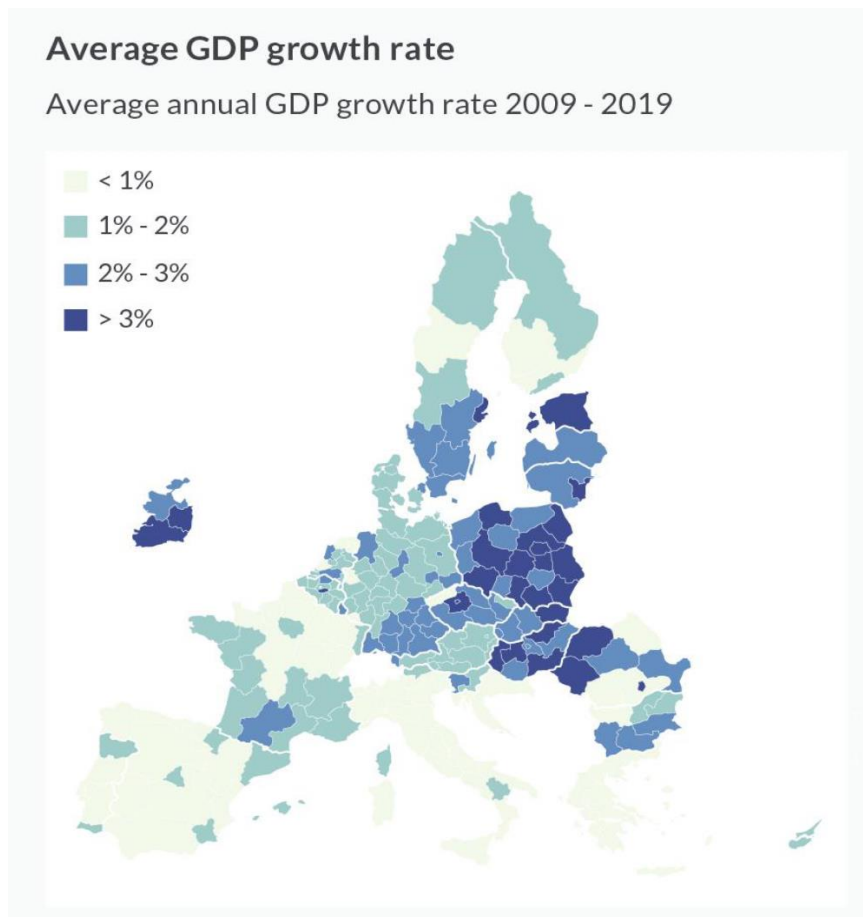


Figure 128: Average annual GDP growth rate (2009-2019) at the level of EU NUTS 2 regions;  
Source: [Maucorps et al., 2022, p.9](#)

When looking at economic dynamics, the leaders are mainly Central-Eastern European regions – Hungary, Poland, Slovakia and the Baltic countries – together with regions in Ireland, Southern Sweden and parts of Romania and Bulgaria. According to [Maucorps et al. \(2022, p. 10\)](#), the main driver for this catching-up process was the structural change in the economies from low value-added activities to higher value-added ones in the past decade. The [8th Cohesion Report](#) notes that the strong **growth** observed in Eastern Europe was also due to returns on infrastructure investments and cost advantages (European Commission, 2022). Regions in Croatia, Greece, Italy, Portugal, Spain and Northern France, in contrast, are underperforming. The [8th Cohesion Report](#) indicates that these regions have fallen into a “development trap” (see also the section “The risk of falling into a ‘regional development trap’” of this Module) that can only be overcome by strong public sector reforms, improving skills and increasing **innovation** potential (European Commission, 2022).

### **Input: The EU Regional Competitiveness Index 2.0**

In 2023, the European Commission published a new edition of the Regional Competitiveness Index (RCI) with supplement 2.0. The index measures the main factors of competitiveness for all **NUTS 2** regions in the European Union by using a variety of indicators to measure a region's ability to provide an attractive environment for businesses and residents to live and work. The main findings are summarised as follows:

*“The 2022 edition of RCI 2.0 shows large differences in regional competitiveness in the EU. In line with previous editions, it shows a polycentric pattern, with a strong performance of regions hosting large urban areas in the EU. The gap between the capital city region and the rest, however, varies among EU member states, with more competitive countries tending to*

have a smaller gap between their capital city region and its other regions, as well as lower internal variation. Between 2016 and 2022, regional competitiveness has improved in the less developed regions, while the performance of transition regions has been more mixed. More developed regions continued to have the highest scores, but they have converged on the EU average.” (European Commission, 2023)

An important note: The RCI 2.0 uses data up to 2019 prior to the COVID-19 pandemic and the war in Ukraine. The especially relevant aspects for you in this context are two sub-indices of RCI 2.0, the “**Efficiency**” sub-index comprising the indicators of higher education, training and lifelong learning, labour market efficiency and market size, and the “**Innovation**” sub-index comprising the indicators of technological readiness, business sophistication and innovation.

Have a look at the two maps below depicting the RCI 2.0 “Efficiency” sub-index as well as the “Innovation” sub-index for EU NUTS 2 regions. What can you observe here?

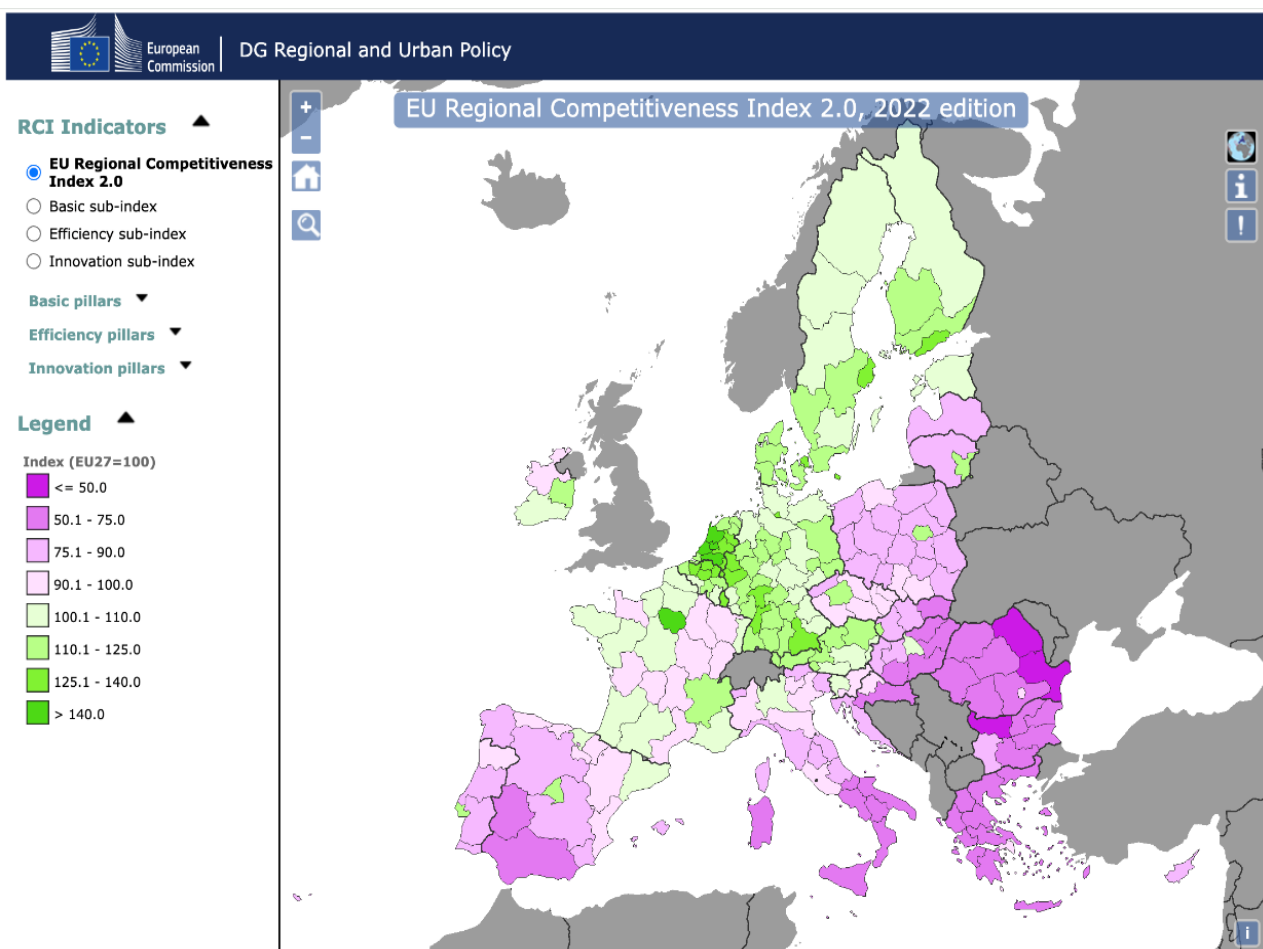


Figure 129: RCI 2.0 "Efficiency" sub-index; Source: [Dijkstra et al., 2023, p.15](#)

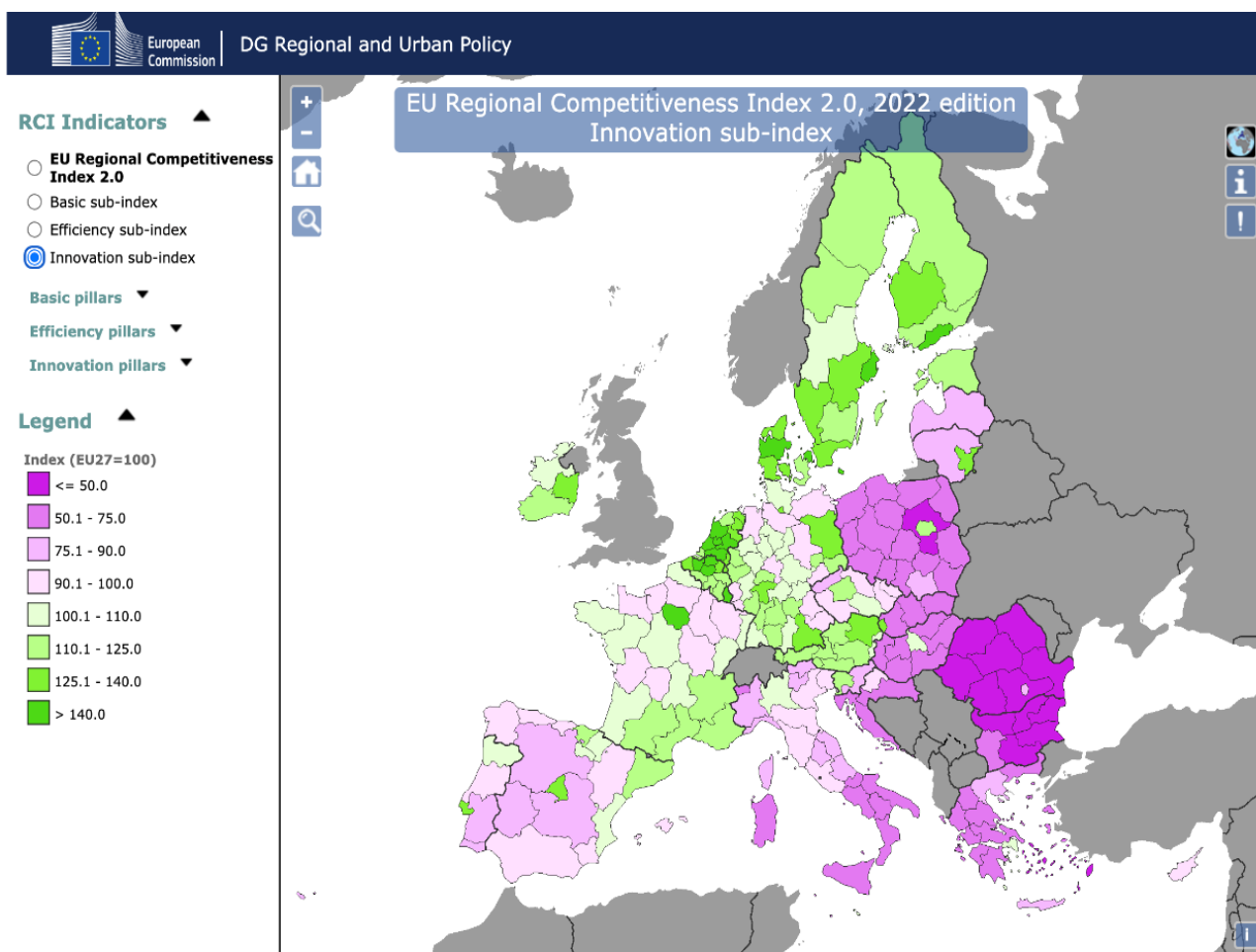


Figure 130: RCI 2.0 "Innovation" sub-index; Source: [Dijkstra et al., 2023, p.15](#)

A quite obvious aspect compared to the **GDP** growth rate as an indicator for economic dynamics is that the calculations for **efficiency** and **innovation** for EU NUTS 2 regions differ to some parts from previous findings. Regions that perform well in terms of **efficiency** are mainly located in Austria, Germany, Denmark, Slovenia, the Benelux countries, as well as parts of France, Ireland, and Sweden. For **innovation**, regions in the same countries complemented by regions in Estonia and Finland are the top runners. The common aspect that applies to both maps is that regions in Central-Eastern and Southern Europe struggle the most in terms of **efficiency** and **innovation** according to the EC's findings. When looking at **GDP** growth, however, Central-Eastern European regions had been in the top group, while Southern European regions also underperformed in this respect.

Overall, the findings should highlight how manifold results can be when assessing the current economic development and prospects of individual EU regions or countries. This is due to the inability of any one factor to capture the whole picture but has to be supplemented by other variables and estimations. Consequently, you should always see such findings in the bigger context and as complementing each other. There does not necessarily have to be a contradiction in the results.

Again, this picture might have changed in the meantime due to the past developments of the COVID-19 pandemic and the war in Ukraine as the data used for the RCI 2.0 and its sub-indices stems from the years up to 2019. If you would like to know more about the Regional Competitiveness Index 2.0, its methodology and further results, please refer to the [EC's website](#) (European Commission, 2023).

You can also find some interactive tools there that help you assess the performance of your own region, as well as a working paper summarising all the relevant results of the RCI 2.0.

### Input: The risk of falling into a “regional development trap”

The first phases of an economic upswing are often characterised by considerable **growth** rates and an increase in prosperity. However, as economic progress moves forward, emerging regions could fall into a “regional development trap”, defined as

*“the state of a region unable to retain its economic dynamism in terms of income, **productivity**, and employment, while also underperforming its national and European peers on these same dimensions. Stated differently, a region can be said to be development trapped if the prosperity of its residents does not improve relative to its past performance and the prevailing economic conditions in national and European markets.”* (Diemer et al., 2022, pp. 489–490)

Diemer et al. see this danger especially for regions in Western and Southern Europe ([2022, p. 498](#)). These findings are confirmed by estimations of the European Commission, as you can see in the map below.

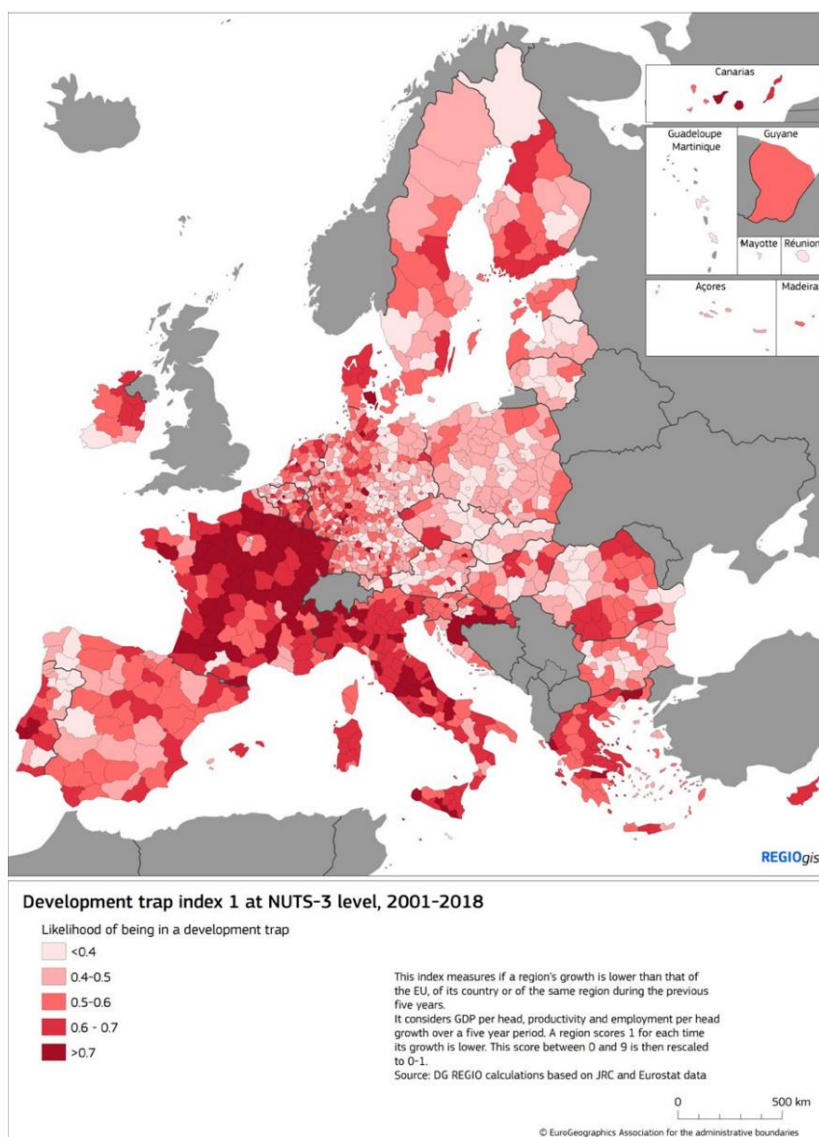


Figure 131: EU regions in a development trap at the level of EU NUTS 3 regions (2001-2018);  
Source: [Rodríguez-Pose et al., 2023, p.16](#)



Being stuck in a “regional development trap” for years or even decades can reinforce EU citizen’s feelings of frustration and make them increasingly turn away from European integration and values ([Rodríguez-Pose et al., 2023](#)).

However, a provocative question that might arise from this is: Is it really possible for all EU regions to share equally in economic progress? And is this even desirable? Or is polarisation, for instance between urban and rural areas, even more productive, since **factors** such as social ones or those of **production** differ between cities and the countryside? Furthermore, **market forces** generally favour **agglomerations**. If you would like to learn more about **market forces** and the ensuing economic mechanisms, please consult Module 8. Thus, it might make more sense to invest in promising regions like urban areas rather than financing projects in rural ones. For instance, it could be more efficient to financially boost **(economic) growth** centres that have the potential to stimulate **growth** in the remaining parts of the region ([Hoover & Giarratani, 1999, pp. 267–272](#)), accompanied by a stronger focus on fostering linkages between urban areas and peripheries ([Rauhut & Humer, 2020](#)). This is a point for discussion.

Other developments related to **economic growth** such as **demographic** change can be discussed as well. Is it possible or even sensible to keep all young people in peripheral regions, or could it also be profitable for the European Union if a young, high-skilled workforce can realise its full potential in productive urban areas? Another controversial issue could be the intensity of funding: EU Cohesion Policy follows the **Principle of Additionality** which means that financing from the EU should not replace national spending on the same investment priorities (Halasz, 2018). However, is it possible to actively prevent countries from relying too much on EU Funding? And, if so, how could that be achieved in practice? By reducing the EU’s financial contributions? These questions are difficult to answer, aren’t they? And they provoke contrasting opinions and attitudes, which the next stages 5–7 of the journalistic research process into economic topics are about.

## Sketch your ECONOMIX Story

### Input: Interviewing experts

Experts play an important role in the journalistic research process. Although journalistic independence requires the ability of journalists to judge for themselves the significance of a story and the viability of an argument, they still need sparring partners. As editor of ECONOMIX, you have a general understanding of the mechanisms related to EU Cohesion Policy by now, but you probably still need expertise on legal requirements or a professional assessment by a natural scientist on the consequences of building a new sports hall on the edge of a nature reserve.



*Figure 132: Expertise requires competence, but not necessarily independence; Source: Pixabay*

The issue, of who qualifies as an expert for a particular research project and who does not, must be judged with a sense of proportion. An expert is a person who has a deeper scientific or professional understanding, but who has no direct personal interests in relation to the topic in question. A lot depends on the specific context. An example from the business world: An economic forecaster at a public research institute certainly qualifies as an independent expert as far as the business cycle outlook is concerned, but he’s hardly without personal interests when his own institute is being scrutinised for its performance or financial conduct. In the latter case he may be an “agent” or a



“victim”, depending on his rank and responsibilities (see the Figure “Seven stages of journalistic research into economic topics”).

### **Pay attention to lobbyism and promotion of experts**

And be careful: Sometimes **lobbyists** and activists are mistaken for experts, but are nevertheless often referred to as “experts” in media coverage. Although they usually have a lot of issue-specific knowledge, they are by no means neutral, but strive to promote the interests of their respective organisations. For instance, this applies to trade unions, Chambers of Commerce and Industry (CCIs), institutes, employers’ and trade associations, but also to NGOs like Amnesty International or Greenpeace that pursue social and sustainable goals. Like political parties, politicians and members of parliament, these organisations are political players and should be treated as such.

Furthermore, to ensure journalistic independence and multiperspectivity, it is important to consult a variety of experts instead of interviewing the same persons again and again. The promotion of experts has become a business model for communication departments and PR agencies. In media markets characterised by high speed and low profit margins, they are quite successful.

Relevant questions to ask at stage 5 of the journalistic research process into economic topics should be the following:

- Who is an expert?
  - What qualifies somebody to be/become an expert for a journalistic story?
  - Is an expert truly independent, or representing certain (powerful) interests?
  - Does an expert really know something about the topic at hand?
  - Which concrete information do you want to get from an expert?
5. The next steps are meant to bring the reporter closer to the research target, to verify or falsify the hypotheses formulated earlier. Interviewing experts is a way of finding out whether a hypothesis is correct, or at least plausible. Citing eminent figures also adds credibility to a story. Central question: *Am I on the right track?*

#### **Exercise 6:**

Transfer the listed questions to your research plan now and add more relevant questions if necessary. You can find a best practice example for a solution to this exercise at the very end of this module.

## Input: Interviewing victims

After you have consulted expert knowledge and opinions on your research topic, you need to get closer to the people that are affected by the construction of the new sports hall. First and foremost, these are local citizens who either feel benefitted by the new sports hall because they can practise their sport on a regular basis now, or impaired by its building because it harms the nearby nature reserve where they often go for walks or recreation. Further relevant interviewees could be action groups or citizens' initiatives. They are hardly considered in media coverage of EU Cohesion Policy (see the section “Local window: Extract the story” of this module.



Figure 133: How does it feel on the ground?; Source: Pexels

At this stage of the journalistic research process, it is about giving a voice to the voiceless. However, this does not mean taking sides with anyone, but considering those who themselves have no voice and no **lobby**.

Relevant questions to ask at stage 6 of the journalistic research process into economic topics should be the following:

- Who is directly affected by the construction of the new sports hall on the edge of a nature reserve? And in which way?
  - Who are the ones that should benefit from an EU Cohesion Project? And is this really the case?
  - Are EU Funds well-spent on this specific project?
  - Are there other more urgent/necessary projects to be implemented?
  - What do local citizens wish for? What should EU Funds improve in their lives?
  - Do local citizens also see disadvantages of EU Cohesion Funding in their town/region?
6. Meeting and interviewing people who are affected by a particular situation (involuntarily), “victims” in the terminology of Figure 1, is essential for being able to tell a relatable story. Furthermore, these protagonists add a real-life perspective to the picture that may differ from the one derived from the more abstract preceding steps. Central question: *How does it feel on the ground?*

### Exercise 7:

Transfer the listed questions to your research plan now and add more relevant questions if necessary. You can find a best practice example for a solution to this exercise at the very end of this module.

## Input: Interviewing agents

In the last stage of the journalistic research process into economic topics, you should approach and interview the actors, institutions and organisations that are responsible for the construction of the new sports hall in your home town.



Figure 134: Who is responsible?;  
Source: Pixabay

Potential contact partners on the EU side are:

- the [EC's spokesperson's service](#) (European Commission, n.d.)
- the [EC Representations](#) in the individual EU member countries (European Commission, n.d.)
- the [Liaison offices of the European Parliament](#) in the individual EU member countries (European Parliament, n.d.): Through these offices, you can get in touch with local members of the European Parliament (MEPs) who often know the projects very well and can tell you something about their story. The Liaison offices can also put you in contact with the [EP Committee on Regional Development](#) (REGI) (European Parliament, n.d.).
- the [European Committee of the Regions](#) (European Committee of the Regions, n.d.)
- the [EU Regional Offices](#) (European Commission, n.d.)

According to the [German EC Representation in Berlin](#) (European Commission, n.d.), journalists should not only inquire at EU level. EU Cohesion Projects always have a national and regional reference. Thus, other important sources are the individual member states' authorities on national, regional and local level. The [managing authorities](#) implementing EU Cohesion Projects on site such as ministries should be highlighted here as well as city councils, municipalities, and other local and regional partners. The first points of contact are often the respective press offices.

When it comes to the monitoring and evaluation of EU Cohesion Policy, a further interesting source could be monitoring committees (MCs) such as the [Monitoring Committee of the Interreg VI-A Romania-Hungary Programme](#) (Interreg Romania – Hungary, n.d.). Third parties like academics, associations, NGOs and trade unions can be invited to participate in these committees, and discuss the implementation, effectiveness and performance of EU Cohesion Policy Programmes.

Last but not least, the companies involved in building the new sports hall are also relevant contact partners. Generally, in state-funded projects it is worth asking proactively whether EU money is also part of the funding.

Relevant questions to ask at [stage 7](#) of the journalistic research process into economic topics should be the following:

- Who manages EU Funds (on site)? Who decides where EU Funds ultimately go?
- Who can be held accountable for the implementation of a specific EU Cohesion Project?
- Who is responsible for the actual realisation of the project? Who delivers the materials, components, and so on?
- Are there signs of misconduct, conflicts of interest, or favouritism?

7. Finally, the reporter approaches and confronts those who bear responsibility for the particular situation. Interviewing agents is a matter of professional **fairness**. Central question: *Who is responsible?*

### Exercise 8:

Transfer the listed questions to your research plan now and add more relevant questions if necessary. You can find a best practice example for a solution to this exercise at the very end of this module.

### Exercise: Sketch your ECONOMIX story

Excellent work! You have completed the journalistic research process into economic topics and gathered all the relevant information. Now you can develop your own journalistic story for ECONOMIX on how efficient the construction of a new sports hall in your home town financed by EU Cohesion Policy really is.



*Figure 135: How do you envision your journalistic piece?; Source: Pixabay*

### Exercise 9:

In short, your final task is the following: Sketch your journalistic story in an essay of 600–800 words, with the help of these guiding questions. Also use the questions to evaluate your own essay at the end, and check whether you have considered all relevant aspects:

- What is your research objective?
- Which concrete story do you want to tell?
- Which journalistic format(s) would you choose (report, comment, feature, reportage, and so on)?
- Will there be a protagonist/protagonists in your story? If so, who would you choose?
- Which type(s) of media would you like to use? (online, print, radio, social media, TV, and so on)
- Who would you like to interview and why? And in which order?
- What would you like to ask your interviewees?

Use your filled research plan as assistance to look for relevant aspects you would like to cover in your story and sources you would like to approach. Make sure your essay has a clear structure, comprehensible and concise language, and well-conceived arguments.

Use a maximum of 45 minutes to work on this exercise.

## Conclusion

Module 9 has guided you through a whole journalistic research process into a topic related to EU Cohesion Policy. It made you apply the newly **developed ESSF Formula** with its four journalistic categories – **efficiency, stability, sustainability, and fairness**. To increase effectiveness and visibility of EU Cohesion Investments, the European Commission must focus the spending of EU Funds on well-selected projects. But is the construction of a new sports hall the right project to be implemented from an economic point of view? Does it create new job opportunities? Does it lead to sustainable **economic growth** in a town or region? Does the project boost **innovation**? This is debatable, as you have seen while working on Module 9. Opinions, attitudes and interests can differ greatly in this regard.



Figure 136: Congratulations on completing Module 9!;  
Source: Pixabay

But how can you as a journalist assess which interests are the relevant ones, and how can they be reconciled with divergent points of view? The **ESSF Formula** provides a suitable framework for that as it takes various dimensions into consideration. Consequently, it equips you as a journalist with a useful toolbox to report on the EU and EU Cohesion Policy, in particular, from a broader and more comprehensive perspective.

## Further literature and contact information

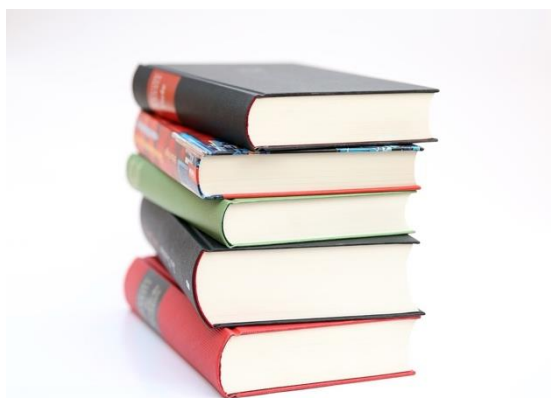


Figure 137: More to read; Source: Pixabay

We would like to recommend further literature to you:

### **Academic literature on economic news coverage, economic journalism and the ESSF Formula:**

Müller, H. (2023). *Challenging Economic Journalism. Covering Business and Politics in an Age of Uncertainty*. Palgrave Macmillan. <https://doi.org/10.1007/978-3-031-31030-0>

### **Institutional source on how EU Cohesion Policy could be improved for the future:**

Darvas, Z., Mazza, J., & Midoes, C. (2019). *How to improve European Union cohesion policy for the next decade*. Bruegel. <https://www.bruegel.org/policy-brief/how-improve-european-union-cohesion-policy-next-decade>

### **Institutional source on how the European Union has a concrete impact on your region and your life:**

European Parliamentary Research Service (EPRS). (n.d.). *What Europe does for me*. European Parliamentary Research Service. <https://what-europe-does-for-me.eu/en/portal>

If you have any questions or suggestions, please feel free to contact the authors of this module:

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## Solutions for Module 9:

### Exercise 1:

1. **Correct answer:** efficiency  
**Explanation:** If deadweight losses occur, (economic) actions are not maximising social welfare, hurting the criterion of efficiency. In this particular case, there is the possibility that the administrative burden of an EU Cohesion Project might be unmanageable, that is, an inefficient amount of funds would be spent on bureaucratic processes if the administrative capacity is insufficient.
2. **Correct answers:** efficiency, sustainability  
**Explanation:** Spending public money on projects without lasting effects on regional growth and standards of living equals wasting public funds, violating the criterion of efficiency. If a project additionally meant to improve the environmental quality fails to do so, it clearly violates the criterion of sustainability.
3. **Correct answer:** sustainability  
**Explanation:** If an EU Cohesion Project has detrimental environmental and climate change aspects, it clearly hurts the criterion of sustainability.
4. **Correct answer:** stability  
**Explanation:** If an EU Cohesion Project ensues high follow-up costs and a municipality is not able to cover them, but instead runs the risk of getting into financial difficulties, the criterion of stability is addressed.
5. **Correct answers:** efficiency, stability  
**Explanation:** Every EU Cohesion Project potentially involves intended and unintended side effects on other economic variables like regional prices, real-estate values or local wages. If public investments obstruct private ones, for instance, due to missing workforce that would be needed to realise another project, the criterion of efficiency is clearly addressed. If local or regional markets are (heavily) distorted by EU Cohesion Investments, stability might be affected as well.
6. **Correct answers:** efficiency, fairness  
**Explanation:** Corruption doesn't only hurt the criterion of efficiency, but also that of fairness as it takes away resources from society that could have been used for the sake of the community's well-being. Corruption gives an exclusive advantage to the beneficiaries. If there is favouritism involved in the selection of entrepreneurs realising EU Cohesion Projects, it also takes away the chance for other companies to be selected.
7. **Correct answers:** efficiency, stability, sustainability, fairness  
**Explanation:** If targeted EU goals are not in line with local requirements and a certain project runs against a balanced ESSF assessment, all four journalistic categories of the ESSF Formula are affected: efficiency, stability, sustainability, and fairness.

### Exercise 3:

1. If you enter the keywords "sports hall" on the platform [Kohesio](#), you get more than 900 results. EU Cohesion Projects related to the construction or renovation of sports halls are or have been implemented all over the EU, for instance, in Croatia, France, Germany, Italy, Lithuania, Poland, Slovenia, Spain, and the Czech Republic. The total project budgets range from several €10,000 to several €100,000, for instance, for the energetic refurbishment of various sports halls in Germany, Italy and Spain to almost €35 million for the reconstruction and extension of the Urania sports and entertainment hall in Olsztyn in Poland.



2. The EU's share of financial contributions to such projects varies between 30% and 85%. Sometimes it is as high as 90% or more due to exemptions introduced during the COVID-19 pandemic. The remaining share is covered by contributions from the respective member state.
3. The EU's financial contributions come from the **European Regional Development Fund (ERDF)**, the **European Social Fund (ESF)** and the **Cohesion Fund (CF)**. If you would like to know more about the single funds of EU Cohesion Policy, please refer to the detailed explanations in the "[Guide to EU Funding – 2023 Edition](#)" (European Parliamentary Research Service, 2023, pp. 13–35).
4. **Managing authorities** are mainly government offices, ministries and municipalities.
5. Among the beneficiaries are primarily local authorities like counties and municipalities, but also companies, entrepreneurs and foundations.
6. The themes that are mainly addressed comprise low-carbon economy, educational and vocational training, and social inclusion. In line with the investment priorities of the **ERDF**, **ESF** and **CF**, two EU Cohesion Policy objectives are primarily targeted here. On the one hand, it is objective 2: a greener, low carbon transitioning towards a net zero carbon economy. On the other hand, it is objective 4: a more social and inclusive Europe.

**Exercise 4 – Research Plan Update 2:**

Stage of journalistic research process	Relevant information, sources, questions, contact persons	Further notes																		
<p>1. Consulting the Archives / 2. Screening the Data</p>	<ul style="list-style-type: none"> <li>• If you enter the keywords “sports hall” on the platform Kohesio, you get more than 900 results.</li> <li>• EU Cohesion Projects related to the construction or renovation of sports halls are or have been implemented all over the EU, for instance, in Croatia, France, Germany, Italy, Lithuania, Poland, Slovenia, Spain, and the Czech Republic.</li> <li>• The total project budgets range from several €10,000 to several €100,000, for instance, for the energetic refurbishment of various sports halls in Germany, Italy and Spain to almost €35 million for the reconstruction and extension of the Urania sports and entertainment hall in Olsztyn in Poland.</li> <li>• The EU’s share of financial contributions to such projects varies between 30% and 85%. Sometimes it is as high as 90% or more due to exemptions introduced during the COVID-19 pandemic. The remaining share is covered by contributions from the respective member state.</li> <li>• The EU’s financial contributions come from the European Regional Development Fund (ERDF), the European Social Fund (ESF) and the Cohesion Fund (CF).</li> <li>• Managing authorities are mainly government offices, ministries and municipalities.</li> <li>• Among the beneficiaries are primarily local authorities like counties and municipalities, but also companies, entrepreneurs and foundations.</li> <li>• The themes that are mainly addressed comprise low-carbon economy, educational and vocational training, and social inclusion.</li> <li>• In line with the investment priorities of the ERDF, ESF and CF, two EU Cohesion Policy objectives are primarily targeted here. On the one hand, it is objective 2: a greener, low carbon transitioning towards a net zero carbon economy. On the other hand, it is objective 4: a more social and inclusive Europe.</li> </ul>																			
<p>3. Deducing Inter-relations</p>	<p style="text-align: center;"><b>Interest</b></p> <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%; vertical-align: top;">Nature conservationists</td> <td style="width: 33%; vertical-align: top;">Local residents</td> <td style="width: 33%; vertical-align: top;">Sports clubs</td> </tr> <tr> <td style="vertical-align: middle;">Hikers</td> <td style="vertical-align: middle;">User existing sports hall</td> <td style="vertical-align: middle;">Police</td> </tr> <tr> <td style="vertical-align: bottom;"></td> <td style="vertical-align: bottom;">Other inhabitants</td> <td style="vertical-align: bottom;"></td> </tr> </table> <p style="text-align: right;"><b>Influence</b></p> <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;"></td> <td style="width: 33%; vertical-align: top;">Opposition</td> <td style="width: 33%; vertical-align: top;">Municipal council</td> </tr> <tr> <td></td> <td style="vertical-align: middle;">Contractor</td> <td></td> </tr> <tr> <td></td> <td style="vertical-align: bottom;"></td> <td style="vertical-align: bottom;">regional authorities</td> </tr> </table>	Nature conservationists	Local residents	Sports clubs	Hikers	User existing sports hall	Police		Other inhabitants			Opposition	Municipal council		Contractor				regional authorities	
Nature conservationists	Local residents	Sports clubs																		
Hikers	User existing sports hall	Police																		
	Other inhabitants																			
	Opposition	Municipal council																		
	Contractor																			
		regional authorities																		

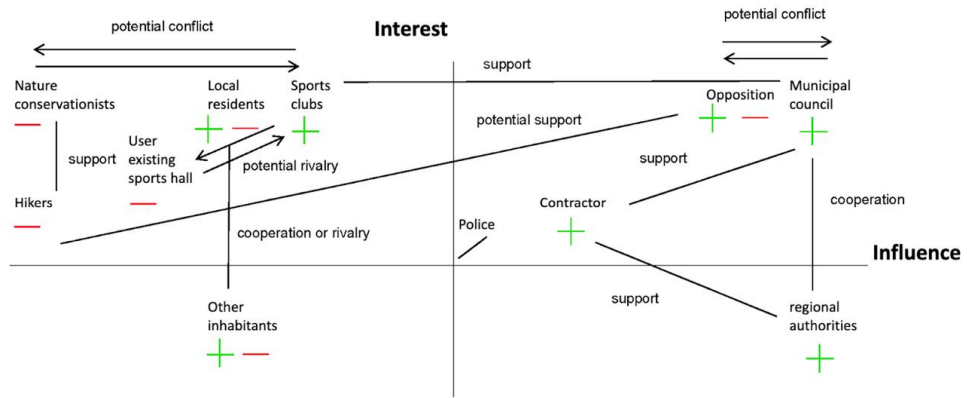
4. Hypothesising the story	<b>Selection</b>		
	<b>Construction</b>		
	<b>Evaluation</b>		
5. Interviewing Experts			
6. Interviewing Victims			
7. Interviewing Agents			

### Exercise 5 – Research Plan Update 3:

Stage of journalistic research process	Relevant information, sources, questions, contact persons	Further notes
<p>1. Consulting the Archives / 2. Screening the Data</p>	<ul style="list-style-type: none"> <li>• If you enter the keywords “sports hall” on the platform Kohesio, you get more than 900 results.</li> <li>• EU Cohesion Projects related to the construction or renovation of sports halls are or have been implemented all over the EU, for instance, in Croatia, France, Germany, Italy, Lithuania, Poland, Slovenia, Spain, and the Czech Republic.</li> <li>• The total project budgets range from several €10,000 to several €100,000, for instance, for the energetic refurbishment of various sports halls in Germany, Italy and Spain to almost €35 million for the reconstruction and extension of the Urania sports and entertainment hall in Olsztyn in Poland.</li> <li>• The EU’s share of financial contributions to such projects varies between 30% and 85%. Sometimes it is as high as 90% or more due to exemptions introduced during the COVID-19 pandemic. The remaining share is covered by contributions from the respective member state.</li> <li>• The EU’s financial contributions come from the European Regional Development Fund (ERDF), the European Social Fund (ESF) and the Cohesion Fund (CF).</li> <li>• Managing authorities are mainly government offices, ministries and municipalities.</li> <li>• Among the beneficiaries are primarily local authorities like counties and municipalities, but also companies, entrepreneurs and foundations.</li> <li>• The themes that are mainly addressed comprise low-carbon economy, educational and vocational training, and social inclusion.</li> <li>• In line with the investment priorities of the ERDF, ESF and CF, two EU Cohesion Policy objectives are primarily targeted here. On the one hand, it is objective 2: a greener, low carbon transitioning towards a net zero carbon economy. On the other hand, it is objective 4: a more social and inclusive Europe.</li> </ul>	

### 3. Deducing Interrelation

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<p>4. Hypothesising the story</p>	<p><b>Selection</b></p>	<p>The guiding question in this phase should be the following:</p> <p><b>Is the construction of a new sports hall on the edge of a nature reserve economically efficient?</b></p> <p>In other words: <b>Is it really the right project to be implemented from an economic point of view?</b></p> <p>Further related questions could be these:</p> <ul style="list-style-type: none"> <li>• Which stakeholders are involved in the selection process of projects? Who is responsible for the final decision where and how funds are allocated?</li> <li>• Does it make any difference if the EU decides that a new sports hall will be built in your home town/region? What would be the ultimate (economic) benefit(s) of the new sports hall?</li> <li>• What about the financial feasibility of the project? Do the capacities for promotion even exist? <ul style="list-style-type: none"> <li>→ What would be the share of the EU's financial contributions, what would be the share of local/regional contributions? Could your home town take its share?</li> <li>→ Is there a way to implement the project more cheaply?</li> </ul> </li> <li>• Are there possibly relevant financial interests? If so, by whom?</li> <li>• Are the tender procedures conducted correctly and fairly? Or is there any indication of irregularities, fraud or corruption?</li> <li>• Where would EU Funds eventually end up? Who would build the new sports hall? Domestic or foreign firms? And who would deliver the individual components?</li> <li>• What could be potential consequences/knock-on effects of building a new sports hall on the edge of a nature reserve? <ul style="list-style-type: none"> <li>→ Would a new sports hall create or attract new jobs for people in the town/region?</li> <li>→ What could happen to factors of production that are limited in your home town/region, for instance, the availability of land and workforce?</li> <li>→ Could there be <b>crowding-out</b> effects of private investments due to public contributions? What about <b>crowding-out</b> effects on the local labour market and construction sector?</li> <li>→ Would the project have been realised even without public funding?</li> <li>→ Which price effects could be expected? Will prices potentially be distorted?</li> <li>→ Could the construction of a new sports hall increase the productive potential of the town/region?</li> <li>→ Could it increase the competitiveness of the town/region, for instance, by attracting big sports events and/or boosting tourism?</li> <li>→ Could the project boost the innovative power of the town/region? Could it increase economic dynamics?</li> <li>→ Could there be other secondary effects on the local/regional market?</li> <li>→ Would there be follow-up costs that have to be covered in the future? If so, who would take them over? And would the respective actor be able to bear these costs?</li> <li>→ Could there be other side effects or <b>externalities</b>?</li> </ul> </li> </ul>	
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		<ul style="list-style-type: none"> <li>• Would the new sports hall improve or worsen the citizens' quality of life? And would the results be the same for everyone, or not?</li> <li>• Could the construction of the sports hall have detrimental impacts on the nearby nature reserve? For instance, could it harm certain endangered animal and plant species?</li> <li>• Are certain claims or interests of stakeholders justified and backed by facts?</li> <li>• How can economic, social and environmental interests be reconciled in the present case?</li> <li>• Is the construction of a new sports hall a key investment for your home town/region? Or are there other more necessary investments that should be arranged? <ul style="list-style-type: none"> <li>→ What are the <b>preferences</b>?</li> <li>→ How high are the <b>opportunity costs</b>?</li> <li>→ Could there be distributional conflicts between certain stakeholders? If so, between which ones?</li> <li>→ Could the ESSF category of fairness be concerned here? If so, how?</li> </ul> </li> <li>• Could the project have an impact on other economic sectors such as the real estate market or the agricultural sector?</li> <li>• Which questions remain unanswered?</li> </ul>	
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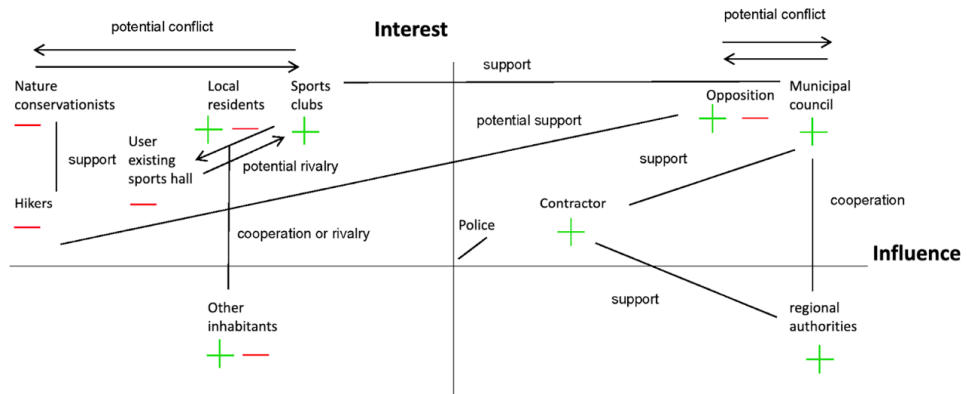


	<p><b>Construction</b></p>	<ul style="list-style-type: none"> <li>• Is the implementation working as intended? If not, where are the inefficiencies of public activities? → Are the costs getting out of control? → Who could be held accountable in case of mismanagement of EU Funds? → What has to change?</li> <li>• Are EU Funds devoted to the construction of the new sports hall fully absorbed? If not, why?</li> <li>• Which institutions/companies received th EU Funds for constructing the new sports hall?</li> <li>• Are there distributional conflicts? If so, which ones? → Is the ESSF category of fairness concerned here? If so, how?</li> <li>• Are there relevant financial interests? If so, by whom?</li> <li>• Are there indications of irregularities, fraud or corruption? → Are EU Funds devoted to the construction of the new sports hall entirely spent on this specific project, or also spent on other (unknown) expenditures/projects? → Are there close personal ties between certain involved stakeholders?</li> <li>• Which questions remain unanswered?</li> </ul>	
	<p><b>Evaluation</b></p>	<ul style="list-style-type: none"> <li>• How has the project of constructing a new sports hall in your home town/region been selected?</li> <li>• Has lobbying been involved in the selection process? If so, by whom?</li> <li>• Which goals have been pursued with the choice of this concrete project?</li> <li>• Has the construction of the new sports hall been successfully completed?</li> <li>• Have there been delays/irregularities in implementing the project?</li> <li>• Have the efficiency goals been met?</li> <li>• Have the fairness/distributional goals been met?</li> <li>• What has changed in your home town/region due to the construction of the new sports hall? Does the project have a real impact on your home town/region?</li> <li>• What has been accomplished with the implementation of the project, what has not worked out eventually?</li> <li>• In case of failures, what has led to them? And what could be improved the next time to avoid certain failures?</li> <li>• Which questions remain unanswered?</li> </ul>	
<p>5. Interviewing Experts</p>			
<p>6. Interviewing Victims</p>			
<p>7. Interviewing Agents</p>			

## Exercise 6 – Research Plan Update 4:

Stage of journalistic research process	Relevant information, sources, questions, contact persons	Further notes
<p>1. Consulting the Archives / 2. Screening the Data</p>	<ul style="list-style-type: none"> <li>• If you enter the keywords “sports hall” on the platform Kohesio, you get more than 900 results.</li> <li>• EU Cohesion Projects related to the construction or renovation of sports halls are or have been implemented all over the EU, for instance, in Croatia, France, Germany, Italy, Lithuania, Poland, Slovenia, Spain, and the Czech Republic.</li> <li>• The total project budgets range from several €10,000 to several €100,000, for instance, for the energetic refurbishment of various sports halls in Germany, Italy and Spain to almost €35 million for the reconstruction and extension of the Urania sports and entertainment hall in Olsztyn in Poland.</li> <li>• The EU’s share of financial contributions to such projects varies between 30% and 85%. Sometimes it is as high as 90% or more due to exemptions introduced during the COVID-19 pandemic. The remaining share is covered by contributions from the respective member state.</li> <li>• The EU’s financial contributions come from the European Regional Development Fund (ERDF), the European Social Fund (ESF) and the Cohesion Fund (CF).</li> <li>• Managing authorities are mainly government offices, ministries and municipalities.</li> <li>• Among the beneficiaries are primarily local authorities like counties and municipalities, but also companies, entrepreneurs and foundations.</li> <li>• The themes that are mainly addressed comprise low-carbon economy, educational and vocational training, and social inclusion.</li> <li>• In line with the investment priorities of the ERDF, ESF and CF, two EU Cohesion Policy objectives are primarily targeted here. On the one hand, it is objective 2: a greener, low carbon transitioning towards a net zero carbon economy. On the other hand, it is objective 4: a more social and inclusive Europe.</li> </ul>	

3. Deducing Interrelations



<p>4. Hypothesising the story</p>	<p><b>Selection</b></p>	<p>The guiding question in this phase should be the following:</p> <p><b>Is the construction of a new sports hall on the edge of a nature reserve economically efficient?</b></p> <p>In other words: <b>Is it really the right project to be implemented from an economic point of view?</b></p> <p>Further related questions could be these:</p> <ul style="list-style-type: none"> <li>• Which stakeholders are involved in the selection process of projects? Who is responsible for the final decision where and how funds are allocated?</li> <li>• Does it make any difference if the EU decides that a new sports hall will be built in your home town/region? What would be the ultimate (economic) benefit(s) of the new sports hall?</li> <li>• What about the financial feasibility of the project? Do the capacities for promotion even exist? → What would be the share of the EU's financial contributions, what would be the share of local/regional contributions? Could your home town take its share? → Is there a way to implement the project more cheaply?</li> <li>• Are there possibly relevant financial interests? If so, by whom?</li> <li>• Are the tender procedures conducted correctly and fairly? Or is there any indication of irregularities, fraud or corruption?</li> <li>• Where would EU Funds eventually end up? Who would build the new sports hall? Domestic or foreign firms? And who would deliver the individual components?</li> <li>• What could be potential consequences/knock-on effects of building a new sports hall on the edge of a nature reserve? → Would a new sports hall create or attract new jobs for people in the town/region? → What could happen to factors of production that are limited in your home town/region, for instance, the availability of land and workforce? → Could there be <b>crowding-out</b> effects of private investments due to public contributions? What about <b>crowding-out</b> effects on the local labour market and construction sector? → Would the project have been realised even without public funding? → Which price effects could be expected? Will prices potentially be distorted? → Could the construction of a new sports hall increase the productive potential of the town/region? → Could it increase the competitiveness of the town/region, for instance, by attracting big sports events and/or boosting tourism? → Could the project boost the innovative power of the town/region? Could it increase economic dynamics? → Could there be other secondary effects on the local/regional market? → Would there be follow-up costs that have to be covered in the future? If so, who would take them over? And would the respective actor be able to bear these costs? → Could there be other side effects or <b>externalities</b>?</li> </ul>	
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		<ul style="list-style-type: none"> <li>• Would the new sports hall improve or worsen the citizens' quality of life? And would the results be the same for everyone, or not?</li> <li>• Could the construction of the sports hall have detrimental impacts on the nearby nature reserve? For instance, could it harm certain endangered animal and plant species?</li> <li>• Are certain claims or interests of stakeholders justified and backed by facts?</li> <li>• How can economic, social and environmental interests be reconciled in the present case?</li> <li>• Is the construction of a new sports hall a key investment for your home town/region? Or are there other more necessary investments that should be arranged? <ul style="list-style-type: none"> <li>→ What are the <b>preferences</b>?</li> <li>→ How high are the <b>opportunity costs</b>?</li> <li>→ Could there be distributional conflicts between certain stakeholders? If so, between which ones?</li> <li>→ Could the ESSF category of fairness be concerned here? If so, how?</li> </ul> </li> <li>• Could the project have an impact on other economic sectors such as the real estate market or the agricultural sector?</li> <li>• Which questions remain unanswered?</li> </ul>	
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	<b>Construction</b>	<ul style="list-style-type: none"> <li>• Is the implementation working as intended? If not, where are the inefficiencies of public activities? → Are the costs getting out of control? → Who could be held accountable in case of mismanagement of EU Funds? → What has to change?</li> <li>• Are EU Funds devoted to the construction of the new sports hall fully absorbed? If not, why?</li> <li>• Which institutions/companies received the EU Funds for constructing the new sports hall?</li> <li>• Are there distributional conflicts? If so, which ones? → Is the ESSF category of fairness concerned here? If so, how?</li> <li>• Are there relevant financial interests? If so, by whom?</li> <li>• Are there indications of irregularities, fraud or corruption? → Are EU Funds devoted to the construction of the new sports hall entirely spent on this specific project, or also spent on other (unknown) expenditures/projects? → Are there close personal ties between certain involved stakeholders?</li> <li>• Which questions remain unanswered?</li> </ul>	
	<b>Evaluation</b>	<ul style="list-style-type: none"> <li>• How has the project of constructing a new sports hall in your home town/region been selected?</li> <li>• Has lobbying been involved in the selection process? If so, by whom?</li> <li>• Which goals have been pursued with the choice of this concrete project?</li> <li>• Has the construction of the new sports hall been successfully completed?</li> <li>• Have there been delays/irregularities in implementing the project?</li> <li>• Have the efficiency goals been met?</li> <li>• Have the fairness/distributional goals been met?</li> <li>• What has changed in your home town/region due to the construction of the new sports hall? Does the project have a real impact on your home town/region?</li> <li>• What has been accomplished with the implementation of the project, what has not worked out eventually?</li> <li>• In case of failures, what has led to them? And what could be improved the next time to avoid certain failures?</li> <li>• Which questions remain unanswered?</li> </ul>	
5. Interviewing Experts	<ul style="list-style-type: none"> <li>• Who is an expert?</li> <li>• What qualifies somebody to be/become an expert for a journalistic story?</li> <li>• Is an expert truly independent, or representing certain (powerful) interests?</li> <li>• Does an expert really know something about the topic at hand?</li> <li>• Which concrete information do you want to get from an expert?</li> </ul>		

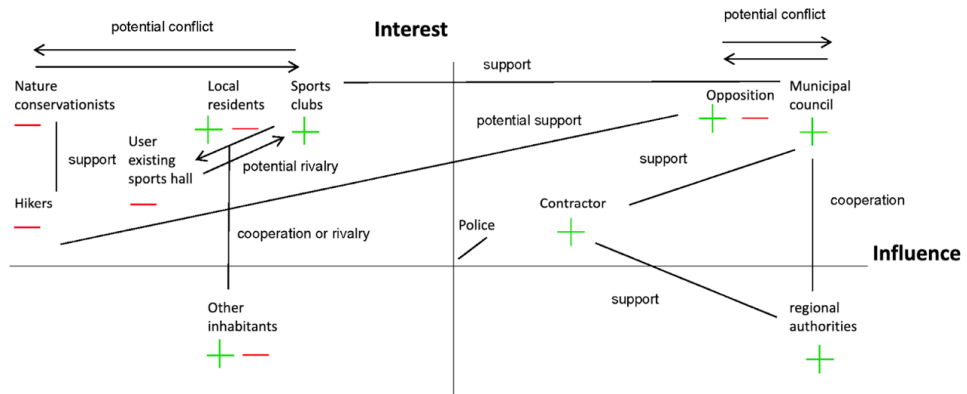
6. Interviewing Victims		
7. Interviewing Agents		

### Exercise 7 – Research Plan Update 5:

Stage of journalistic research process	Relevant information, sources, questions, contact persons	Further notes
1. Consulting the Archives / 2. Screening the Data	<ul style="list-style-type: none"> <li>• If you enter the keywords “sports hall” on the platform Kohesio, you get more than 900 results.</li> <li>• EU Cohesion Projects related to the construction or renovation of sports halls are or have been implemented all over the EU, for instance, in Croatia, France, Germany, Italy, Lithuania, Poland, Slovenia, Spain, and the Czech Republic.</li> <li>• The total project budgets range from several €10,000 to several €100,000, for instance, for the energetic refurbishment of various sports halls in Germany, Italy and Spain to almost €35 million for the reconstruction and extension of the Urania sports and entertainment hall in Olsztyn in Poland.</li> <li>• The EU’s share of financial contributions to such projects varies between 30% and 85%. Sometimes it is as high as 90% or more due to exemptions introduced during the COVID-19 pandemic. The remaining share is covered by contributions from the respective member state.</li> <li>• The EU’s financial contributions come from the European Regional Development Fund (ERDF), the European Social Fund (ESF) and the Cohesion Fund (CF).</li> <li>• Managing authorities are mainly government offices, ministries and municipalities.</li> <li>• Among the beneficiaries are primarily local authorities like counties and municipalities, but also companies, entrepreneurs and foundations.</li> <li>• The themes that are mainly addressed comprise low-carbon economy, educational and vocational training, and social inclusion.</li> <li>• In line with the investment priorities of the ERDF, ESF and CF, two EU Cohesion Policy objectives are primarily targeted here. On the one hand, it is objective 2: a greener, low carbon transitioning towards a net zero carbon economy. On the other hand, it is objective 4: a more social and inclusive Europe.</li> </ul>	



3. Deducing Interrelations



<p>4. Hypothesising the story</p>	<p><b>Selection</b></p>	<p>The guiding question in this phase should be the following:</p> <p><b>Is the construction of a new sports hall on the edge of a nature reserve economically efficient?</b></p> <p>In other words: <b>Is it really the right project to be implemented from an economic point of view?</b></p> <p>Further related questions could be these:</p> <ul style="list-style-type: none"> <li>• Which stakeholders are involved in the selection process of projects? Who is responsible for the final decision where and how funds are allocated?</li> <li>• Does it make any difference if the EU decides that a new sports hall will be built in your home town/region? What would be the ultimate (economic) benefit(s) of the new sports hall?</li> <li>• What about the financial feasibility of the project? Do the capacities for promotion even exist? <ul style="list-style-type: none"> <li>→ What would be the share of the EU's financial contributions, what would be the share of local/regional contributions? Could your home town take its share?</li> <li>→ Is there a way to implement the project more cheaply?</li> </ul> </li> <li>• Are there possibly relevant financial interests? If so, by whom?</li> <li>• Are the tender procedures conducted correctly and fairly? Or is there any indication of irregularities, fraud or corruption?</li> <li>• Where would EU Funds eventually end up? Who would build the new sports hall? Domestic or foreign firms? And who would deliver the individual components?</li> <li>• What could be potential consequences/knock-on effects of building a new sports hall on the edge of a nature reserve? <ul style="list-style-type: none"> <li>→ Would a new sports hall create or attract new jobs for people in the town/region?</li> <li>→ What could happen to factors of production that are limited in your home town/region, for instance, the availability of land and workforce?</li> <li>→ Could there be <b>crowding-out</b> effects of private investments due to public contributions? What about <b>crowding-out</b> effects on the local labour market and construction sector?</li> <li>→ Would the project have been realised even without public funding?</li> <li>→ Which price effects could be expected? Will prices potentially be distorted?</li> <li>→ Could the construction of a new sports hall increase the productive potential of the town/region?</li> <li>→ Could it increase the competitiveness of the town/region, for instance, by attracting big sports events and/or boosting tourism?</li> <li>→ Could the project boost the innovative power of the town/region? Could it increase economic dynamics?</li> <li>→ Could there be other secondary effects on the local/regional market?</li> <li>→ Would there be follow-up costs that have to be covered in the future? If so, who would take them over? And would the respective actor be able to bear these costs?</li> <li>→ Could there be other side effects or <b>externalities</b>?</li> </ul> </li> </ul>	
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		<ul style="list-style-type: none"> <li>• Would the new sports hall improve or worsen the citizens' quality of life? And would the results be the same for everyone, or not?</li> <li>• Could the construction of the sports hall have detrimental impacts on the nearby nature reserve? For instance, could it harm certain endangered animal and plant species?</li> <li>• Are certain claims or interests of stakeholders justified and backed by facts?</li> <li>• How can economic, social and environmental interests be reconciled in the present case?</li> <li>• Is the construction of a new sports hall a key investment for your home town/region? Or are there other more necessary investments that should be arranged? <ul style="list-style-type: none"> <li>→ What are the <b>preferences</b>?</li> <li>→ How high are the <b>opportunity costs</b>?</li> <li>→ Could there be distributional conflicts between certain stakeholders? If so, between which ones?</li> <li>→ Could the ESSF category of fairness be concerned here? If so, how?</li> </ul> </li> <li>• Could the project have an impact on other economic sectors such as the real estate market or the agricultural sector?</li> <li>• Which questions remain unanswered?</li> </ul>	
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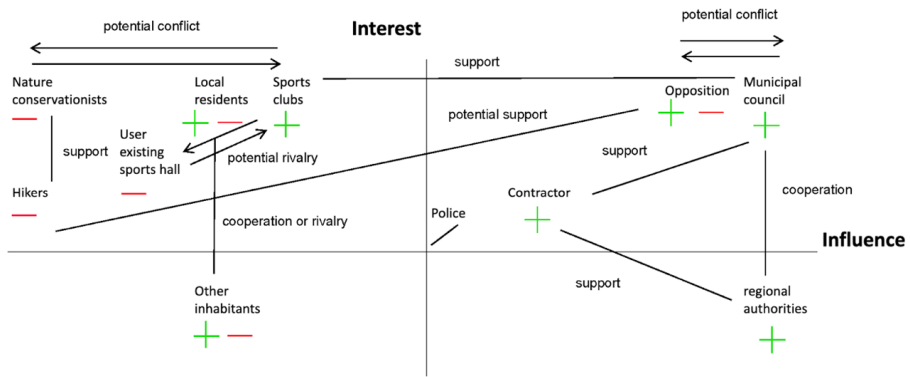
	<b>Construction</b>	<ul style="list-style-type: none"> <li>• Is the implementation working as intended? If not, where are the inefficiencies of public activities? → Are the costs getting out of control? → Who could be held accountable in case of mismanagement of EU Funds? → What has to change?</li> <li>• Are EU Funds devoted to the construction of the new sports hall fully absorbed? If not, why?</li> <li>• Which institutions/companies received the EU Funds for constructing the new sports hall?</li> <li>• Are there distributional conflicts? If so, which ones? → Is the ESSF category of fairness concerned here? If so, how?</li> <li>• Are there relevant financial interests? If so, by whom?</li> <li>• Are there indications of irregularities, fraud or corruption? → Are EU Funds devoted to the construction of the new sports hall entirely spent on this specific project, or also spent on other (unknown) expenditures/projects? → Are there close personal ties between certain involved stakeholders?</li> <li>• Which questions remain unanswered?</li> </ul>	
	<b>Evaluation</b>	<ul style="list-style-type: none"> <li>• How has the project of constructing a new sports hall in your home town/region been selected?</li> <li>• Has lobbying been involved in the selection process? If so, by whom?</li> <li>• Which goals have been pursued with the choice of this concrete project?</li> <li>• Has the construction of the new sports hall been successfully completed?</li> <li>• Have there been delays/irregularities in implementing the project?</li> <li>• Have the efficiency goals been met?</li> <li>• Have the fairness/distributional goals been met?</li> <li>• What has changed in your home town/region due to the construction of the new sports hall? Does the project have a real impact on your home town/region?</li> <li>• What has been accomplished with the implementation of the project, what has not worked out eventually?</li> <li>• In case of failures, what has led to them? And what could be improved the next time to avoid certain failures?</li> <li>• Which questions remain unanswered?</li> </ul>	
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<p>6. Interviewing Victims</p>	<ul style="list-style-type: none"> <li>• Who is directly affected by the construction of the new sports hall on the edge of a nature reserve? And in which way?</li> <li>• Who are the ones that should benefit from an EU Cohesion Project? And is this really the case?</li> <li>• Are EU Funds well-spent on this specific project?</li> <li>• Are there other more urgent/necessary projects to be implemented?</li> <li>• What do local citizens wish for? What should EU Funds improve in their lives?</li> <li>• Do local citizens also see disadvantages of EU Cohesion Funding in their town/region?</li> </ul>	
<p>7. Interviewing Agents</p>		

## Exercise 8 – Research Plan Update 6:

Stage of journalistic research process	Relevant information, sources, questions, contact persons
<p>1. Consulting the Archives /</p> <p>2. Screening the Data</p>	<ul style="list-style-type: none"> <li>• If you enter the keywords “sports hall” on the platform Kohesio, you get more than 900 results.</li> <li>• EU Cohesion Projects related to the construction or renovation of sports halls are or have been implemented all over the EU, for instance, in Croatia, France, Germany, Italy, Lithuania, Poland, Slovenia, Spain, and the Czech Republic.</li> <li>• The total project budgets range from several €10,000 to several €100,000, for instance, for the energetic refurbishment of various sports halls in Germany, Italy and Spain to almost €35 million for the reconstruction and extension of the Urania sports and entertainment hall in Olsztyn in Poland.</li> <li>• The EU’s share of financial contributions to such projects varies between 30% and 85%. Sometimes it is as high as 90% or more due to exemptions introduced during the COVID-19 pandemic. The remaining share is covered by contributions from the respective member state.</li> <li>• The EU’s financial contributions come from the European Regional Development Fund (ERDF), the European Social Fund (ESF) and the Cohesion Fund (CF).</li> <li>• Managing authorities are mainly government offices, ministries and municipalities.</li> <li>• Among the beneficiaries are primarily local authorities like counties and municipalities, but also companies, entrepreneurs and foundations.</li> <li>• The themes that are mainly addressed comprise low-carbon economy, educational and vocational training, and social inclusion.</li> <li>• In line with the investment priorities of the ERDF, ESF and CF, two EU Cohesion Policy objectives are primarily targeted here. On the one hand, it is objective 2: a greener, low carbon transitioning towards a net zero carbon economy. On the other hand, it is objective 4: a more social and inclusive Europe.</li> </ul>

3.  
Deducing  
Interrelations





<p>4. Hypothesising the story</p>	<p><b>Selection</b></p>	<p>The guiding question in this phase should be the following:</p> <p><b>Is the construction of a new sports hall on the edge of a nature reserve economically efficient?</b></p> <p>In other words: <b>Is it really the right project to be implemented from an economic point of view?</b></p> <p>Further related questions could be these:</p> <ul style="list-style-type: none"> <li>• Which stakeholders are involved in the selection process of projects? Who is responsible for the final decision where and how funds are allocated?</li> <li>• Does it make any difference if the EU decides that a new sports hall will be built in your home town/region? What would be the ultimate (economic) benefit(s) of the new sports hall?</li> <li>• What about the financial feasibility of the project? Do the capacities for promotion even exist? <ul style="list-style-type: none"> <li>→ What would be the share of the EU's financial contributions, what would be the share of local/regional contributions? Could your home town take its share?</li> <li>→ Is there a way to implement the project more cheaply?</li> </ul> </li> <li>• Are there possibly relevant financial interests? If so, by whom?</li> <li>• Are the tender procedures conducted correctly and fairly? Or is there any indication of irregularities, fraud or corruption?</li> <li>• Where would EU Funds eventually end up? Who would build the new sports hall? Domestic or foreign firms? And who would deliver the individual components?</li> <li>• What could be potential consequences/knock-on effects of building a new sports hall on the edge of a nature reserve? <ul style="list-style-type: none"> <li>→ Would a new sports hall create or attract new jobs for people in the town/region?</li> <li>→ What could happen to factors of production that are limited in your home town/region, for instance, the availability of land and workforce?</li> <li>→ Could there be <b>crowding-out</b> effects of private investments due to public contributions? What about <b>crowding-out</b> effects on the local labour market and construction sector?</li> <li>→ Would the project have been realised even without public funding?</li> <li>→ Which price effects could be expected? Will prices potentially be distorted?</li> <li>→ Could the construction of a new sports hall increase the productive potential of the town/region?</li> <li>→ Could it increase the competitiveness of the town/region, for instance, by attracting big sports events and/or boosting tourism?</li> <li>→ Could the project boost the innovative power of the town/region? Could it increase economic dynamics?</li> <li>→ Could there be other secondary effects on the local/regional market?</li> <li>→ Would there be follow-up costs that have to be covered in the future? If so, who would take them over? And would the respective actor be able to bear these costs?</li> <li>→ Could there be other side effects or <b>externalities</b>?</li> </ul> </li> <li>• Would the new sports hall improve or worsen the citizens' quality of life? And would the results be the same for everyone, or not?</li> <li>• Could the construction of the sports hall have detrimental impacts on the nearby nature reserve? For instance, could it harm certain endangered animal and plant species?</li> </ul>
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		<ul style="list-style-type: none"><li>• Are certain claims or interests of stakeholders justified and backed by facts?</li><li>• How can economic, social and environmental interests be reconciled in the present case?</li><li>• Is the construction of a new sports hall a key investment for your home town/region? Or are there other more necessary investments that should be arranged?<ul style="list-style-type: none"><li>→ What are the <b>preferences</b>?</li><li>→ How high are the <b>opportunity costs</b>?</li><li>→ Could there be distributional conflicts between certain stakeholders? If so, between which ones?</li><li>→ Could the ESSF category of fairness be concerned here? If so, how?</li></ul></li><li>• Could the project have an impact on other economic sectors such as the real estate market or the agricultural sector?</li><li>• Which questions remain unanswered?</li></ul>
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	<p><b>Construction</b></p>	<ul style="list-style-type: none"> <li>• Is the implementation working as intended? If not, where are the inefficiencies of public activities? <ul style="list-style-type: none"> <li>→ Are the costs getting out of control?</li> <li>→ Who could be held accountable in case of mismanagement of EU Funds?</li> <li>→ What has to change?</li> </ul> </li> <li>• Are EU Funds devoted to the construction of the new sports hall fully absorbed? If not, why?</li> <li>• Which institutions/companies received the EU Funds for constructing the new sports hall?</li> <li>• Are there distributional conflicts? If so, which ones? <ul style="list-style-type: none"> <li>→ Is the ESSF category of fairness concerned here? If so, how?</li> </ul> </li> <li>• Are there relevant financial interests? If so, by whom?</li> <li>• Are there indications of irregularities, fraud or corruption? <ul style="list-style-type: none"> <li>→ Are EU Funds devoted to the construction of the new sports hall entirely spent on this specific project, or also spent on other (unknown) expenditures/projects?</li> <li>→ Are there close personal ties between certain involved stakeholders?</li> </ul> </li> <li>• Which questions remain unanswered?</li> </ul>
	<p><b>Evaluation</b></p>	<ul style="list-style-type: none"> <li>• How has the project of constructing a new sports hall in your home town/region been selected?</li> <li>• Has lobbying been involved in the selection process? If so, by whom?</li> <li>• Which goals have been pursued with the choice of this concrete project?</li> <li>• Has the construction of the new sports hall been successfully completed?</li> <li>• Have there been delays/irregularities in implementing the project?</li> <li>• Have the efficiency goals been met?</li> <li>• Have the fairness/distributional goals been met?</li> <li>• What has changed in your home town/region due to the construction of the new sports hall? Does the project have a real impact on your home town/region?</li> <li>• What has been accomplished with the implementation of the project, what has not worked out eventually?</li> <li>• In case of failures, what has led to them? And what could be improved the next time to avoid certain failures?</li> <li>• Which questions remain unanswered?</li> </ul>
<p>5. Interviewing Experts</p>		<ul style="list-style-type: none"> <li>• Who is an expert?</li> <li>• What qualifies somebody to be/become an expert for a journalistic story?</li> <li>• Is an expert truly independent, or representing certain (powerful) interests?</li> <li>• Does an expert really know something about the topic at hand?</li> <li>• Which concrete information do you want to get from an expert?</li> </ul>

6. Interviewing Victims	<ul style="list-style-type: none"><li>• Who is directly affected by the construction of the new sports hall on the edge of a nature reserve? And in which way?</li><li>• Who are the ones that should benefit from an EU Cohesion Project? And is this really the case?</li><li>• Are EU Funds well-spent on this specific project?</li><li>• Are there other more urgent/necessary projects to be implemented?</li><li>• What do local citizens wish for? What should EU Funds improve in their lives?</li><li>• Do local citizens also see disadvantages of EU Cohesion Funding in their town/region?</li></ul>
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<p>7. Interviewing Agents</p>	<ul style="list-style-type: none"> <li>• Who manages EU Funds (on site)? Who decides where EU Funds ultimately go?</li> <li>• Who can be held accountable for the implementation of a specific EU Cohesion Project?</li> <li>• Who is responsible for the actual realisation of the project? Who delivers the materials, components, and so on?</li> <li>• Are there signs of misconduct, conflicts of interest, or favouritism?</li> </ul> <p>Potential contact partners on the EU side are:</p> <p>→ the EC's spokesperson's service</p> <p>→ the EC Representations in the individual EU member countries</p> <p>→ the Liaison offices of the European Parliament in the individual EU member countries: Through these offices, you can get in touch with local members of the European Parliament (MEPs) who often know the projects very well and can tell you something about their story. The Liaison offices can also put you in contact with the EP Committee on Regional Development (REGI).</p> <p>→ the European Committee of the Regions (CoR)</p> <p>→ the EU Regional Offices</p> <p>Other important sources are the individual member states' authorities on national, regional and local level:</p> <p>→ managing authorities implementing EU Cohesion Projects on site such as ministries</p> <p>→ city councils, municipalities, and other local and regional partners</p> <p>→ The first points of contact are often the respective press offices.</p> <p>When it comes to the monitoring and evaluation of EU Cohesion Policy, a further interesting source could be monitoring committees (MCs). Third parties like academics, associations, NGOs and trade unions can be invited to participate in these committees, and discuss the implementation, effectiveness and performance of EU Cohesion Policy Programmes.</p> <p>Last but not least, the companies involved in building the new sports hall are also relevant contact partners.</p>
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# Module 10 – Getting the Facts Right in Cohesion Policy Coverage

## Basic Information

Module number	10
Module title	Getting the facts right in Cohesion Policy coverage
Duration/study load	8 hours
Keywords	disinformation, fact-checking, false news, fake news, flowchart, journalism, malinformation, media literacy, misinformation, social media
Learning outcomes	<p>At the end of the module, you should:</p> <ul style="list-style-type: none"> <li>• be able to understand the premises of information verification, and the importance of verification in journalism practice;</li> <li>• be able to understand the importance of fact-checking in media literacy of the audience;</li> <li>• be able to show multiple perspectives on false news, by identifying misinformation, disinformation, and malinformation;</li> <li>• be able to analyse and distinguish various forms of information and sources on the EU Cohesion Policy, in terms of relevance and reliability, using a flowchart supported process of fact-checking.</li> </ul>
Description	<p>Module 10 is dedicated to fact-checking and the spread of false news. In this module you will acquire insight into the differences between misinformation, disinformation and malinformation. Online instruction and exercises/quizzes will take you through the process of fact-checking described in the flowchart of the EUfactcheck methodology. An example from the EUfactcheck website will show you the result of the fact-checking process. A flowchart and worksheet will help you to fact-check.</p> <p>You will gain experience with the first phase of fact-checking by identifying relevant claims about European Cohesion Policy in media outlets and social media. Using journalism research to find and check these claims you will experience and understand the challenges of fact-checking EU Cohesion Policy. After completing this module, you can take the next step by fact-checking a relevant claim yourself. The next module (11) will give more insight into useful data research techniques.</p> <p>The outcomes of fact-checking can be input for several genres (fact checks, explainer videos, fact boxes, infographics) and can contribute to more fact-based coverage of European Cohesion Policy, as offered in modules 7 and 8.</p>

Sequentiality	Basic knowledge of EU and Cohesion policy (modules 1-4) and basic research skills (module 9) are required. Module 11 will follow up on this module with more in depth data research skills to also conduct fact-checking.
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## Glossary

Disinformation	The deliberate spread of false or misleading information, with a specific intent to deceive the audience.
Information disorder	A general concept, encompassing various forms of inaccurate information that can lead to confusion.
Fact-checking	The process of verifying the validity and accuracy of information that is presented as being factual, to determine its truthfulness.
False news	Fabricated or misleading information, presented as factual news.
Fake news	The dissemination of fabricated or misleading information. Although <i>fake news</i> and <i>false news</i> are often used interchangeably, <i>false news</i> is a more accurate option since <i>fake news</i> has been misused and overused.
Fact-checking flowchart	A methodology for fact-checking, consisting of a flowchart in three steps, developed by the European Journalism Training Association (EJTA), for the EUfactcheck project.
Journalism	Generally, it is the process of researching, investigating, and reporting events, issues, and stories that are of public interest and relevance.
Malinformation	Deliberately misleading or inaccurate information that is shared with the intent to harm someone or a group, usually by damaging their reputation or credibility.
Media literacy	A set of skills that enhance the ability to spot false news, to verify information and sources, to make a difference between reliable and unreliable sources.
Misinformation	False or inaccurate information, that is spread unintentionally, but has the potential to deceive.
Social media	Online platforms, that facilitate the creation and exchange of user-generated content. Individuals use these networks to communicate, interact, engage, or participate.

## About this Module

Welcome to this module on fact-checking within the realm of the EU Cohesion Policy! In today's world, where information spreads at lightning speed and anyone with an internet connection can publish news and opinions, it's more important than ever to be able to distinguish between facts and fiction. As journalists, you will encounter situations where you will need to orientate through a flood of information to get to the truth.

“There are no facts, only interpretations.” These famous words by Friedrich Nietzsche point to an important first lesson in journalism: facts matter, but context even more. Context influences the meaning of facts and can lead to misinterpretation and even false values. So, in this module you will first acquire insight into the differences between misinformation, disinformation and malinformation (often called fake news). You will get to recognise the differences to help you fact-check claims and statements about the EU Cohesion Policy, in media and in documents.

Online instruction and exercises and quizzes will take you through false news and media literacy basics, along with the fact-checking process, described in the flowcharts of the EUfactcheck methodology, developed by the European Journalism Training Association (EJTA). An example from the EUfactcheck website will show you the result of the fact-checking process. Worksheets of the flowchart are available to help you do it yourself.

We will also be presenting you with various scenarios where you will need to navigate through **misinformation, disinformation, and malinformation** to find the truth. We will equip you with the information and techniques to evaluate sources, identify red flags, and verify the accuracy of claims.

By the end of this module, you will have gained valuable skills in critical thinking and media literacy. You will be better prepared to separate facts from fiction and make informed decisions based on reliable information.

## Introduction to the story of this module

Imagine that you are a young reporter, at the beginning of your career, working for a news website. You are interested in European policies and institutions, and you have just been assigned to cover topics related to the EU Cohesion Policy. You are excited to dive into the subject and provide your readers with accurate and informative content.

As you start the research for various topics, you come across an abundance of statements, articles and social media posts that claim all sorts of opposing facts, and for some reason, some of them do not gain your trust. You soon realise that your job will not be easy.



Figure 138: The journey is on!; Source: Dariusz Sankowski on Unsplash

You're passionate about your work and strive to provide accurate and trustworthy information to your readers. As a responsible journalist, you know that it's your duty to navigate through all the information out there and to distinguish the correct and relevant facts, to be able to separate truth from fiction.

So, get ready to put your investigative skills to the test and dive into the world of fact-checking!

## How well can you spot false news?

### Exercise 1:

Let's begin the journey through correct and questionable information with a few questions.

During an editorial meeting, the editors bring several situations to the reporters' attention. For each of them, choose the option that you consider as being the correct journalistic approach.

1. A local public institution sends you a press release, in which it claims that it will no longer try to access European funds for the development of its community, because the territory is no longer covered by the measures in the EU Cohesion Policy. Which is your first step?
  - a. You publish the news, because the information comes from a public institution, so it is official and true.
  - b. You start calling specialists to confirm the information.
  - c. You check the information within the EU Regional and Urban Development section on the European Commission website.
2. A post on social media, which went viral and was even picked up by some international media institutions, claims that companies that use carbon-based fuels can access European funds with easy conditions.
  - a. Your first instinct is to check the information, because you know that the transition to a green and carbon-free economy is one of the basic principles of the EU Cohesion Policy.
  - b. Considering that prestigious media institutions have shared the information, there is no need to hesitate in taking it over as well, considering that those journalists are more experienced than you, so they have certainly verified the information.
  - c. What private companies do does not concern the general public. This topic is not of interest, therefore it will not become news.
3. A post on the Government's Facebook page presents the country as being in the top 5 states with the most significant regional development, citing a EU Cohesion Report as the source, without providing a link. Naturally, the information is automatically picked up by many of the national media institutions. What would you do?
  - a. You can trust the Government; they could not afford publishing made-up information.
  - b. You do not necessarily doubt the information, but you still choose to find the report and check all the data, just to be sure that there is not another side of the story that was left out, such as the disparity between regions. The fact that the post did not provide the link is a red flag.
  - c. You should never use the Government as a source for information about the EU, so you will ignore the respective post.

The solution to this exercise can be found at the very end of this module.

Now that you have taken part in these discussions with the editors, things are starting to become clearer for you. However, let's see the types of problematic information that you might face in your daily work.

### Fake news - definition

You have surely heard the term *fake news* all over the internet and in the public sphere. But did you know that this term is misused a lot, and not only because of ignorance but also deliberately to frame others as “fake and unreliable”?

So, take a moment to ask yourself what you think fake news is. If you can, ask your friends, and see if they can define it. Then look for information on the internet and check your own perceptions and your friends ideas. What did you find?



Figure 139: False news implies content in a variety of forms; Source: Pixabay

In the UNESCO handbook on Journalism, “[Fake News and Disinformation](#)” the authors state that “Fake news” today is so much more than a label for false and misleading information, disguised and disseminated as news. It has become an emotional, weaponised term used to undermine and discredit journalism. For this reason, the terms misinformation, disinformation and “information disorder”, (Wardle and Derakhshan, 2018) are preferred.

#### Exercise 2:

Before you take a closer look at these three types of false information, find the definitions online and fill in the table below.

Term	Definition
Misinformation	
Disinformation	
Malinformation	

The solution to this exercise can be found at the very end of this module.

More info on: [Media Defence, module 8 - “False news”](#)

## False news categories: Misinformation



Now that you have a basic understanding of what false news might be, let's dive into its variations and subtleties.

Misinformation refers to information that is inaccurate or distorted may exist without the specific intention to mislead ([Wardle & Derakhshan, 2018, p. 46](#)).

*Figure 140: Sometimes, not providing the whole information may result in false news!; Source: Pixabay*

[Scheufele and Krause \(2019\)](#) propose three levels of analysis to understand the emergence and persistence of misinformation:

- **Individual level:** refers to the capability and/or motivation of individuals to recognize misinformation, along with their emotional state.
- **Group level:** pertains to the tendency of attitudes and beliefs to persist within homogeneous groups, where individuals can influence each other.
- **Societal level:** relates to social issues, such as social capital, social inequalities, and political polarisation. The communication dynamics in online media play a crucial role in shaping public opinion at this level.

Froehlich (2020) identifies seven distinct categories of false news, misinformation being one of them. However, there are other categories that are strongly related:

- missing information - content lacking completeness, making it impossible to understand the facts. The absence of information can stem from negligence, incompetence, or an intention to deceive. The latter implies a specific intention to misinform, which makes it disinformation (to be explained next).
- ignorance - lacking knowledge can translate into creating or spreading false information.
- satire or parody - content that has the potential to fool, although it does not have a clear intention to present the information as being true. However, the fact that an article is a parody is not always clear (especially when it presents statements of well-known figures or refers to real events), so they fall under the category of false news.

## False news categories: Disinformation

Disinformation has a clear intention to deceive, by supplying misinformation or lies. The author of this information understands it is false, and it may provide false context and impostor, manipulated or even fabricated content ([Wardle & Derakhshan, 2018](#)). The information may be deliberately created to harm a person, social group, organisation, or country.



*Figure 141: Disinformation is usually intentional; Source: Pixabay*

The era of disinformation includes multiple aspects, including:

- the use of disinformation as a political tactic across various forms of media;
- the deliberate assault on trustworthy information, grounded in facts, logic, and evidence, exacerbated by a political system that labels opposing views as "fake news" if they do not align with the current political establishment ([Froehlich, 2020](#)).

Those who fall victim to disinformation not only lack reliable information, but also often hold the belief that only their own "facts" are valid, dismissing contradictory perspectives.

Other categories of fake news in [Froehlich`s](#) taxonomy, that can be linked to disinformation, are lies and paltering. Before reading on, take a few minutes, access the source and try to understand the definitions of the two concepts on p. 39-40.

Here are the definitions:

- lies - falsehoods presented in a convincing manner, deliberate misinformation that is spread through various channels, such as social media or news outlets;
- paltering - making truthful statements while deliberately omitting or concealing important information to mislead the listener. Unlike lying, where the speaker says something they know to be false, in paltering the speaker uses truthful statements to give a false impression. Paltering can also involve the use of ambiguous language or other manipulative techniques.

### **False news categories: Malinformation**



Now that you know the difference between misinformation and disinformation, try reflecting on what malinformation might mean. Once you find an answer, check out what [Wardle & Derakhshan](#) say on p. 44-45. Take your time to think and read.

Ready? Now let's dive into the problem!

*Figure 142: Malinformation has the clear intent to inflict harm; Source: Pixabay*

Malinformation refers to information that is based on reality, used to inflict harm on a person, social group, organisation, or country. Unlike disinformation, which is completely fabricated information, malinformation is based on true events or facts, but is selectively presented or manipulated to serve a particular agenda.

Malinformation can take many forms, including selectively edited videos or quotes, misleading headlines, and propaganda designed to manipulate public opinion. Malinformation can be difficult to identify and refute because it contains elements of truth. However, it can be harmful because it can mislead people and create division or mistrust, and that is why it is important to verify the accuracy of information and sources before sharing or acting on it.

As Wardle and Derakhshan (2018, p. 46) emphasise, differentiating between true and false information is not enough in today's media landscape. It is equally important to identify messages that have some degree of truth but have been produced or disseminated by agents with the intent to deceive or harm the public. This is a violation of ethics and so is the dissemination of information that affects a person's privacy without any public interest justification.



Journalists must uphold ethical standards that prioritise the public interest over any individual or organisational agenda. This means avoiding the spread of malinformation and protecting individual privacy unless there is a compelling public interest justification. Journalists must also be vigilant in their efforts to identify and combat malinformation by evaluating sources and evidence, fact-checking claims, and being transparent about the origin and intent of the information they present to the public. By adhering to these ethical standards and combating malinformation, journalists can ensure that the public is accurately informed.

Despite false news not being a novel issue, the emergence of modern technologies and digital media has introduced new complexities in the realm of communication. The proliferation of information and its rapid dissemination necessitates heightened awareness of the significance of critical thinking and media literacy. There is an increased need to improve individuals' ability to decipher messages accurately, detect any type of false news, and verify their authenticity.

Fake news is the result of a complex process, thus providing a universal and exhaustive definition is difficult. As a general concept, “fake news refers to all kinds of false stories or news that are mainly published and distributed on the Internet, in order to purposely mislead, befool or lure readers for financial, political or other gains” ([Zhang & Ghorbani, 2019](#)).

Gelfert ([2018, p. 108](#)) examines various aspects of the fake news concept and puts forth a definition of this phenomenon, stating that it involves the intentional dissemination of false or deceptive claims presented as news. Gelfert highlights that the misleading nature of these claims is deliberately designed, and is achieved through the use of news production and presentation techniques.

### **[Fake] news and social media**

For journalists, social media represents a valuable source of information. Journalists can use these platforms to gather information, track emerging stories, and stay updated on current events. They can follow individuals, organisations, and official accounts to receive real-time updates and access a wide range of perspectives. Social media platforms also allow journalists to connect with potential sources, reach out to experts, and engage in discussions on various topics.

Social media serves as a significant source of information for the audience and allows them to share the information they find relevant or interesting.

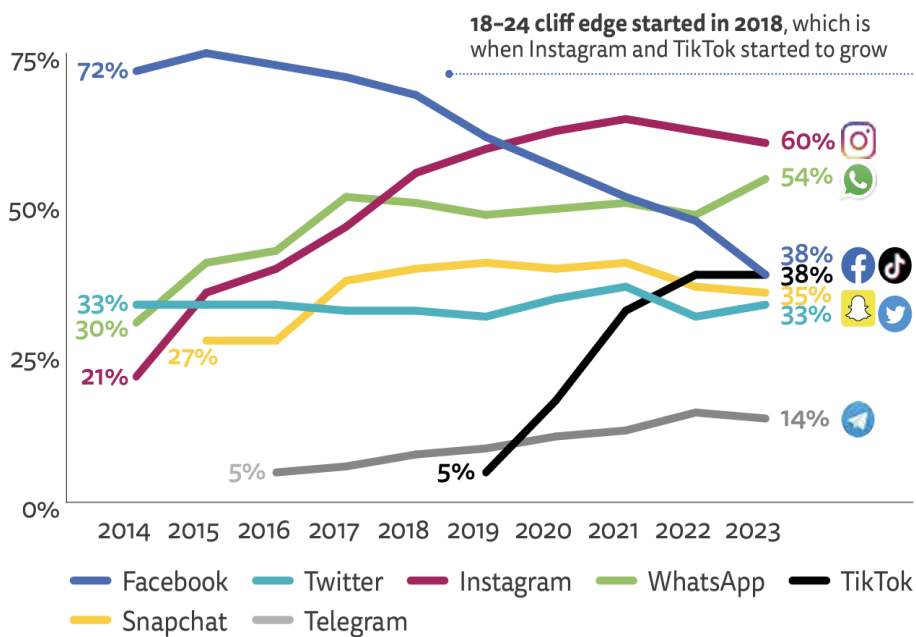
Social media platforms also provide a space, in which journalists and media professionals can connect, collaborate, and exchange information. These platforms offer various features and tools that facilitate communication and interaction, but they also favour the spread of false news.

In conclusion, media education is essential for both journalists and the audience, as it equips them with the necessary skills to navigate the vast landscape of social media. Media education enables journalists to harness social media's potential as a valuable source of information while discerning the reliability of content, and empowering the audience to critically evaluate and engage with the information they encounter, promoting a more informed and responsible media ecosystem.

This is what the [Digital News Report](#), one of the most complex research on media consumption, shows about consuming news on social media:



## PROPORTION OF 18–24s THAT USE EACH SOCIAL NETWORK FOR ANY PURPOSE IN THE LAST WEEK (2014–2023) – AVERAGE OF SELECTED COUNTRIES

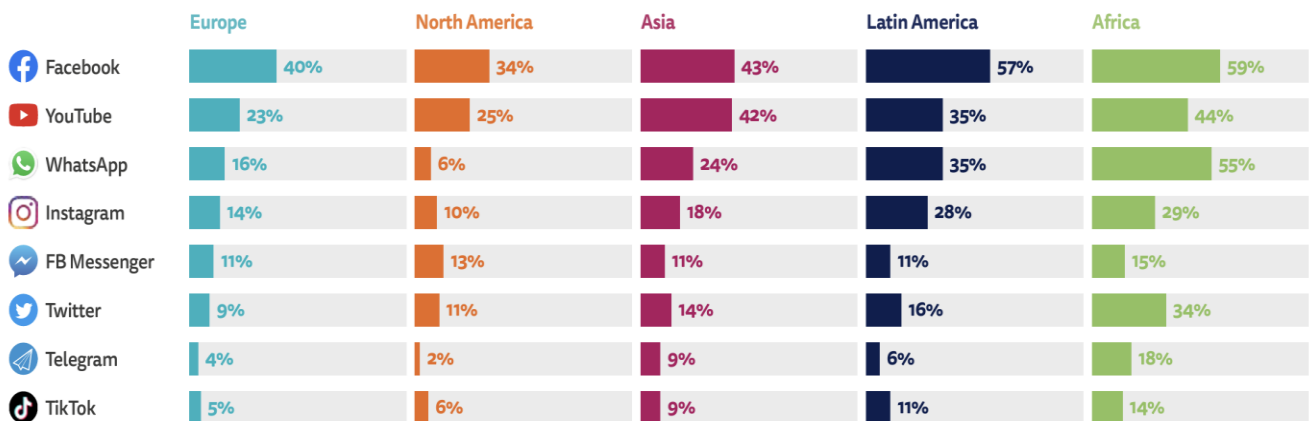


**Q12A.** Which, if any, of the following have you used for any purpose in the last week? Base: 18–24s in each country-year in UK, USA, Germany, France, Spain, Italy, Ireland, Denmark, Finland, Japan, Australia, Brazil, and Ireland ≈ 200. Note: No data from Australia or Ireland in 2014.

Figure 143: Usage of social networks for news, in 2014–2023; Source: Digital News Report 2023

As the data above shows, in 2023, Facebook was the most popular social network, in terms of news consumption, followed by YouTube, WhatsApp, and Instagram. Even though Facebook’s popularity has consistently decreased, it still is on the top. Instagram has significantly increased in the past years, and so did TikTok.

## PROPORTION THAT USED EACH SOCIAL NETWORK FOR NEWS IN THE LAST WEEK – SELECTED REGIONS



**Q12B.** Which, if any, of the following have you used for news in the last week? Base: Total sample in each region. Europe = 48,836, North America = 4048, Asia = 20,349, Latin America = 12,104, Africa = 6057. Note: Africa average is Kenya, South Africa, and Nigeria only (English speakers in South Africa and Nigeria).

Figure 144: Usage of social networks for news, in 2022, across regions; Source: Digital News Report 2022

### Exercise 3:

A comparison across regions indicates some differences regarding the use of social platforms for news consumption in 2022. Spot these differences, by filling in the blanks below:

\_\_\_\_\_ is the most used social network for news consumption across all five continents, including Europe. Another popular platform in Europe is \_\_\_\_\_, with 23% of the respondents using it for news. Similar to other continents, the least favourite social network across Europe is \_\_\_\_\_ and so is TikTok. WhatsApp has a significant score in \_\_\_\_\_, and so does Instagram, which does well in Latin America.

The solution to this exercise can be found at the very end of this module.

Finally, the Digital News Report 2023 shows a substantial increase in popularity for TikTok, for both news and general consumption, especially among younger groups in some Asia-Pacific, Latin American, and African countries. The highest usage for news was reported in Peru (30%), Thailand (30%) and Kenya (29%), while Denmark, Japan and Germany have reported the lowest adoption (2-3%).

### The role of social media in spreading false information

In analysing the spread of false news, it is essential to consider the role of social media networks. As profit-driven businesses, these companies use algorithms to keep users engaged on their platforms for as long as possible. This is achieved by offering content that aligns with users' interests and beliefs, which often confirms rather than challenges their existing views. This can lead to the spread of false news, as users are more likely to engage with and share content that confirms their pre-existing beliefs.



Figure 145: Social media and the spread of false news; Source: [Image by Freepik](#)

**The filter bubble** is a phenomenon that affects every social media user, where content is personalised according to their interests, without them even realising it. The social networks prioritise engaging content, that generates reactions, and false news usually triggers strong emotions and reactions, making it more likely to gain visibility on social media (Vosoughi, et al., 2018). This creates a vicious cycle, in which problematic content goes viral and spreads at an incredible speed, and even if fact checkers prove the information to be false, it is difficult to reverse the process or to gain the same visibility for the corrected information.

Froehlich (2020) emphasises some key-aspects regarding social media:

- These platforms are the places in which false news can be found, exchanged, and spread. They “cultivate, support, and perpetuate disinformation” and conspiracies.
- Although social media platforms may have policies and guidelines against various problematic information, strict regulation is difficult, as they operate within the mandate of free speech.
- The fact that the users can be led down a path of narrow and over personalised content results in so-called rabbit holes, where they receive content based on past behaviour and interests,

including conspiracy theories or hate speech. The rabbit hole effect is particularly harmful when it comes to the spread of false news, as users can be trapped in an echo chamber marked by misinformation.

While some social media platforms have implemented fact-checking or content moderation measures, they have faced criticism for being too slow or ineffective in addressing false information or harmful content. In addition, the issue of censorship and the potential for abuse of power by those in charge of regulating content remains a concern. Therefore, the balance between freedom of expression and the need for accountability and responsible use of social media remains a challenging issue.

As Kimiz Dalkir says, in the introduction of *Navigating Fake News, Alternative Facts, and Misinformation in a Post-Truth World*, social media is “here to stay, and we will likely continue to share content with our online communities”. Every single social media user needs strong fact-checking skills, but journalists also have the responsibility of correcting further information of the public.

#### **Exercise 4 – Assessment:**

Back to your work as a journalist. Now you are aware that it is extremely important for you to check the correctness of each information you get in contact with.

Match the descriptions below with the six false news categories:

1. Telling the truth, but not the whole truth, to mislead or create a false impression.
2. Incorrect, distorted information, without necessarily having the purpose to mislead.
3. Information that is based on reality but used to inflict harm on someone.
4. False content, created with a humorous intent, as political and social commentary.
5. Intentionally supplying misinformation or lies, with a clear intention to deceive.
6. Incomplete and inaccurate information. Essential details or pieces of data are not available, which makes it difficult or impossible to understand or the facts correctly.
  - a. satirical news
  - b. malinformation
  - c. missing information
  - d. paltering
  - e. disinformation
  - f. misinformation

The solution to this exercise can be found at the very end of this module.

Now that you are aware of the various problematic information and you are ready to differentiate between them, you may predict the importance of media literacy and fact-checking. Let's focus on that next!

### **What is media literacy and why is it important, in the context of EU Cohesion Policy?**

Europe needs a critical constituency that is well-informed and actively engaged in understanding and shaping EU Cohesion Policy. For a journalist covering this complex policy area, media literacy is of great importance. It enables the journalist to navigate through policy details, critically evaluate sources, communicate complex information effectively, promote transparency and accountability, counter misinformation, and engage the audience in meaningful discussions. Media literacy empowers journalists to provide accurate, comprehensive, and accessible coverage, fostering an informed public discourse that is essential for the successful implementation and evaluation of EU Cohesion Policy.



As a journalist, you should be equipped with essential skills to critically analyse and evaluate the credibility of the information you pass on. Journalists must have media education, because it empowers them to differentiate between facts and malicious content, understand the intention behind the messages they receive, and be able to identify potential biases and manipulations.

*Figure 146: In an abundance of information, media education is essential; Source: Pixabay*

Media and Information Literacy (MIL) is an umbrella concept used by [UNESCO](#) to encompass a range of skills necessary for identifying problematic information. These skills include human rights literacy, news literacy, advertising literacy, and computer literacy. By developing these skills, individuals can better navigate the information society and critically evaluate the information they encounter, including identifying and avoiding false news ([Abu-Fadil, 2018, p. 74](#)). Ultimately, MIL is about empowering individuals to be informed and engaged citizens who can make sense of the world around them and participate in a democratic society ([Jones-Jang et al., 2021, p. 373](#)).

### **Fact-checking: main techniques and premises**

Before you move to the more practical part of this module it's a good idea to take a breather. This has been a lot of information: on types of false information, on media literacy, on the importance of getting the facts right. It must be making you dizzy...

While you can't see the wood for the trees, take a moment to think how you can use your newly acquired knowledge to distinguish right from wrong. In other words, how you can check the facts!



*Figure 147: In a climate of information pollution, fact-checking is an essential tool for democracy; Source: Pixabay*

A more scientific explanation tells you that:

Fact-checking involves verifying the correctness and trustworthiness of public statements made by dignitaries, both political and public or the media. It implies the use of various sources to assess the accuracy and degree of truth of a statement or information in the public discourse.

Media professionals who verify such information use specific tools and techniques, including consulting relevant data, checking sources, and talking to experts. Fact-checkers also pay particular attention to the political and social context in which the claim was made.

Fact-checking promotes the accuracy of information and the transparency of the public discourse, and actively contributes to stopping the spread of false and misleading information. "Fact-checking is the process of verifying the accuracy of claims made in public discourse or news reporting, typically by reviewing primary sources and other evidence." ([Oxford Research Encyclopedia of Communication, 2020](#)).

In the [Information Disorder Glossary](#), you can find this definition:

“Fact-checking (in the context of information disorder) is the process of determining the truthfulness and accuracy of official, published information such as politicians’ statements and news reports. Fact-checking emerged in the U.S. in the 1990s, as a way of authenticating claims made in political ads airing on television.“

### **The importance of fact-checking. Relevant fact-checking outlets.**



*Figure 148: Fact-checking promotes the accuracy of information and the transparency of public discourse; Source: Pixabay*

The convergence of the internet and social media has led to an explosion of misinformation and disinformation and increased the need for more comprehensive fact-checking. In response, many fact-checking outlets have been established in the past two decades.

Some of the most well-known and trusted fact-checking media organisations are [Politifact](#), [FactCheck.org](#), or [Snopes](#). In Europe, [Full Fact](#) (UK), [Les Décodeurs](#) (France), [Pagella Politica](#) (Italy) and [EUfactcheck](#) (an international collaborative project) are some of the most relevant such outlets. In addition to the media organisations that focus entirely on fact-checking, many traditional outlets have fact-checking departments or sections of content.

Although the global boom in fact-checking ([Kessler, 2014](#)) started being discussed in the last decade, fact-checking as a journalistic practice is older than that. In the US, media organisations started including corrections of their previous articles in the early 20th century. Citizen and professional organisations concerned with media bias and the truthfulness of public statements started being established in the 1960s.

Since presenting inaccurate or misleading information to the public can have negative consequences, fact-checking is crucial in fields such as journalism and is an important process for society. Fact-checking promotes transparency by holding media and public figures accountable for their comments and fosters trust between citizens and those in leadership positions or the media.



By promoting a more educated and analytical approach to the truthfulness of public statements, fact-checking encourages critical thinking, and can thus help people make more informed decisions and judgments.

### The process of fact-checking: tools and techniques (EUfactcheck)

In recent years several tools for fact-checking have been developed by academia and industry. Most methodologies work in the same way, following a process of analysis from a presumed false claim or statement, through research into sources, to finally come up with a conclusion about the truth. This conclusion is often visualised in an icon.

In chapter 4 of this module, you can put your knowledge to practise by using the EUfactcheck methodology, which was specially developed by and for education.



Figure 149: Many fact-checking outlets have been established in the past two decades; Source: Pixabay

In a project by [EJTA](#), journalism schools and training institutes in Europe have developed a three step methodology to check claims and statements made in the media or in documents.

At the European level, the EC's [EDMO project](#) is aiming to play "a crucial role in mapping disinformation. The regional hubs analyse disinformation campaigns, organise media literacy activities, and support local media and authorities. They provide a clearer picture of the situation at the national and regional level to promote the fight against disinformation", as stated by professor Miguel Poiaras Maduro, chair of the EDMO Board of Directors.

### The limitations and challenges of fact-checking



Figure 150: Fact-checking challenges include time and effort and the opacity of public institutions and figures; Source: Pixabay

Although an essential part of public discourse, there are several challenges and limitations that come with the fact-checking process.

One of the most common problems has to do with the limited impact of fact-checking articles. Although they can debunk inaccurate information in public discourse, many fact-checking organisations do not have the same effect as news outlets.

The problem is further complicated by the fact that audiences are more inclined to consume information that aligns with their beliefs and values. From this perspective, fact-checking

media organisations can be perceived as biased, especially when they focus on political issues. Meeting the information needs of people across the political spectrum can be a difficult task, especially when it comes to disputed realities ([Marietta et al 2015](#)). Several authors claim that fact-checking websites can be biased or flawed ([Ostermeier 2011](#), [Uscinski 2015](#)).

Another important issue relates to the awareness that fact-checking can be a time- and resource-consuming effort. This can become a problem, especially when fact-checking media organisations operate with limited budgets and teams. In such a case, covering a wide range of public statements can prove to be a tough job.

## The future of fact-checking

In this age of information abundance, fact-checkers may find it difficult to keep up with the volume of information being produced and may struggle to reach an audience that gets its news primarily through social media. Other limitations may be related to the opacity or inaccessibility of public institutions and other types of sources, and that addressing complex issues that do not have a clear answer and require a more nuanced discourse is difficult to bring to a wider audience.



*Figure 151: The future of fact-checking will most probably involve a combination of technological and human approaches; Source: Pixabay*

Since the process of fact-checking takes time and effort, as it involves the identification of claims, cross-referencing those claims with other data and interviewing experts to establish the veracity of those claims (Smalley 2022), there have been efforts to automatize part of the process. Full Fact, the UK fact-checking organisation, has been using automated methods since 2013. The future of fact-checking will most probably involve a combination of technological and human approaches. Automated processes could identify misinformation patterns using natural language processing and machine learning methods, but the human factor will most probably still play an important role.

Ultimately, the judgement and expertise of a person is needed for understanding and providing the context of a particular claim and to reach out to experts who could establish the underlying facts. Another important aspect regarding the future of fact-checking could be related to collaboration, be it local or international. Fact-checking outlets with distinct levels of expertise could partner with other similar organisations, with media institutions and social media companies to develop more accurate and efficient methodologies that would streamline the whole fact-checking process. It is also important to develop a more diverse pool of fact-checkers, to attract people with expertise in a variety of fields (e.g. economics, public health) and to work in multidisciplinary teams where each member could improve the fact-checking process as a whole.



## Exercise 5 – Quiz

1. What is the purpose of fact-checking?
  - a. To promote a particular political agenda;
  - b. To provide the public with correct information;
  - c. To spread misinformation.
2. What are some of the common challenges and limitations of fact-checking?
  - a. Limited resources and budgets for fact-checking organisations;
  - b. Difficulty reaching an audience that gets its news primarily through social media;
  - c. A lack of bias and inaccurate information on fact-checking websites.
3. What strategies are in place to improve the accuracy and effectiveness of fact-checks?
  - a. Building a broader and more diverse pool of fact-checkers;
  - b. Exclusively using technology to automate fact-checking processes;
  - c. Refusing to collaborate with other organisations or media outlets.

The solution to this exercise can be found at the very end of this module.

### Fact-checking: three steps to the truth.



It is now time for you to finally start fact-checking. In a short instruction video we will take you through the 3 steps in the EUfactcheck methodology and you can start fact-checking claims and statements on Cohesion Policy.

You can use this fact-checking methodology in several ways. Fact-checking can be part of bigger journalism production, in which you include and explain the checked facts. These facts can be part of the production, presented in a separate box or infographic, or explained in an embedded video or podcast. The outcome of your fact-checking can also lead to a fact-check with a clear true-false rating visualised in an icon. This is the format that is used on the [EUfactcheck website](#).

Figure 152: Screenshot of the EUfactcheck manual cover;  
Source: EJTA-EUFactcheck

## Exercise 6:

Question: Can you distinguish the different elements in a fact-check example?

The solution to this exercise can be found at the very end of this module.

### Step by step instruction

The EUfactcheck methodology is visualised in a flowchart with three major steps. The methodology also provides you with three worksheets to help you collect and organise your research and information.

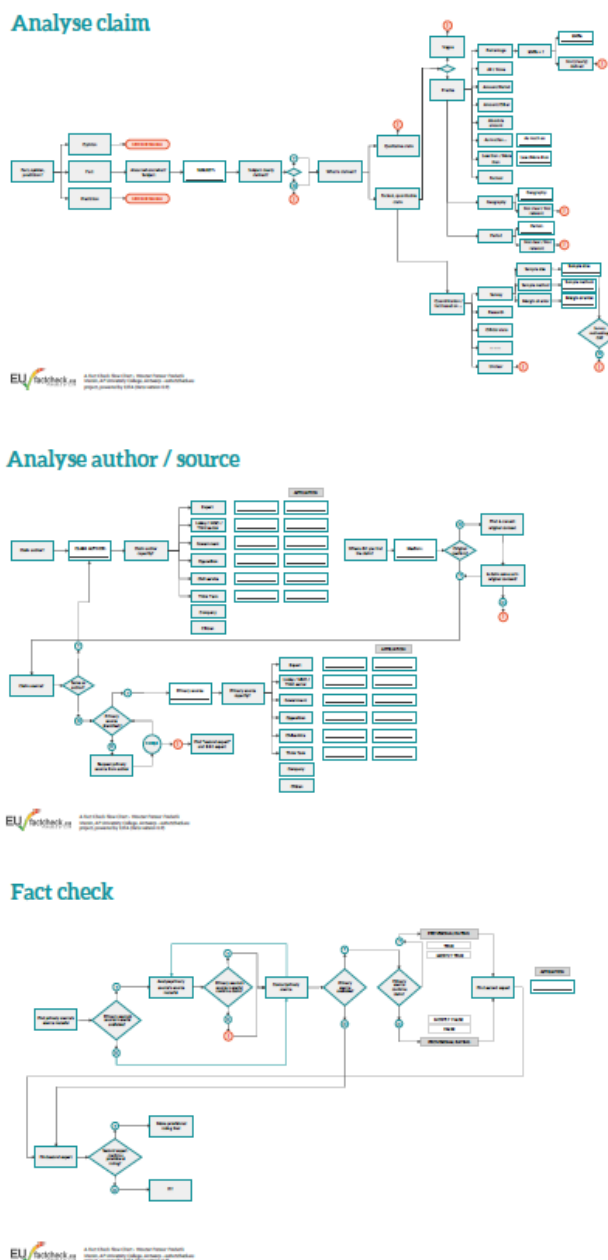


Figure 153: Screenshot of flowchart, available online; Source: EJTA-EUfactcheck

The flowchart is available for download [here](#).

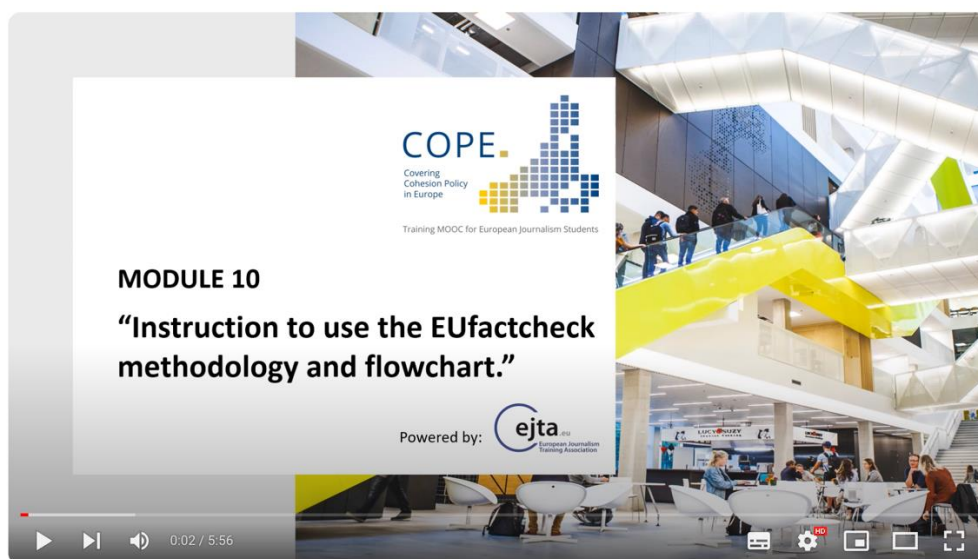
The first step in fact-checking is to decide if it is doable to check the claim, statement or information.

The second step in fact-checking is to analyse your claim, statement or information. You will have to find primary sources to investigate the information and you have to find out how reliable the sender of the information is.

After this initial orientation research you can move to the actual fact-checking by digging deeper to find the truth.

### **Instruction video**

This [instruction video](#) will take you through the three steps of fact-checking.



*Figure 152: Video - Instruction to use the EUfactcheck methodology and flowchart; Source: EJTA-EUfactchek*

The viewing time is less than 10 minutes.

### **Checking the facts**

After watching the instruction video you can [download the flowchart](#) and [the guideline](#) for free on the EUfactcheck website and start fact-checking.

Below is an exercise to get you started.

You can use the worksheet (appendix 3 in the guidelines) to go through the process step-by-step and collect all relevant information. The work sheet can be found in Appendix 1 of Module 10 at the very end of this module.

### **Exercise 7:**

1. Choose one of the fact-checks on EUfactcheck.eu. Only read the headline and introduction of the claim.
2. Carry out the fact-checking yourself using the EUfactcheck flowchart and write your own fact-check article.
3. Compare your fact-check article with the one published on the EUfactcheck website and see if you have found the same sources and reached the same conclusion.

If you need to work on your journalism research skills, please check out [this blog](#) for tips. Some additional skills for data research will be offered in module 11.

### **Key points to take away**

*“There are no facts, only interpretations.” (Frederich Nietzsche)*

*“Facts get their importance from what is made of them in interpretation, for interpretations depend very much on who the interpreter is, who he or she is addressing, what his or her purpose is.” (Edward Said)*

*“Not all false information is fake news.”*

*“There is more to fact-checking than meets the eye.”*

*“Always look for primary sources.”*

*“Social media is the most fertile ground for the spread of fake news.”*

*“A step by step approach to fact-checking helps to get your facts right.”*

*“Media literacy is an essential competence to function in a digital information society.”*

*“Once you start fact-checking it can become addictive.”*

### **Conclusion**

Now that you have completed this module ask yourself if you can indeed ‘get the facts right on Cohesion Policy’?

To check if you really do, go back to the learning outcomes.

? Can you identify and distinguish the difference between misinformation, disinformation, and malinformation, and do you now have different perspectives on false information?

? Do you understand the premises of information verification, as well as the main techniques that journalists can use when fact-checking (presumed) false information?

? Are you able to distinguish between main and side issues in information and assess relevance of information and sources, to analyse claims about Cohesion Policy?

? Do you understand and can you apply a set of clear steps in the information verification process?

See Appendix 2 of Module 10 for the full **Fact check flow chart Work sheet**.

## Solutions for Module 10:

### Exercise 1:

1.

- a. The fact that an institution is public is not a guarantee that all the information coming from it is correct. Verification is required.
- b. Calling specialists would take a lot of time, and you do not have the guarantee that they are unbiased and well-informed enough.
- c. The EU Regional and Urban Development section on the European Commission website is your go-to in this situation because there you can find the official information.

2.

- a. The instinct to verify the information is the correct one. The suggestion that an institution like the European Commission would easily fund businesses that affect the environment is a red flag.
- b. Even prestigious media institutions can make mistakes.
- c. What private companies do definitely concerns the public, especially when public funds are involved.

3.

- a. The information does not necessarily need to be made-up to be problematic
- b. This is the right way of doing things: being alert and having a clear perspective.
- c. Although it is always preferred to go to the primary source, it is not forbidden to consider Government information, even about the EU.

4.

- a. The fact that an institution is public is not a guarantee that all the information coming from it is correct. Verification is required.
- b. Calling specialists would take a lot of time, and you do not have the guarantee that they are unbiased and well-informed enough.
- c. The EU Regional and Urban Development section on the European Commission website is your go-to in this situation because there you can find the official information.

5.

- a. The instinct to verify the information is the correct one. The suggestion that an institution like the European Commission would easily fund businesses that affect the environment is a red flag.
  - b. Even prestigious media institutions can make mistakes.
  - c. What private companies do definitely concerns the public, especially when public funds are involved.
- 6.
- a. The information does not necessarily need to be made-up to be problematic
  - b. This is the right way of doing things: being alert and having a clear perspective.
  - c. Although it is always preferred to go to the primary source, it is not forbidden to consider Government information, even about the EU.

**Exercise 2:**

Source: <a href="#">Information Disorder: the essential glossary</a>
<b>Misinformation</b> is information that is false, but not intended to cause harm. For example, individuals who don't know a piece of information is false may spread it on social media in an attempt to be helpful.
<b>Disinformation</b> is false information that is deliberately created or disseminated with the express purpose to cause harm. Producers of disinformation typically have political, financial, psychological, or social motivations.
<b>Malinformation</b> is genuine information that is shared to cause harm. This includes private or revealing information that is spread to harm a person or reputation.

**Exercise 3:**

**Facebook** is the most used social network for news consumption across all five continents, including Europe. Another popular platform in Europe is **YouTube**, 23% of the respondents using it for news. Similar to other continents, the least favourite social network across Europe is **Telegram** and so is TikTok. WhatsApp has a significant score in **Africa**, and so does Instagram, which does well in Latin America.

**Exercise 4:**

1-d, 2-f, 3-b, 4-a, 5-e, 6-c

**Exercise 5:**

Correct answers: 1-b, 2-a, 3-a

1.



- a. Promoting a political agenda is not a part of proper conduct.
- b. The purpose of fact-checking is to inform the audience correctly.**
- c. Misinformation is not a part of proper conduct.

2.

- a. Fact-checking can be time-consuming, requiring significant resources and efforts to ensure accurate and reliable results.**
- b. Although the truth may not reach as many people as false information, reaching people on social media is not the main challenge for fact-checking.
- c. The lack of bias is desirable.

3.

- a. Considering the amount of false information that needs to be verified, having more fact-checkers could help keeping up.**
- b. Sometimes, fact-checking requires human understanding, interpretation and analysis.
- c. By working together, organisations can pool their resources, expertise, and knowledge to conduct more comprehensive investigations and reach broader audiences.

#### **Exercise 6:**

- Head/Title with the rating
- Lead: Introduction of the claim with reference to the sources
- Middle part: Explaining the sources used to investigate the various elements of the claim. Assessing the evidence from the sources
- Conclusion and rating.

Note that the structure is comparable to a regular journalistic item.

# Fact check flow chart – Worksheet V0.9

## 1 Analyse claim

		Warning lights
1.1 Fact, opinion or prediction?		
Opinion	GO TO RATING: Uncheckable	
Prediction	GO TO RATING: Uncheckable	
(If ... then) Prediction	Go to 1.2	
Fact	Go to 1.2	
1.2 About whom / what? SUBJECT	<b>SUBJECT:</b>  .....	
1.2.1 Is subject clearly defined?		
YES	Go to 1.3	
NO	Turn on warning light and go to 1.3	<input type="checkbox"/>
1.3 What is claimed?		
Qualitative claim?	Turn on warning light and go to 2. Analyse author / source	<input type="checkbox"/>
Factual, quantitative claim?		
Vague?	Turn on warning light and go to: 2. Analyse author / source	<input type="checkbox"/>
Precise factual?	<input type="checkbox"/>	
Precise quantitative?	<input type="checkbox"/>	
	<b>Indicate quantifier:</b>	
	Percentage <input type="checkbox"/>	
	What is 100%? 100% = .....	
	Not clearly defined: turn on warning light	<input type="checkbox"/>
	All / None <input type="checkbox"/>	
	Amount / Period <input type="checkbox"/>	
	Amount / Other <input type="checkbox"/>	
	Absolute amount <input type="checkbox"/>	
	As much as <input type="checkbox"/>	
	As much as: .....	
	Less than / More than <input type="checkbox"/>	
	Less than / More than: .....	
What <b>geography</b> is covered by the claim?	<b>Geography:</b>  .....	

Geography not clear	Turn on warning light	<input type="checkbox"/>
Geography not relevant	<input type="checkbox"/>	
What <b>period</b> is covered by the claim?	<b>Period:</b> .....	
Period not clear	Turn on warning light	<input type="checkbox"/>
Period not relevant	<input type="checkbox"/>	
Quantification / fact based on ...	<b>Indicate (more than one possible):</b>	
	Survey	<input type="checkbox"/>
	Sample size	.....
	Sample method	.....
	Margin of error	.....
	Survey methodology not OK	Turn on warning light <input type="checkbox"/>
	Research	<input type="checkbox"/>
	Official stats	<input type="checkbox"/>
	Other:	<input type="checkbox"/> .....
	Unclear	Turn on warning light <input type="checkbox"/>

## 2 Analyse author / source

2.1 Who is the claim's author?	<b>Claim author:</b> .....	
2.1.1 What is the claim author's capacity?	<b>Indicate capacity:</b>	
	Expert <input type="checkbox"/>	
	Lobby / NGO / Third Sector <input type="checkbox"/>	
	Government <input type="checkbox"/>	
	Think Tank <input type="checkbox"/>	
	Company <input type="checkbox"/>	
	Citizen <input type="checkbox"/>	
2.1.2 What is the claim author's affiliation?	<b>Affiliation:</b> .....	
2.2 Who / what is the claim's primary source?		
Same as author	<input type="checkbox"/>	
Is the primary source identified?	Yes <input type="checkbox"/> Go to 2.2.2 No <input type="checkbox"/> Go to 2.2.1	
2.2.1 Request primary source from author (3 attempts)	If no primary source identified after 3 attempts, turn on warning light	<input type="checkbox"/>
2.2.2 Primary source	<b>Primary source:</b> .....	
2.2.2.1 <i>What is the primary source's capacity?</i>	<b>Indicate capacity:</b>	
	Expert <input type="checkbox"/>	
	Lobby / NGO / Third Sector <input type="checkbox"/>	
	Government <input type="checkbox"/>	
	Think Tank <input type="checkbox"/>	
	Company <input type="checkbox"/>	
	Citizen <input type="checkbox"/>	
2.2.2.2 <i>What is the primary source's affiliation?</i>	<b>Affiliation:</b> .....	

### 3 Fact check

3.1 Find primary source's source material		
Is primary source's source material available?	No	Contact primary source, request primary source's source material and go to 3.2
	Yes	Go to 3.2
3.2 Analyse primary source's source material		
Does primary source's source material confirm claim?	Yes	Go to 3.3
	No	Turn on warning light and go to 3.3 <input type="checkbox"/>
3.3 Contact primary source		
Is primary source available?	No	Go to 3.4
	Yes	Go to 3.3.1
3.3.1 Does primary source confirm claim?	Yes	PROVISIONAL RATING TRUE <input type="checkbox"/>
		PROVISIONAL RATING MOSTLY TRUE <input type="checkbox"/>
	No	PROVISIONAL RATING FALSE <input type="checkbox"/>
		PROVISIONAL RATING MOSTLY FALSE <input type="checkbox"/>
3.4 Find & contact second expert		
3.4.1 Does second expert confirm provisional rating?	Yes	MAKE PROVISIONAL RATING FINAL
	No	UNCHECKABLE  <b>OR???</b>  Contact third expert

## 4 Final rating

TRUE

MOSTLY TRUE

MOSTLY FALSE

FALSE

## 5 Summary of warning lights and shaky claim rating

Phase	Warning lights	Implication of warning light	Action
Analyse claim	Subject not clearly defined	Shaky claim	Check with primary source
	Qualitative claim	Depends on primary source's and second expert's judgment	
	Factual, quantitative claim, but vague	Shaky claim	Check with primary source
	Percentage: 100% not (clearly) defined	Shaky claim	Check with primary source
	Geography not clear / not relevant	Shaky claim	Check with primary source
	Period not clear / not relevant	Shaky claim	Check with primary source
	Quantification / fact based on ...: not clear	Shaky claim	Check with primary source
	Survey methodology	Shaky claim	Check with primary source
Analyse source	Primary source not identified	Shaky claim OR Uncheckable	
Fact check	Primary source's source material does NOT confirm claim	Shaky claim	Check with primary source

Shaky claim rating: ..... / 10

## Fact check flow chart – Work sheet

### 1 Analyse claim

1.		Warning lights
1.1 Fact, opinion or prediction?		
Opinion	GO TO RATING: Uncheckable	
Prediction	GO TO RATING: Uncheckable	
(If ... then) Prediction	Go to 1.2	
Fact	Go to 1.2	
1.2 About whom / what? SUBJECT	<b>SUBJECT:</b> ..... .....	
1.2.1 Is subject clearly defined?		
YES	Go to 1.3	
NO	Turn on warning light and go to 1.3	<input type="checkbox"/>
1.3 What is claimed?		
Qualitative claim?	Turn on warning light and go to 2. Analyse author / source	<input type="checkbox"/>
Factual, quantitative claim?		
Vague?	Turn on warning light and go to: 2. Analyse author / source	<input type="checkbox"/>
Precise factual?	<input type="checkbox"/>	
Precise quantitative?	<input type="checkbox"/>	
	<b>Indicate quantifier:</b>	
	Percentage	<input type="checkbox"/>
	What is 100%?	100% = ..... .....
		Not clearly defined: turn on warning light
	All / None	<input type="checkbox"/>
	Amount / Period	<input type="checkbox"/>
	Amount / Other	<input type="checkbox"/>
	Absolute amount	<input type="checkbox"/>
	As much as	<input type="checkbox"/>
	As much as:	..... .....
	Less than / More than	<input type="checkbox"/>
	Less than / More than:	



		..... .....	
What <b>geography</b> is covered by the claim?	<b>Geography:</b> ..... .....		
Geography not clear	Turn on warning light		<input type="checkbox"/>
Geography not relevant	<input type="checkbox"/>		
What <b>period</b> is covered by the claim?	<b>Period:</b> ..... .....		
Period not clear	Turn on warning light		<input type="checkbox"/>
Period not relevant	<input type="checkbox"/>		
Quantification / fact based on ...	<b>Indicate (more than one possible):</b>		
	Survey	<input type="checkbox"/>	
	Sample size	..... .....	
	Sample method	..... .....	
	Margin of error	..... .....	
	Survey methodology not OK	Turn on warning light	<input type="checkbox"/>
	Research	<input type="checkbox"/>	
	Official stats	<input type="checkbox"/>	
	Other:	<input type="checkbox"/>	
		..... .....	
	Unclear	Turn on warning light	<input type="checkbox"/>

## 2 Analyse author / source

2.1 Who is the claim's author?	<b>Claim author:</b> ..... .....		
2.1.1 What is the claim author's capacity?	<b>Indicate capacity:</b>		
	Expert	<input type="checkbox"/>	
	Lobby / NGO / Third Sector	<input type="checkbox"/>	
	Government	<input type="checkbox"/>	
	Opposition	<input type="checkbox"/>	
	Think Tank	<input type="checkbox"/>	
	Company	<input type="checkbox"/>	
	Citizen	<input type="checkbox"/>	
2.1.2 What is the claim author's affiliation?	<b>Affiliation:</b> ..... .....		
2.2 In which medium did you find the claim?	<b>Medium:</b> ..... .....		
Is that the original medium?	Yes	Go to 2.3	
	No	Find and consult original context	
Is claim same as in original context?	Yes	Go to 2.3	<input type="checkbox"/>
	No	Turn on warning light	
2.3 Who / what is the claim's primary source?			
Same as author	<input type="checkbox"/>		
Is the primary source identified?	Yes	Go to 2.2.2	
	No	Go to 2.2.1	
2.3.1 Request primary source from author (3 attempts)	If no primary source identified after 3 attempts, turn on warning light		<input type="checkbox"/>
2.3.2 Primary source	<b>Primary source:</b> ..... .....		
2.3.2.1 What is the primary source's capacity?	<b>Indicate capacity:</b>		
	Expert	<input type="checkbox"/>	
	Lobby / NGO / 3 <sup>rd</sup> Sector	<input type="checkbox"/>	
	Government	<input type="checkbox"/>	
	Opposition	<input type="checkbox"/>	
	Think Tank	<input type="checkbox"/>	
	Company	<input type="checkbox"/>	
	Citizen	<input type="checkbox"/>	

2.3.2.2 <i>What is the primary source's affiliation?</i>	<b>Affiliation:</b> ..... .....	
--	---------------------------------------	--

### 3 Fact check

3.1 Find primary source's source material		
Is primary source's source material available?	No	Contact primary source, request primary source's source material and go to 3.2
	Yes	Go to 3.2
3.2 Analyse primary source's source material		
Does primary source's source material confirm claim?	Yes	Go to 3.3
	No	Turn on warning light and go to 3.3 <input type="checkbox"/>
3.3 Contact primary source		
Is primary source available?	No	Go to 3.4
	Yes	Go to 3.3.1
3.3.1 Does primary source confirm claim?	Yes	PROVISIONAL RATING TRUE <input type="checkbox"/>
		PROVISIONAL RATING MOSTLY TRUE <input type="checkbox"/>
	No	PROVISIONAL RATING FALSE <input type="checkbox"/>
		PROVISIONAL RATING MOSTLY FALSE <input type="checkbox"/>
3.4 Find & contact second expert		
3.4.1 Does second expert confirm provisional rating?	Yes	MAKE PROVISIONAL RATING FINAL
	No	UNCHECKABLE  OR???  Contact third expert

## 4 Final rating



## 5 Summary of warning lights and shaky claim rating

Phase	Warning lights	Implication of warning light	Action
Analyse claim	Subject not clearly defined	Shaky claim	Check with primary source
	Qualitative claim	Depends on primary source's and second expert's judgment	
	Factual, quantitative claim, but vague	Shaky claim	Check with primary source
	Percentage: 100% not (clearly) defined	Shaky claim	Check with primary source
	Geography not clear / not relevant	Shaky claim	Check with primary source
	Period not clear / not relevant	Shaky claim	Check with primary source
	Quantification / fact based on ...: not clear	Shaky claim	Check with primary source
	Survey methodology	Shaky claim	Check with primary source
	Analyse source	Primary source not identified	Shaky claim OR Uncheckable
Claim in original context is different		Shaky claim	Check with claim author
Fact check	Primary source's source material does NOT confirm claim	Shaky claim	Check with primary source

Shaky claim rating: ..... / 11

# Module 11 – Up-to-date Developments in Journalistic Research Methods

## Basic information

Module number	11
Module title	<b>Up-to-date developments in journalistic research methods</b>
Duration/study load	8 hours
Keywords	legal base, reporting documents, accounting documents, data biography, tender
Learning outcomes	<p>At the end of the module, you will acquire the following skills (related to the Journalism competencies in the Tartu Declaration (ETJA 2021):</p> <ol style="list-style-type: none"> <li>1. Gather information about EU Cohesion policy swiftly (Tartu 4) <ul style="list-style-type: none"> <li>• Understanding where to find data on EU Cohesion Policy spending using Kohesio and other EU sources.</li> <li>• Obtaining EU audits and other kinds of reports on EU Cohesion spending that can be used in reporting</li> </ul> </li> <li>2. Select the essential information about EU Cohesion policy (Tartu 5) <ul style="list-style-type: none"> <li>• Finding useful information in reporting documents and accounting documents.</li> <li>• Making FOI requests using existing software like AskTheEU.org</li> <li>• Completing data biographies to analyse the reliability of data sources</li> </ul> </li> <li>3. Presenting information about in an effective journalistic form (Tartu 6) <ul style="list-style-type: none"> <li>• Visualising data on EU Cohesion Policy appropriately</li> </ul> </li> </ol>

Description	<p><b>What is it about?</b> Module 11 will present the most up-to-date developments in journalistic research and visualisation methods.</p> <p><b>What are you going to learn?</b> You will learn data gathering at the European, national, regional and local level depending on the research task. You will also be introduced to data presentation, data sharing via data libraries, crowd sourcing in local communities and by-topic cross-border collaboration.</p> <p><b>How are you going to learn?</b> By diving deep into the research, community interaction and presentation methods with a hands-on approach, you will learn how interconnected local communities are when it comes to EU policies.</p>
Sequentiality	<p>For the data gathering, it is crucial to understand the administrative and economic structure of Cohesion Funds, as described in modules 2, 3, 5, 8 and 9. Further, this module is linked with module 12, where we introduce the concept of collaborative reporting</p>
Contact to the author	<p><b>Developers:</b> Hazel Sheffield, Brigitte Alfter, Adriana Homolová</p> <p><b>Consortium partner:</b> Arena for Journalism in Europe  <a href="mailto:hazel@journalismarena.eu">hazel@journalismarena.eu</a>,  <a href="mailto:brigitte@journalismarena.eu">brigitte@journalismarena.eu</a>,  <a href="mailto:adriana@journalismarena.eu">adriana@journalismarena.eu</a></p> <p><b>Co-author:</b> András Pethö, Direkt36  <a href="mailto:andras.petho@gmail.com">andras.petho@gmail.com</a></p>



## Glossary

accounting documents	Payslips, employment contracts, proof of payment and other documents used to calculate costs within a project.
Bootcamp	In journalism, a bootcamp is a specialised, intensive meeting of reporters, data scientists and other parties to analyse large amounts of data or information together.
Citizen journalists	The gathering, writing, editing, production and distribution of news and information by people not trained as professional journalists. Source: IGI Global
Collaborative reporting	Where two journalists or newsrooms work together, rather than in competition. See module 12 for more on this.
Community of interest	A community of interest, or interest-based community, is a community of people who share a common interest or passion. These people exchange ideas and thoughts about the given passion, but may know little about each other outside this area. In the included example, ABC wanted to appeal to people with experience of the care sector. Source: Wikipedia
Competitive negotiated procedure	One of the ways public contracts are awarded in the EU. In competitive negotiated procedures anyone may ask to participate, but only those who are pre-selected will be invited to submit initial tenders and to negotiate the terms of the contract. In some cases, negotiations may be necessary, especially when tendering contracts around defence and security, water, energy, transport and postal services. Source: Europa.eu
Crowdsourcing	Journalism crowdsourcing is the act of specifically inviting a group of people to participate in a reporting task—such as newsgathering, data collection, or analysis—through a targeted, open call for input; personal experiences; documents; or other contributions. Source: Tow Center
data biography	A process used to interrogate data as you would a human source.
FOI	Freedom of Information request. In the spirit of transparency, EU residents have the right to access and obtain documents directly online, through registers and databases or by individual requests. Source: EU Commission
legal base	This refers to the part of one of the EU's treaties (usually the Treaty on the Functioning of the European Union) that gives the EU the legal right to act.

MOOC	Massive Open Online Course
OLAF	The European anti-fraud office investigates fraud against the EU budget, corruption and serious misconduct within the European institutions, and develops anti-fraud policy for the European Commission.
Open procedure	One of the ways public contracts are awarded in the EU. In an open procedure anyone may submit a full tender. This procedure is used the most frequently. Source: Europa.eu
reporting documents	Documents that beneficiaries of EU funds are required to publish for transparency. NGOs can also create “shadow reports” to supplement or “shadow” state reports, presenting the opinions of civil society on government action.
Restricted procedure	One of the ways public contracts are awarded in the EU. Anyone may ask to participate in a restricted procedure, but only those who are pre-selected may submit tenders. Source: Europa.eu
tender	In the EU, public contracts are awarded through a competitive tender process.

## About this module



Figure 155: The newsroom; Source: Unsplash

Taking inspiration from real stories, module 11 will plunge you into the search for data to back up the hypothesis for your investigation.

Together we will learn where information on EU Cohesion Policy funding is found at European, national and local levels, and the obstacles that can prevent access to this crucial information.

We'll learn how to file freedom of information requests (FOI) and what to do when they are delayed or refused. Once we have some data, we'll figure out how to interrogate it using data biographies to find out about the story the numbers are telling us and whether it can be trusted.

Finally we'll take a close look at data visualisation including why and how to visualise your data and what it can bring to an investigation.

Investigations are nothing without data. But getting hold of the information you need isn't always easy. In this module we'll use real life examples and trace the story of a true investigation to show how the best journalists in the field go about their research.

This module will not only give you the skills and the knowledge you need to do this work – you'll end it with a plan that puts you at the heart of your own investigation.

## Introduction to the story of this module

The story you will follow in this module is based on a real investigation by the Hungarian investigative newsroom [Direkt36](#). Direkt36 is an online media outlet, which was founded in 2015 to investigate political corruption in Hungary. It distributes stories through established outlets including 444, RTL and The Washington Post. Since its inception it has published many shocking and essential stories about the political situation in Hungary.



Figure 156: Hungarian newsroom Direkt36 uncovered documents showing Viktor Órban's father was involved in the construction of a controversial road with EU funds; Source: Direkt36

In 2015, Direkt36 published a big investigation on the building of the M4 motorway, the biggest single Hungarian infrastructure project between 2007 and 2013, which cost €1.4 billion, including €729 million from the EU Cohesion Fund.

Not all of the elements of this module were part of the Direkt36 investigation. But we use this storyline as an example of a successful investigation and to explore various research techniques.

Imagine you are starting your first day working for an investigative newsroom. The editor announces a [huge investigation](#) into state contracts won by companies with ties to the Hungarian prime minister

Viktor Orbán. Mr Orbán has made no secret of his disdain for the EU and the West, even comparing Brussels to Moscow in the depths of communism. Yet it has for some time been suspected that people with business ties to Mr Orbán have been benefiting from Hungary's EU membership. Since Orbán came to power in 2010, these companies have received cash for contracts to carry out projects funded partly or wholly by the EU, from the EU Cohesion Policy funds that are made up of contributions from Western countries.

For a long time, it has been assumed by reporters and citizens alike that some of the most profitable businesses associated with friends of the prime minister have been winning lucrative procurement tenders. Especially since most of the biggest state projects in Hungary are funded in part by the EU. But no one has ever been able to prove it, because the data is hidden in many different government databases.

Your new editor wants to change that. They set the newsroom two tasks: find the data and, in that data, find the contracts that prove EU Cohesion Project funding is being paid to Orbán's associates.

### **First things first**

First you set out to find out whether there is a central database for EU Cohesion Policy funding tender documents. A colleague tells you about a journalist for the Financial Times (FT) called Cynthia O'Murchu, who tried to track down data on all the beneficiaries of EU Funding (when the UK was still a member of the EU). You find a [video](#) in which Cynthia explains how they did their investigation.

You put into your notebook three important investigative points from the video.

#### **Exercise 1:**

Answer the following questions in your notebook:

1. What is innovative about the way the journalists conducted this investigation?
2. What is notable about the way that data about EU Cohesion Policy tender is held? (e.g. Is it held at local or national or EU-level?)
3. What did the investigation reveal about how much the EU knew about where the funding ended up?

Do not spend more than 15 minutes on this exercise. The solution to this exercise can be found at the very end of this module.

You tell your colleague what you have learned about researching EU Cohesion Policy funding from the video about the 2010 investigation.

They explain that since the FT investigated EU Cohesion Policy spending, the UK has left the EU, and the EU has created its own platform to show how and where EU Cohesion Policy funding is spent.

“You won’t have problems finding tender data any more,” your colleague says. “Last year the EU launched Kohesio, a platform offering easy and transparent access to up-to-date information on projects co-funded by the EU Cohesion Policy and on their beneficiaries.”

Together you open the website and begin to look for information that can help your investigation.

### What is Kohesio?

Your colleague has just explained to you that the EU has a special platform to allow interested parties to search for information relating to EU Cohesion Policy spending called Kohesio. You may be familiar with Kohesio from your work in previous modules of this MOOC.



Figure 157: What is Kohesio?;  
Source: EU Commission

### Exercise 2:

Now you want to find out more about this platform. You find the official EU page and print it out. But when you go to get the sheet from the printer you see that the ink has smudged and some words are not visible. You return to the [link](#) and fill in the blanks. The exercise should take no more than 20 minutes. The solution to this exercise can be found at the very end of this module.

*The EU set up Kohesio to improve \_\_\_\_\_ and increase \_\_\_\_\_ of the investments carried out through cohesion funds. Kohesio contains data on more than 1.7 million \_\_\_\_\_ and approximately 500 000 \_\_\_\_\_ financed throughout the funding period 2014-2020.*

*The main source of data for Kohesio are the detailed \_\_\_\_\_ with information on the financed projects. These lists are regularly published by the \_\_\_\_\_ and the Cohesion Funds’ managing authorities. The challenge is that they are published on various national websites and data is not formally \_\_\_\_\_.*

*To overcome this issue, Kohesio’s project team developed \_\_\_\_\_ to streamline and centralise data collection for Kohesio across national websites. When a new list of operations is published by the managing authorities, it is acquired by the project team and processed according to a predefined set of rules. This allows the \_\_\_\_\_ about projects co-financed by the EU to be stored and standardised. Project \_\_\_\_\_ are then machine-translated into all EU languages and location information is used to determine the latitude and longitude of the projects. Finally, \_\_\_\_\_ are made available in Kohesio.*

From your Googling, you also learn that there are two other notable sources of data:

- The EU [Cohesion Policy Open Data Platform](#), which provides information on the investments made and the results obtained based on reports provided to the Commission by member states.
- A 2021 report on the [largest 50 beneficiaries in each EU member state of Common Agricultural Policy \(CAP\) and Cohesion Policy funds](#).

When you discuss this with your colleague during a coffee break, they tell you there are still two major hurdles that make it difficult to get a complete overview of where EU Cohesion Policy funding goes:

1. The absence of a single database with beneficiaries of all EU funds.
2. The reporting systems currently only cover direct beneficiaries (the legal or natural person receiving the payment), which are not necessarily the end or ultimate beneficiaries (the ones who benefit from the money). For example, if a natural person, company, or public administration owns various companies that receive funds across countries, the companies receiving the funds appear in the reporting systems of the respective countries.

Nonetheless, the two of you decide it is a good place to start.

## Using Kohesio

Kohesio gives a comprehensive overview of cohesion policy investments by geographical coverage and by themes.

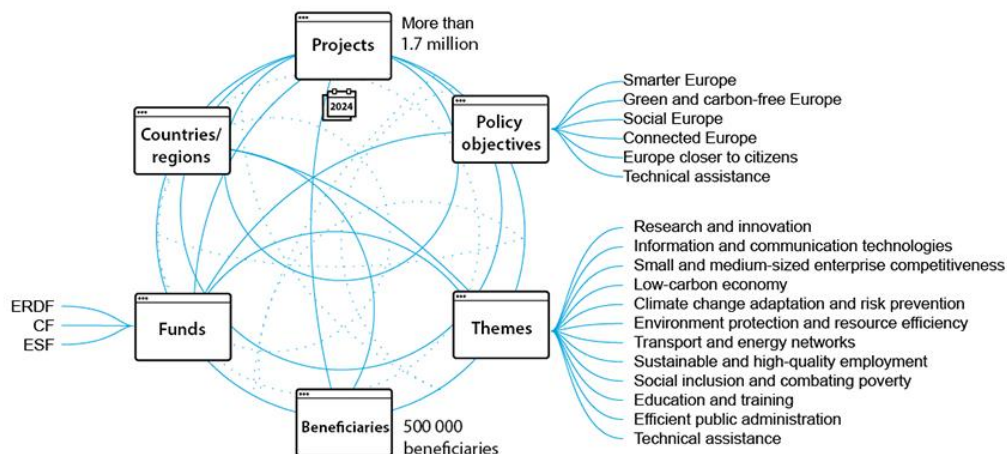


Figure 158: What is Kohesio?; Source: European Union

Your colleague at your investigative newsroom has just told you about an EU database of information relating to the beneficiaries of EU Cohesion Policy funding called [Kohesio](#).

### Exercise 3:

You decide to find out more about Hungarian infrastructure projects using Kohesio. One of the projects the editor wants to investigate is the construction of the M4.

You want to see if the original contract for the M4 is in the Kohesio database. In the Keywords box, enter M4. In the country dropdown menu, select Hungary. You will see several results.

Order the results by **total budget (descending)** so that the project with the largest budget is displayed at the top. Select this project and fill in the blanks using the information you can see. Write some notes about the project with the largest budget: “M4 implementation of the section between Berettyóújfalu-Nagykereki (national border)”

You are just about to go and show your colleague, when you knock over a cup of coffee, leaving marks all over your paper. You have just 15 minutes to fill in the following blanks.

*Starting in \_\_\_\_\_ the \_\_\_\_\_ contributed \_\_\_\_\_ to establish a link between the North Great Plain region and the capital city. The listed beneficiary is \_\_\_\_\_ a development corporation 100% owned by the Hungarian state. This company has received \_\_\_\_\_ in European Regional Development funds since 2009 for at least \_\_\_\_\_ projects.*

[Check your answer here](#) or in the solutions at the very end of this module.

Unfortunately, you realise that this section of the M4 does not relate to the construction in the period you are looking for, 2007-13. You are going to have to keep looking for sources.

### Quiz: Whose decision is it anyway?

In the afternoon editorial meeting at the investigative newsroom where you have just started as a junior reporter, a debate breaks out between an editor and some of the reporters. The latter are claiming that Western European nations including Germany and France have been making decisions about who gets EU Cohesion Policy funding. An editor says this is impossible, because the EU decides where the money goes.

### Exercise 4:

The editor-in-chief asks for quiet and says they know all about EU Cohesion Policy and can explain. You also know some things about the way the EU works from Module 2 of this MOOC, so you think you will be able to put these in the context of an investigation. But you listen carefully as people start to ask the editor questions. Take 20 minutes to guess his correct answers based on [Melchior \(2017\)](#) from the options below. The solution to this exercise can be found at the very end of this module.

Is it possible for “the EU” to have decided something?

1. Rarely as countries usually have the right to veto



2. Yes, countries are usually required to follow EU directives
3. No, each country has to make its individual decisions

Who speaks on behalf of the EU and can explain decisions made at EU level?

1. The EU has its own communication team.
2. Each country has a press person dedicated to explaining decisions.
3. Nobody speaks on behalf of the EU

How do people inside the EU institutions understand EU decision making levels?

1. The EU president, the heads of member states, EU citizens
2. The commission, the parliament, the member states
3. The EU president, the council, member states

Which 2009 treaty transferred a sizeable chunk of political power from national governments and parliaments to EU level?

1. The Lisbon Treaty
2. The Rhodes Treaty
3. The London Treaty

To keep track of EU reporting, journalists should keep an eye on the following institutions (check all that apply)

1. The European Commission
2. The European Parliament
3. The Council of Ministers
4. Your national government through its representation in Brussels

Now match each of the EU entities above with the reason you should contact them on an issue:

- a) ... to understand any of the national interests concerning an issue
- b) ... when you need to understand the idea behind some EU initiative and get background information that puts it into perspective
- c) ... if you want to know what politicians on the left, right and centre think about it

When should you say a decision has been made by “the EU” in your reporting? (Select all that apply)

1. When a European Parliament Committee, a consultative body or an individual MEP has made a decision
2. When the European Commission executes EU policies
3. When all countries, at the end of the legislative process, sign off on a deal

## Links to useful EU sources

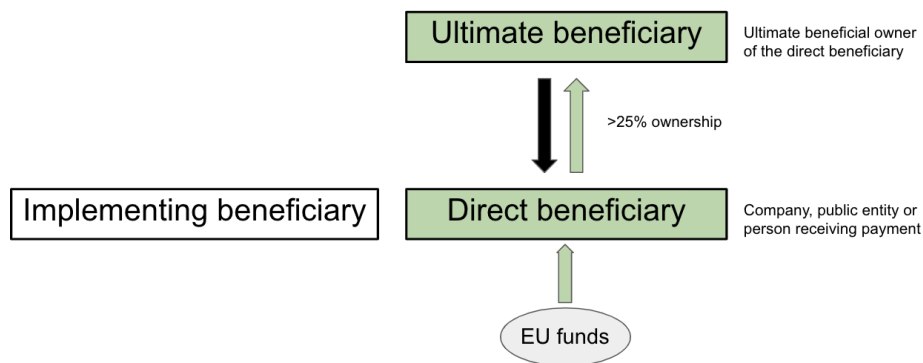


Figure 159: Who really gets paid? Direct versus ultimate beneficiaries; Source: Own creation

At the end of the meeting, the editor says they will send round a list of links that might be helpful for reporters looking into EU Cohesion Policy funding.

Not long after, the following links appear in an email in your inbox. You save them and move on for now.

### Useful links

- [EU's managing authorities](#), to find contacts who manage spending, select projects and monitor implementation in your country
- [EU's online newsroom](#)
- [EU TV channel Europe by Satellite, EbS](#)
- [Home page for EU institutions](#)
- [The European Commission's representation offices in each EU country](#)
- [The European Parliament's information offices in each EU country](#)
- For more information on each country see [this overview of subsidy disclosure practices in each EU member state](#)

More information on the structure and organisation of the EU is also available in Module 6.

### Checks and balances

After the editorial meeting, you go for lunch with a colleague. Now you know that member states have managing authorities that select projects for EU Cohesion Policy funding and manage their implementation. For more information on EU Cohesion Policy and how member states manage applications and funding, see Modules 5, 8 and 9 of this MOOC.

In our story, you still aren't sure what grounds the EU has to check up on EU Cohesion Policy spending. You agree with your colleague that you need to investigate this to figure out why and when the EU might have initially suspected and subsequently investigated corruption in Hungary.

With some more research, you learn about the term legal basis. This refers to the part of one of the EU's treaties (usually the [Treaty on the Functioning of the European Union](#)) that gives the EU the legal right to act. If there is no legal basis in any of the treaties for EU action on a pertinent issue, then the EU cannot enact legislation on that issue ([source](#)).

### **Exercise 5:**

To find out how the EU intervenes, you need to know the legal basis for an audit of EU Cohesion Funding.

- Read Article 148 of the EU Cohesion Policy funding legislation via the [link](#)
- Take 15 minutes to answer the following questions about the audit process by matching the correct answers at the bottom of this exercise-box to the questions.
- The solution to this exercise can be found at the very end of this module.

1. How often will the EU Cohesion Policy Fund projects—with total expenditures up to €200,000—be audited?
2. When will that audit take place?
3. How often are projects with larger budgets audited?
4. Who conducts the audit?
5. When are projects not audited?

Solutions:

a) If there has already been an audit in that year by the European Court of Auditors b) Not more than once per accounting year c) Not more than once d) The audit authority or the European Commission e) Prior to the submission of the accounts for the accounting year in which the operation is completed

You are beginning to get a sense of how a project the size of the M4 might come under the scrutiny of the EU audit.

Now you have a new possible source: the European Court of Auditors.

## Getting to know your data

So far you have learned how to search the EU Cohesion Policy funding database Kohesio, the types of responsible bodies in the EU and when the EU auditing authority has the right to investigate suspected wrongdoing. To find out whether the European Court of Auditors has any information that could help your investigation into EU Cohesion Policy spending on the M4 motorway in Hungary, you search their database. You find that auditors have produced a [report](#) on whether EU Cohesion Policy Funds on roads have been well-spent. But you're suddenly not sure how useful this report is. You decide to take this report to one of the data journalists in the newsroom.

They tell you:

“Just like human sources, data sources should be interrogated before you make any conclusions. This is called creating a data biography.

“It's like a background check, but for data. You can start by asking some simple questions.”

You want to find out why it costs more to build roads in some countries compared to others. On page 19 of the report, Figure 4 provides a breakdown of the total cost of 1 km of audited road projects per counted traffic for several projects in Poland, Spain, Germany and Greece.

### Exercise 6:

To create a data biography of this information, take five minutes to answer the following questions.

1. Where did the data come from?
2. Who collected it?
3. How was it collected?
4. Why was it collected?

The solution to this exercise can be found at the very end of this module.

Your colleague explains that the last question is the most important. “In this case we know the EU Court of Auditors wanted to check spending in different countries. But some sources of data are produced by non-governmental sources to serve a point of view. In this way data is subjective, just like spoken and written opinions. For more complicated data, it's useful to write the data biography into a chart – I'll send one to you in an email.”

Afterwards, you receive the following chart on email and save it to your computer for future use. Before you can fill it in, you need to find some data.

Dataset Name	Link to data source	Link to storage source	Who collected the data	Who owns the data E1	How was the data collected	Sample Size	Who was included/excluded from sample	When was the data collected	When was the data last updated	Why was the data collected	Notes on data quality	Notes on data usage conditions

Figure 160: Your data biography

## Who got paid?

The next day, you have a breakthrough in your investigation into EU Cohesion Policy Funding on the M4 motorway in Hungary. A colleague tells you they have received some important documents relating to the construction of the M4 road. They promise to tell you how they got their hands on the document later – but first they need your help.

The documents appear to show that some [people close to the government](#) benefited from the construction of the M4.

The colleague explains that the documents they received are called accounting documents, and that they include:

- Payslips
- Employment contracts
- Proof of payment
- Documents setting the percentage of time to be worked on the project

Your colleague says that when it comes to EU Cohesion Policy funding, there is a legal basis for companies and governments to keep financial documents after a project is finished.

According to Article 82 of the Common Provision Regulation [\(EU\) 2021/1060](#), each partner institution is required to archive documents related to the project’s implementation for a minimum period.

All supporting documents should be kept for at least a five-year retention period from 31 December of the year in which the last payment by the managing authority to the project is made. During this time, the EU Commission has the right to carry out an audit on any project.

“Is that the only way EU Funding spending by companies and governments is monitored?” you ask. “No,” the colleague says. “There are plenty of other documents if you know where to look.”

## Where do they report?

\* HÓDMEZŐVÁSÁRHELYI  
**HÓDÚT**  
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Szeged • 6701 Szeged • Budapesti út • 6701 Szeged • Pó: 06-548-388 • Tűskés: 0-20-154-1-2  
Békéscsaba • 6000 Békéscsaba • Birtok: 1122 • Tüskés: 1122 • Tűskés: 1122 • Tűskés: 1122

\* NAT 681/2013-1-10/2013 sz. rendelet szerinti közzétételről

Jegyzőkönyv száma: Kp.A. 0123/2013  
Munkaszám: 301613600000

1/2oldal

**Vizsgálati jegyzőkönyv**  
**Építési kőanyag vizsgálata**

Vizsgáló laboratórium:

Neve: HÓDÚT Kft. Szeged Központi Mobil Laboratórium  
Címe: 6701. Szeged, Budapesti út  
Tel: 06-548-388 Fax: 06-548-388

Megrendelő:

Neve: Hódút Freeway Kft.  
Címe: 6050. Tiszakécske, Béke u. 150.

A mintavétel adatai:

Naplószám:	0210/A
Megnevezés:	NZ 0/4 Gánt
Mintát vette:	[REDACTED]
Mintavétel helye:	Dolomit Kft. H-8082. Gánt, Kőbánya
Mintavétel ideje:	2013-06-26
Átvétel ideje:	2013-06-28
Mintavételi eljárás:	MSZ EN 932-1:1998 8.8.
Mintavétel módja:	mintavétel depóniából
Vizsgálat időpontja:	2013-06-26 - 2013-07-01

Megjegyzés:

Figure 161: Real reporting documents received by the Hungarian investigative newsroom Direkt36 showing President Victor Orbán's father's company on contracts connected to the building of the M4 road; Source: Direkt36

Your colleague says that in addition to accounting documents, reporting documents are another source of information. Beneficiaries are required to disclose these reporting documents for transparency.

EU Cohesion Projects are particularly strong when it comes to transparency, since they contain the direct legal obligation of [full disclosure](#). Projects supported by EU Cohesion Funds can receive additional financial resources to cover the cost of undertaking disclosure.

[Regulation \(EU\) 2021/1060](#) covers this, your colleague says. He hands you a pile of printed paper explaining how recipients of EU Cohesion Funds are required to report:

- Transmission of financial data five times a year
- Annual review meeting
- Final implementation report
- Obligatory publication of all information and data

You learn that the EU is in the process of building a digital system to collect, compare and aggregate information on the beneficiaries of cohesion policy funding, alongside CAP and other structural funds. The resolution [on the digitalisation of the European reporting, monitoring and audit](#), was adopted by the European Parliament on 23 November 2021.

“Where else can I find data?” you ask your colleague.

“Everywhere,” he says. “Let’s go through some of them now.”

## Finding tenders

Over an afternoon with your colleague, you learn that in the EU, public contracts are awarded through a competitive tender process. Together you learn that the process is usually one of the following:

1. Open procedure: In an open procedure anyone may submit a full tender. This procedure is used most frequently.
2. Restricted procedure: Anyone may ask to participate in a restricted procedure, but only those who are pre-selected may submit tenders.
3. Competitive negotiated procedure: In competitive negotiated procedures anyone may ask to participate, but only those who are pre-selected will be invited to submit initial tenders and to negotiate. In some cases, negotiations may be necessary, especially when tendering contracts around defence and security, water, energy, transport and postal services.

You note down this other useful information:

- According to [EU legislation](#) public tenders must be used when central government authorities are buying services and supplies worth more than €140,000, or construction contracts worth more than €5,382,000
- Any company established in the EU has the right to compete for a public tender in any EU country.
- Using the [opentender.eu](#) portal, users can search and analyse tender data from 35 jurisdictions.
- Tenders from countries in Eastern Europe are often more transparent, because in Western Europe winning bids are often not published due to “business sensitivity”.

## FOI on the case

In your search for information about Hungary’s M4 motorway, you have learned that tender documents are sometimes available on public databases, like Kohesio. But a lot of the time, journalists need to put in a special request for information from a public body. This is called a freedom of information request (FOI).

In the spirit of transparency, EU residents have the right to access and obtain documents directly online, through registers and databases or by individual requests. But it’s not always so easy.

Your colleague tells you about the Dutch journalist and lawyer Liset Hamming who can help you work out how to send FOI requests. Liset specialises in making government information public and accessible. You call Liset for advice, and she tells you about an investigation she worked on accounting for lost children migrating through Europe.

According to the investigation—Lost In Europe—[18,292 unaccompanied child migrants went missing in Europe between January 2018 and December 2020](#). That’s around 17 children slipping off the records every day, often into the world of crime, human trafficking and prostitution. Liset wanted to send FOI requests to immigration and border enforcement authorities in 16 European countries to find documents about lost migrant children. She turned to the international [Alaveteli network](#), a group of platforms based on the same software that allows users to file FOIs in 16 European countries. Through the network, she was able to file requests for information in Croatia, Czech Republic,



France, Germany, Sweden, Hungary, Belgium, Greece and in the UK. Then, via other partners at [Ask the EU](#), help was offered for filing requests in Italy and Spain.

Liset explains the process for sending a FOI request to EU institutions using the website Ask the EU:

1. You register with the website.
2. You identify which body you want to send a request to.
3. You fill out the request – some of the text appears automatically – preview it, and then press "send".
4. When you get an answer, a message will come to your email. Sometimes you get an acknowledgement first and then later, within 15 working days (3 weeks) a response.

Remember: You never have to say why you want the information.

Liset tells you that if you want to send FOI requests to different European governments, it helps to find someone in that country who knows the system and can help, since there is so much variation in access and process. For the Lost in Europe investigation, experienced reporters from the Ask the EU network were able to help Liset navigate the individual requirements of the FOI regime in each country, pointing toward the relevant authority and translating or refining the wording of the request being made. In some other countries, Liset made her own contacts.

For more elaborate or difficult cases, you may wish to file your own requests directly to authorities, rather than via platforms. Journalists who regularly use FOI requests exchange best practice and share challenges and workarounds at conferences including the annual [Dataharvest](#) European Investigative Journalism Conference which has a conference track especially dedicated to FOI.

### When you get your FOI data

When you get your data, the work really begins. Now you need to interrogate your information by writing data biographies and finding stories and corroborating sources. Once Liset and Lost in Europe had some data, they ran a bootcamp for their journalists, data scientists and designers to analyse the most recent statistics, identify gaps in European laws, and start to pin down story ideas.



*Figure 162: FOI data including contracts needs to be interrogated using a data biography; Source: Pixabay*

When you have finished your call with Liset, your colleague explains that FOI in Hungary is getting more and more difficult. In November 2022, the Hungarian Parliament amended Act CXII of the 2011 Freedom of Information Act with Act XL of 2022 which purported to speed up court proceedings in data of public interest cases and create a new central public data register to enforce the publication obligation.

It sounded good. But civil society groups said that the law was introduced with the sole purpose of reaching an agreement with the EU that would allow them to access EU funds that had been held back. Opponents of the regime said the proposed changes would not dismantle the obstacles that had accumulated over the last decade stopping reporters from accessing information in the public interest. Those obstacles include extending the amount of time it takes to respond to requests from 15 days to

45 days, which may be extended to another 45, and the ability for authorities to change the grounds for refusal during possible lawsuits, prolonging procedures.

In fact, your colleague says, some journalists have tried to use FOI requests to access tender and procurement documents relating to the building of Hungary's M4 motorway. But the requests were refused. Instead, the newsroom has had to launch a public information lawsuit with support from a civil liberties union to get the information they needed.

### **Non-governmental sources**

The more you learn about the M4 project and the FOI process in Hungary, the more you see that not all information you need will come from the government. Especially not in where you are reporting in Hungary, where the government is hostile to the press. Alongside launching a public information lawsuit with a civil liberties union, your colleagues have formed partnerships with anti-corruption groups and research groups. These non-governmental sources will help you get more of the data you need.

Activists help you to find procurement documents using the [Hungarian Public Procurement Authority portal](#). These documents appear to show that two companies used subcontractors for construction, without notifying the tenderer. This violates public procurement law.

You also check for books and articles, academic studies, and scientific papers. In [JSTOR](#), a digital library, you find a paper called "[From Corruption to State Capture: A New Analytical Framework with Empirical Applications from Hungary](#)" by Mihály Fazekas and István János Tóth, originally published in a journal called Political Research Quarterly in June 2016.

#### **Exercise 7:**

On page 326, the authors detail some of the indicators of corruption in public procurement.

You take 10 minutes to note down some of the so-called "red flags" to share with your colleagues. They might help you identify fraud in the tendering process for the M4 motorway. The solution to this exercise can be found at the very end of this module.

1. What is one of the most straightforward red flags?
2. What is a simple way to fix a tender?
3. What is the effect of avoiding the publication of a call for tenders?
4. How does the type of tendering procedure indicate potential corruption?
5. How can eligibility criteria indicate corruption?

Earlier in this module you learned about 300 documents relating to state contracts won by companies connected to Órban. Now your non-governmental sources help you to analyse the data. The data seems to be telling you that each company has benefited enormously from the EU budget.

## The power of the crowd

Your editor asks for innovative ways to approach the newsroom's latest investigation. So far you have analysed hundreds of documents that appear to show how Órban's circle has benefitted from EU Cohesion Policy funding. You wonder if there was a way to fill in the gaps that the documents can't tell you. You begin to plan to crowdsource information about the construction contracts. You want to create a portal or a form where people can anonymously submit information about these infrastructure projects. But you need help from someone who has done an investigation of this kind before.

You email the British journalist Maeve McClenaghan of the [Bureau of Investigative Journalism](#) in London. In 2017, she began a crowdsourced investigation into homeless people dying, enlisting the help of the [Bureau Local](#), a collaborative, investigative network in the UK to track down data about people who had died on the street.



Figure 163: In 2017, the British journalist Maeve McClenaghan began a crowdsourced investigation into homeless people dying; Source: Pixabay

From speaking to Maeve, you learn that crowdsourcing, or community-based reporting, helps reporters fill in gaps and solve puzzles in investigations. After Maeve saw a one-off news story about homeless people dying, she began to look for official data about the numbers of homeless people dying across the whole country, only to discover that there was no official record of this data. So, she decided to create her own using submissions from citizen journalists and other interested people in the Bureau Local network.

The team at the Bureau created a simple Google form that requested basic information such as name and contact details, the estimated date of death, age, next of kin and location. The information was shared with experts and local homelessness organisations for fact-checking. Within 18 months, they had created a database with almost [800 recorded cases](#). The investigation was so successful, it prompted the Office for National Statistics, the UK's governmental agency for statistics, to start refining their own methodology around homelessness deaths.

You go back to your colleagues in the newsroom with this information and ask them whether your investigation into the corrupt use of EU Cohesion Policy Funding is suitable for crowdsourcing. To your surprise, they tell you that it isn't.

### Exercise 8:

They give you three reasons why your investigation into procurement contracts for Hungary's M4 motorway is not suitable for crowdsourcing. **Write three or four characteristics that make an investigation suitable for crowdsourcing** in the next 15 minutes. The solution to this exercise can be found at the very end of this module.

## Exercise 9:

Now write down in two or three bullet points why a crowdsourced investigation is not suitable for the M4. The solution to this exercise can be found at the very end of this module.

## Map Me Tender

Your colleagues have just told you that your investigation into procurement contracts for the M4 motorway in Hungary is not suitable for a crowdsourced investigation. But the editor is still looking for innovative ways to approach the newsroom's latest investigation. They have a novel idea: data visualisation.

One lunchtime, a colleague tells you about a data journalist called Ada Homolova who launched a visualisation tool to help newsrooms find stories in tender data. You decide to contact her to find out more.

Ada tells you that in 2018, she worked on [Elvis \(Map Me Tender\)](#) to help newsrooms find stories in tender data. Ada's team used data from the [OpenTender portals](#), a platform predating Kohesio that allows users to search and analyse tender data from 33 jurisdictions including the 27 EU member states plus Norway, Iceland, Switzerland and Georgia and all the EU institutions.

It took two years for Ada and her team to build a prototype of Elvis that allows users to filter tender data and display it as a network visualisation. The user could search for public spending in a specific country, sector, and year range and then display it as graphs or networks of financial relations. Users could also visualise parts of the public sector of a country — such as IT or health-care — or draw an entity network showing how a company or government institution works across borders.

The prototype was so big, containing so much data, that not all of it is still online. Today a reduced version exists, [visualising defence spending](#).

You want to know: what makes tenders and procurement good topics for data visualisation?

Ada says: “Tendering is quite a technical process and highly sector and country specific. The data sets are usually too big and in our opinion not very suitable for spreadsheet analysis. This makes them a good topic for visualisation.”

You begin to think about what kind of data you could visualise in your investigation.



Figure 164: A data visualisation using Elvis showing Austria's defence procurement 2005-2020; Source: elvis-website

## Visualising tenders in Hungary

After going through nearly 300 contracts, tenders and financial documents, your colleagues come to you with a breakthrough.

Records show that projects in Hungary funded by the EU constitute almost 90 per cent of the value of the state contracts – totalling billions of euros – won by companies linked to friends of Orbán.

You also have data showing that there is a high proportion of EU funded projects in the state contracts won by companies run by two other businessmen with close links to Orbán.

They want to know, how should you visualise this data? Your colleagues decide to send you on a course with Alberto Cairo, a professor at the University of Miami who is considered an expert in data visualisation. You come away from the course with these basic tips:

1. Add context: users need more than just graphics to understand a visualisation. Include titles and explain the context around the visualisation.
2. Look for patterns but don't oversimplify. Make sure you are comparing like-for-like, for example don't compare state contracts with private contracts.
3. Think about the purpose of the visualisation. Stay focussed on the facts and how they fit into your story.
4. Focus on the audience and the medium. Make sure your visualisation can be seen on phones, if that is where most of your readers will see it.

Your colleagues present you with the chart above. Then they send you a link to the chart in a draft of the story. They ask for your feedback, using what you have learned from your course.

### **Exercise 10:**

**Using the tips, take 10 minutes to write down three ways that this visualisation works for your story.** The solution to this exercise can be found at the very end of this module.

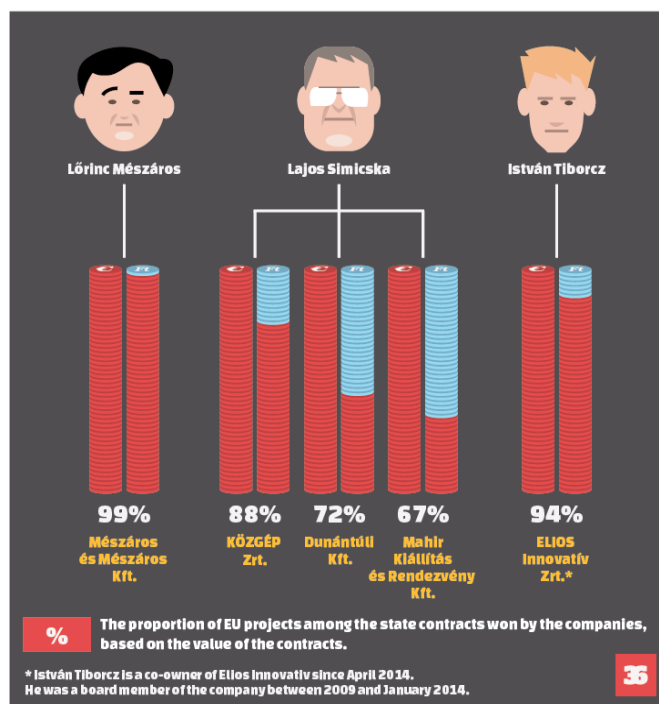


Figure 165: A data visualisation used by Direkt36 to show the proportion of EU projects won by companies connected to friends and associates of Orbán; Source: Direkt36, Gyula Németh

## Your turn

It's now five years since you worked on the investigation into Hungarian infrastructure projects funded by EU Cohesion Policy funding. You have moved back to your home country and you are ready to start your own investigation.

### Exercise 11:

Take up to 30 minutes to write a plan for an investigation into something funded by EU Cohesion Policy in your own country. Include the following:

1. What will you look for using [Kohesio](#)?
2. What questions should you ask about your data?
3. Where will you use a data biography?
4. What accounting documents do you need and where will you find them?
5. What reporting documents do you need and where will you find them?
6. What information will you need to write a freedom of information request?
7. Who will you send the FOI request to?
8. What non-governmental sources will you use?
9. Will you use crowdsourcing, and why?
10. Will you use data visualisation, and why?

The solution to this exercise can be found at the very end of this module.

## **Congratulations!**

Not only have you completed your investigation in Hungary, but you also now have a plan to start your next investigation in your home country.

For further reading, please see the following sources:

European Commission. (2017). [An overview of Subsidy Disclosure Practices in EU Member States](https://ec.europa.eu/competition/publications/reports/kd0617273enn.pdf). <https://ec.europa.eu/competition/publications/reports/kd0617273enn.pdf>

Melchior, S. (2017). [A Reporter's Guide to the EU](#). Routledge. Oniang'o, M. (2021, November 15). [How Three Reporting Teams Crowdsourced Groundbreaking Investigations](#).

Global Investigative Journalism Network. <https://gijn.org/2021/11/15/crowdsourcing-investigations/>

Let's now move to Module 12, where you will learn how to work collaboratively with other journalists in your investigations.

## **Module authors**

This module has been written by Hazel Sheffield of Arena for Journalism with help from Arena team members Brigitte Alfter, Jelena Prtorić, Ada Homolová and Trine Smistrup and Direkt36 editor András Pethö. The authors would like to thank everyone involved.



## Solutions for Module 11:

### Exercise 1:

1. It was one of the first investigations of its kind to use collaborative reporting – where two newsrooms worked together, rather than in competition.
2. The data was not held at EU level, nor by Member States, but by hundreds of smaller authorities.
3. The investigation revealed that the European Commission did not know, in any detail, where the EU Cohesion Policy funding ended up.

### Exercise 2:

The EU set up Kohesio to improve **transparency** and increase **awareness** of the investments carried out through cohesion funds. Kohesio contains data on more than 1.7 million **projects** and approximately 500 000 **beneficiaries** financed throughout the funding period 2014-2020.

The main source of data for Kohesio are the detailed **lists** with information on the financed projects. These lists are regularly published by the **Member States** and the Cohesion Funds' managing authorities. The challenge is that they are published on various national websites and data is not formally **standardised**.

To overcome this issue, Kohesio's project team developed **algorithms** to streamline and centralise data collection for Kohesio across national websites. When a new list of operations is published by the managing authorities, it is acquired by the project team and processed according to a predefined set of rules. This allows the **information** about projects co-financed by the EU to be stored and standardised. Project **titles and descriptions** are then machine-translated into all EU languages and location information is used to determine the latitude and longitude of the projects. Finally, **data** are made available in Kohesio.

### Exercise 3:

Starting in **October 2016** the **Integrated Transport Fund** contributed **€231 677 592,29\*** to establish a link between the North Great Plain region and the capital city. The listed beneficiary is **Nemzeti Infrastruktúra Fejlesztő Zrt.**, a development corporation 100% owned by the Hungarian state. This company has received **€929 647 356,21** in European Regional Development funds since 2009 for at least **84** projects.

### Exercise 4:

Is it possible for “the EU” to have decided something? Correct answer: 1.

Who speaks on behalf of the EU and can explain decisions made at EU level? Correct answer: 3.

How do people inside the EU institutions understand EU decision making levels? Correct answer: 2.

Which 2009 treaty transferred a sizeable chunk of political power from national governments and parliaments to EU level? Correct answer: 1.

To keep track of EU reporting, journalists should keep an eye on the following institutions: all answers are correct.

These are the correct matches with the reasons you should contact each institution: 1-b; 2-c; 3-a

When should you say a decision has been made by “the EU” in your reporting? Correct answers: 2&3.

#### **Exercise 5:**

1-c; 2-e; 3-b; 4-d; 5-a

#### **Exercise 6:**

1. A 2013 report on whether EU Cohesion Policy Funds on roads have been well-spent
2. European Court of Auditors
3. From EU Audits
4. To measure and compare the total cost of 1 km of audited road projects per counted traffic for several projects in Poland, Spain, Germany and Greece, to see if some countries are overspending.

#### **Exercise 7:**

1. When only a single bid is submitted.
2. To avoid the publication of the call for tenders in the official public procurement journal.
3. It is harder for competitors to learn about business opportunities and to prepare a bid.
4. The selection of a less open and transparent procedure can indicate the deliberate limiting of competition.
5. By tailoring the criteria or conditions to a single company. Overly complex or lengthy criteria can exclude competitors.

#### **Exercise 8:**

Crowdsourced investigations are suited to investigations that are informed by a wide number of people’s concerns, reflecting their experiences. For example, the Australian Broadcast Corporation crowdsourced stories of mistreatment in nursing homes for a [three-year exposé](#) which led to changes in government policy and funding.

Crowdsourced investigations are useful when there is no other way to get the data. For example, Maeve at the Bureau Local turned to crowdsourcing when she realised no single authority was collecting data on people who died while experiencing homelessness.

Crowdsourced investigations are suited to emotional issues, where many people are affected. For ABC’s nursing home investigation, they mapped out a community of interest that included thousands of people affected by the issue, from residents to nursing home staff, even managers of facilities. As the coverage of the issue grew, so did people’s anger, prompting more people to contribute.

Crowdsourced investigations are better for stories that do not require secrecy. Crowdsourcing is about investigating openly. After rioters in the US stormed the Capitol Building in January 2021, journalists from [Bellingcat](#), a Netherlands-based investigative journalism group, issued a call on Twitter for people to submit their own videos and visual evidence using a Google form. They got 650 responses. Some of this evidence was used to identify the [last moments of a protestor](#) before they were shot by police.

### **Exercise 9:**

Your investigation into the M4 involves a small group of people close to Órban.

You can do your work using tender documents and other data.

Your investigation is a follow-the-money type of investigation rather than an open, emotional subject affecting lots of people.

Your investigation requires a high level of discretion.

### **Exercise 10:**

- The visualisation includes an explanatory title.
- The visualisation fits in the story at that moment.
- The visualisation compares like-for-like.
- The visualisation is simple and clear.
- The visualisation can be read on phones as well as computers. It would also work in print.

### **Exercise 11:**

1. Information published by Member States and managing authorities with information about financed projects.
2. Where did the data come from? Who collected it? How was it collected? Why was it collected?
3. For more complicated data.
4. Payslips; Employment contracts; Proof of payment; Documents setting the percentage of time to be worked on the project; Accounting documents can be obtained from the partner institution up to five years after the completion of a project.
5. Transmission of financial data five times a year; Annual review meeting; Final implementation report; Obligatory publication of all information and data; They can be obtained through freedom of information requests, non-governmental sources and crowdsourcing.
6. The name of the body you want the information from; The name of the information you need; Perhaps some knowledge of the law around transparency for this information
7. The body you want the information from; You might use a platform such as AsktheEu.org
8. Activists; Academic studies, books and articles and scientific papers
9. Yes, if your investigation is informed by a wide number of people's concerns and reflects their experiences.; Yes, if there is no other way to get the data.; Yes, if your issue is emotional.; Yes, if your story does not require secrecy.
10. Yes, if you include context like titles and explanations.; Yes, if you can use patterns without oversimplifying.; Yes, if the visualisation is focussed on the facts and how they fit into your story.; Yes, if the visualisation can be seen and understood on the medium used by your audience.

# Module 12 – Collaborative Reporting: An Introduction

## Basic information

Module number	12
Module title	<b>Collaborative reporting: an introduction</b>
Duration/study load	8 hours
Keywords	Collaboration, cross-border journalism, intercultural communication, networks
Learning outcomes	<p>At the end of the module, you will acquire the following skills (related to the Journalism competencies in the Tartu Declaration (ETJA 2021):</p> <ol style="list-style-type: none"> <li>1. Accounting for journalistic work (Tartu 7) <ol style="list-style-type: none"> <li>a. Students will get an idea of how to create quality journalism with impact</li> <li>b. An introduction to funding sources for cross-border collaborative journalism.</li> </ol> </li> <li>2. Cooperating (Tartu 8) <ul style="list-style-type: none"> <li>● The seven steps of cross-border collaborative journalism and several examples of successful cross-border collaborations.</li> <li>● Avoiding common challenges with intercultural communication, an introduction to journalism networks and how to find useful networks.</li> </ul> </li> <li>3. Acting as a journalism entrepreneur (Tartu 9) <ul style="list-style-type: none"> <li>● Fundraising for cross-border stories</li> <li>● Selling cross-border stories to editors</li> </ul> </li> </ol>
Description	<p><b>What is it about?</b>  Module 12 will introduce journalism students to the concept of collaborative reporting and how to effectively report on EU Cohesion Policy in cross-border teams.</p> <p><b>What are you going to learn?</b>  Students will learn how interdisciplinary and cross-border teams can research and cover cohesion policy matters more effectively and with a larger impact on local and EU publics. The module will explain the seven steps of cross-border, collaborative journalism and introduce the concept of intercultural communication. Students will learn from practitioners' insights and examples. They will be introduced to networking and top journalism networks and come away with a plan about how to move on from the course.</p> <p><b>How are you going to learn?</b>  Students will be introduced to the tenets of collaborative, cross-border reporting and learn how to think critically about communication and existing hierarchies, applying due diligence through exercises and practical applications of their skills.</p>

Sequentiality	Linked with Module 11, where we present the most up-to-date developments in journalistic research methods.
Authors' contacts	Hazel Sheffield and Brigitte Alfter, Arena for Journalism in Europe <a href="mailto:hazel@journalismarena.eu">hazel@journalismarena.eu</a> , <a href="mailto:brigitte@journalismarena.eu">brigitte@journalismarena.eu</a>

## Glossary

Cross-border journalism	Journalists from different countries decide on an idea of mutual interest, gather and share material and publish to their own audiences
Intercultural communication	Communication across different cultural boundaries. This involves some knowledge on the communicator about other cultures, including tensions and sensitivities.
Memorandum of Understanding	A Memorandum of Understanding or MOU is an agreement that states each party's intentions to take part in an investigation, including their roles and responsibilities.
MOOC	Massive Open Online Course
Networks	The network of sources a journalist has nurtured throughout their career. In cross-border journalism, that network grows to include journalists in other countries and their respective networks.

## About this module

By its very nature, the EU Cohesion Policy is cross-border, concerning the relationships between EU Member States. The way journalists cover the EU Cohesion Policy must also cross borders.

Cross-border journalism is a relatively new field and continues to rapidly develop. This module will introduce you to the most recent networks, tools and techniques in cross-border journalism so that you are well-equipped to start their own investigations.

We'll start with a real-life scenario, in which you, the journalist, have discovered a potential cross-border story. Then we will walk you through the steps to making your investigation come to life, from finding a team, overcoming challenges, communicating across cultures, joining journalism networks and publishing your findings.

At the end you will sketch a plan for your own collaborative, cross-border investigation so that when the MOOC is over, you are ready to go!

## The start of the story



*Figure 166: In our story, some residents have opposed the building of a motorway near their homes; Source: Pixabay*

Put yourself in the following scenario. You are a freelancer, just graduated from journalism school, writing news stories for a local newspaper in your country. One day, you are covering the building of a new motorway connecting two remote and rural towns. You visit the towns and learn that some residents have opposed the plans. They tell you that the motorway will cut through old growth forests, and that some of the workers who have been building the motorway are sleeping next to the building site in tents. The workers have told some of the villagers they have travelled from a country further east to work on the project, but they haven't been given any accommodation so they sleep in tents.

You do some more research to find out how the motorway is being funded using [the EU](#) database Kohesio. You learn that 85% of the money is coming from EU Cohesion funds. However, the ultimate beneficiary or the recipient of the EU funding is not a company from your country, but one in Spain. You had a Spanish friend at journalism school, so you give her a call to see if she has heard of them. Your friend has not heard of the company, but she does a little Googling, and finds out that it is part of a franchise of building companies headquartered in the Netherlands.

Now you have the beginning of a cross-border story requiring journalists from not just one country, but two. In the next section you'll learn how to get started with your cross-border investigation.



## The seven steps: an introduction

How, you wonder, can you begin an investigation of this scale?

### Exercise 1:

Luckily your friend learned about something called cross-border journalism while you were at university and she tells you it has four significant characteristics. Take five minutes to put them in the right order. The solution to this exercise can be found at the very end of this module.

- a) publish to their own audiences
- b) decide on an idea of mutual interest
- c) journalists from different countries
- d) gather and share material

During her classes, your friend learned about the seven steps of cross-border journalism. She tells you about this process using a diagram, where one step leads to the next.

Your friend tells you about two cross-border investigations that she knows about. She suggests that you use these case studies as a guide to make your own seven-step plan.

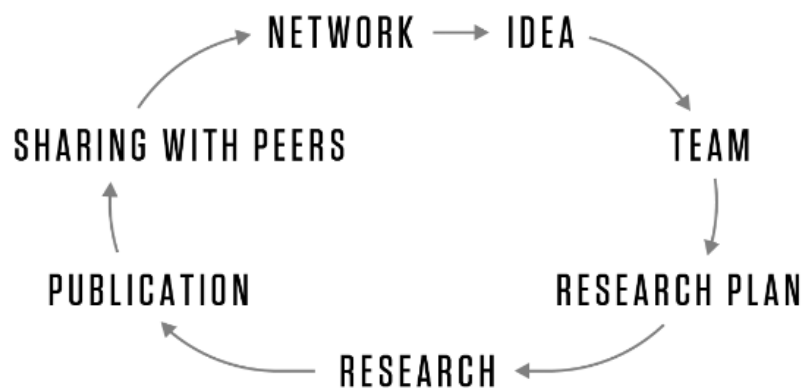


FIGURE 2.1 Diagram of the seven-step work process.

*Figure 167: Here's how the seven steps of cross-border journalism fit together;*  
Source: Alfter, B. (2019). *Cross-border Collaborative Journalism. A Step-By-Step Guide*. Routledge, p. 20

## Behind the scenes of Money to Burn



Figure 168: *Money to Burn* is a cross-border story about the effect of Western European subsidies on Estonia's forests;  
Source: Liis Treimann

The first case study your friend knows about is an investigation called *Money to Burn*. You watch the following video and make notes ready to answer some questions afterwards. Think about the seven steps: how to go from an idea to an investigation, including composing a team, finding media partners, team routines, setting up digital structures, and selecting the story focus.

Watch now: [Money to Burn: behind the scenes of a cross-border investigation](#)



Figure 169: *Video "Money to Burn"*; Source: Argos

**Exercise 2:**

Take 20 minutes to write one or two points for each section of the table below. When you are ready to see the answers, click resolve. The solution to this exercise can be found at the very end of this module.

Idea <i>What was the idea for the investigation?</i>	
Team <i>How would you describe the cross border team?</i>	
Research (and work) plan <i>How did the team members work together?</i>	
Research <i>What kinds of research did they do?</i>	
Publication <i>How did the team publish their story?</i>	
Sharing with peers <i>How did the team share their story with peers?</i>	
Network <i>Are any journalism networks mentioned?</i>	

The video makes it look so easy! But you know that all investigations face challenges. In the next section we are going to learn about some of the challenges you might face during collaborative work and how to overcome them.

## Step-by-step

Over Zoom, you and your friend discuss some of the realities of a cross-border investigation, including the difficulties that might arise at each stage.

### Exercise 3:

Take five minutes to note down some challenges you might face for each of the following points. There are lots of resources available online to help you with this task, including [this step-by-step guide](#), an [interesting N-Ost resource](#) on ethics and [the following video](#).

The solution to this exercise can be found at the very end of this module.

1. The network
2. The idea
3. Team
4. Research and work plan
5. Research
6. Publication
7. Sharing with peers

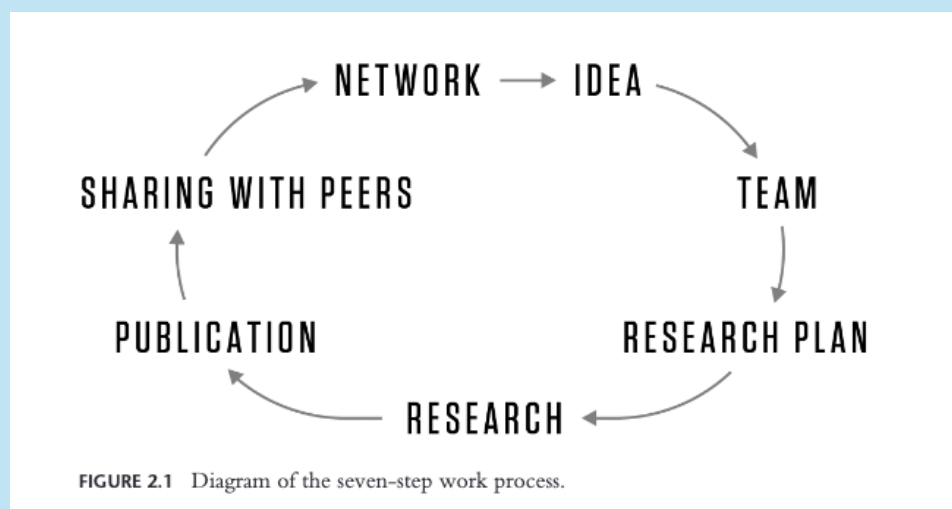


Figure 170: The seven steps of cross-border journalism;

Source: Alfter, B. (2019). *Cross-border Collaborative Journalism. A Step-By-Step Guide*. Routledge, p. 20

## Beginning to think across borders

“Wait,” your friend says. “You just want to investigate one motorway in your country. What does that have to do with the rest of Europe?”



You begin to think about the connections between EU money, the workers who are from another EU country, the building company in Spain and the conglomerate that owns the building company in the Netherlands. Together they form a web of businesses that cross the EU. You wonder if the conglomerate in the Netherlands owns building firms in other European countries, or if the Spanish building firm is involved in other building projects.

Figure 171: *Cities for Rent* was a 2022 investigation by more than 25 investigative and data journalists from 16 European countries into corporate landlords in Europe; Source: Moritz Wienert

Many of these issues – intra-EU labour, subsidies for the building of the motorway via EU Cohesion Funds, the regulation of public tenders – related to EU regulations. You realise that even if you were to publish a story in your country, it would not be able to have an impact at the level of authority. To have a political impact, your reporting will need to go beyond the national press.

You are beginning to think cross-border. But how can you begin to apply this thinking at both levels: transnational and national?

Your friend tells you about another example: an investigation called [Cities for Rent](#). Together you watch the video. This was a transnational and national mapping exercise telling local stories. Each of the stories was enriched by putting it in the context of a much bigger European story: the crisis of housing created in part by the acquisition of homes by corporations.



Winners European Press Prize 2022: "Cities for rent"

Figure 172: [Click here to watch the "Behind the Scenes" of Cities for Rent](#)

**Exercise 4:**

While you watch the video, think about which elements were national, and which were transnational. Take one minute to answer the question: what kind of cross-border investigation is this?

- Current news event with international reach
- Organisation stories involving international actor
- Chain story involving several countries
- Comparative story

The solution to this exercise can be found at the very end of this module.

**Test your cross-border knowledge**

After speaking with your friends about how to put together a cross-border investigation, you are feeling more confident about starting one yourself.

You know from watching this video of editors talking about the history of cross-border collaborative journalism that it is good to speak to possible publishing partners as early as possible in the process.

At 16 minutes into the panel discussion, Gerard Ryle, director International Consortium of Investigative Journalists, talks about the first cross-border investigation he ever did, into the export and recycling of bones for plastic surgeries:

“I went to the Washington Post and I said, we’ve got this great story. That was the lesson that I learned: the investigations editor of the Washington Post said, ‘How do we trust any of this reporting, we don’t know who these reporters are.’ And that was when I realised that if you’re going to do this kind of reporting, you need to bring the reporters from the publication in at the very beginning so that they actually trust the reporting.”

Bearing Ryle’s thoughts in mind, you decide to talk to the editor of a local newspaper about your idea for a cross-border collaboration. But the newspaper editor has never heard of cross-border collaborative journalism and has lots of questions about the process.

### Exercise 5:

Take 10 minutes to select the correct answers to their questions below. The solution to this exercise can be found at the very end of this module.

1. In cross-border journalism, networks and networking is usually:
  - a. Both low and high intensity, involving close collaboration on investigations and helping out colleagues in other countries on smaller tasks
  - b. High intensity, involving months of communication and work on the same investigation
  - c. Low intensity, involving talking informally at conferences with colleagues and helping to link to others with contacts.
  
2. Money to Burn is what kind of cross-border investigation
  - a. Current news event
  - b. Organisational story
  - c. Chain story
  
3. What is usually the most tense part of a cross-border project and why?
  - a. Putting together a research team, because it's hard to choose the right people
  - b. The run up to publication, because team members must now work hard under a lot of pressure not to let one another down
  - c. Coming up with the idea, because there are so many stories that need attention
  
4. What effect can sharing the investigative work with peers post-publication have? Select all that apply:
  - a. Journalists provide an analysis of the process and how it can be improved
  - b. Journalists involved make new networks which can be the first step towards their next collaboration
  - c. Journalists reveal their process to others without fear of someone else stealing their ideas
  
5. What are some of the aspects that can make the run up to publication stressful? Select all that apply.
  - a. pressure to publish from sources
  - b. legal threats
  - c. a media partner breaking the embargo
  - d. a media partner dropping out



## Do you copy?

You begin your cross-border investigation, recruiting a journalist from the Netherlands to take part in your cross-border team. You agree to meet in Madrid at the newspaper offices of your Spanish colleague to plan your research. When the day of the meeting arrives, the journalist from the Netherlands arrives in a windbreaker jacket and trainers. The Spanish journalist looks at him in horror: they are about to go into the newspaper office where she is just an intern, and she is worried that he is not dressed smartly enough to make a good impression. The journalist from the Netherlands is confused: to him, his clothes are appropriate for a breezy spring day. To dress up in business attire might seem self-aggrandising – after all, they are recent students, not interview candidates or employees.



*Figure 173: You are about to meet your cross-border team for the first time in Madrid when a crisis of communication occurs; Source: Pixabay*

Just then, the editor you are visiting appears, sees the look of horror on the face of your Spanish colleague, and knows instantly what is going on. They give you a brief history of intercultural **communication**. At the end, they say, you will know how to solve this issue. While you are listening to the history below, you try to guess what the solution will be.

The editor explains the following: Some people might dismiss differences between cultures as simple clichés based on outdated stereotypes. But the idea that every country has their own habits and customs has been studied for decades by business scholars. An understanding of intercultural **communication** can be useful when working in cross-border teams.

Let's look at the two schools of thought: **functionalist** and **interpretative**.

In the 1970s, the Dutch sociologist **Geert Hofstede**, developed his theory by comparative analysis of large datasets of staff in the global corporation IBM.

Hofstede developed a set of categories, or what he called “dimensions”, in order to build national profiles, which were easy to navigate and compare. Hofstede's thinking became the underpinning of the **functionalist** school of intercultural **communication**, which sorts the characteristics across cultures into fixed categories. You might, for example, find articles from the **functionalist** school with titles like: “how to do business in xx-country”.

Critics consider Hofstede's dimensions too static and too deterministic: some also point out that the categorisations themselves cannot avoid their own bias and thus limit rather than promote cross-culture understanding.

The **interpretative school** reads cultural phenomena as symbols of the different world views of individuals. This school believes that an understanding can be reached between cultures by focussing on shared interests, rather than differences.

You don't have to choose between one or the other school, the editor says. But it might help to be aware of both. Can you guess what one thing can surmount differences in cultures?

Quickly, you write down one word in your notebook: **communication**

“That’s right,” the editor says. “Most problems can be solved with clear **communication.**”

The editor invites you into an office where you sit around the table. Then he remembers a game he knows that can help you all understand intercultural differences.

## Normal People



You are visiting an editor at a newspaper in Spain, when you run into a problem with communication between your two team-mates. An editor invites you into an office to discuss your differences.

The editor you are visiting spots the problem and suggests an exercise he calls the “Normal People” exercise, based on the TV adaptation of a [book by Sally Rooney](#). He guides you to a conference room and asks you if you’ve ever read the book or seen the TV adaptation.

*Figure 174: The TV series Normal People showed how difficult it was for two characters from contrasting social backgrounds to communicate; Source: Pixabay*

He explains that in the story, the two main characters Marianne and Connell come from different social backgrounds, which affects the way they behave in certain situations.

### Exercise 6:

If you have watched the series, he says, try and write down a short description of the differences between the backgrounds of the two characters and how they behave differently in different situations.

If you haven’t watched it write down a short description of your own social class and how it affects the way you behave. This shouldn’t take more than ten minutes.

When you’re ready, take a look at some answers at the very end of this module.

You discuss how Marianne and Connell might behave in a team: Connell might not speak up if he had a problem, fearing he didn’t know how to behave. Marianne might not be aware of the financial struggles of other teammates, because she hasn’t experienced them herself.

Then the editor takes a book off the shelf and turns to page 68: “The main task in a journalistic team is to carry out professional journalism to the best possible standards. In this context good communication is one more technique in the toolbox, best dealt with in an open dialogue, with mutual respect and with the prevailing tone one of open-minded interest,” he reads.

Then he puts the book on the table. “Feel free to borrow this if you want to learn more,” he says. The book is called [Cross-border Journalism, by Brigitte Alfter](#).

You propose your investigation to the editor at the Spanish newspaper. To find out more about how to pitch your story, continue to Module 13.

To your surprise, the editor agrees to write a letter of intent to publish your story.

This is a vital part of achieving funding for your investigation as we will discover on the next page.

### Where to find funding

Now you have a team and a promise from an editor to publish your story, you will need to find some funding.

Funding can vary from a few hundred euros to tens or even hundreds of thousands, depending on the project.

For several years now, there have been two major sources of funding for cross-border investigations in Europe.



*Figure 175: IJ4EU supports cross-border investigations of public interest in Europe; Source:*

Since 2009, the European [Cross Border Grants Programme](#) has supported professional journalists who have good ideas for cross-border investigations on European subjects, for European audiences – making any investigation into EU Cohesion Funds a great fit! The grant is administered by Journalismfund Europe, an independent non-profit organisation established in 1998 to kick-start investigative journalism in Flanders. In 2008, the team turned to cross-border journalism. Journalismfund Europe originated from the Pascal Decroos Fund, which was set up by family and friends of the [pioneering Belgian journalist](#) to continue his legacy after his tragic death at the age of 33.

In 2023, for example, there were four application rounds, when teams of journalists from at least two countries in Europe could apply for money to cover working time and expenses, with the option of a mentor. A total of €200,000 is available to distribute throughout the year, meaning most teams get around a few thousand euros.

Investigations that require more extensive funding should consider IJ4EU, which supports cross-border investigations of public interest in Europe. In 2022/23, for example, IJ4EU disbursed €1.23 million in grant funding to watchdog journalism, along with practical, editorial and legal support.

Teams of European journalists can apply for up to €50,000 with the support of a newsroom or €20,000 plus mentoring if they are all freelancers. The Investigation Support Scheme is managed by the Vienna-based [International Press Institute](#) (IPI), a global network of editors, media executives and leading journalists for press freedom and the Freelancer Support Scheme is run by the [European Journalism Centre](#) (EJC), an international non-profit headquartered in the Netherlands, focused on building resilience into journalism through grants, events, training and media development.

You have the support of a Spanish newsroom and the involvement of two or more journalists from different European countries. Take five minutes to look at the eligibility criteria for the two grants and the next set of deadlines and decide which one you would apply to.

## Funding closer to home



Figure 176: Journalismfund has an [Earth Investigations Programme](#) that is designed for environmental issues that transcend borders;  
Source: Journalismfund

It's also worth looking at subject- and funding-specific opportunities for your investigation.

Some funders only give grants for investigations focussing on specific subjects, while others are only available to journalists from certain countries.

In this module, you are focussing on a story about road building. You know that the motorway in question will cut through old growth forests and that the construction workers are sleeping in tents. Depending on the angle your research takes, you could be eligible for grants that focus specifically on the environment or on labour rights.

Journalismfund has an [Earth Investigations Programme](#) that is designed for environmental issues that transcend borders, for example.

JINN, or Journalists in Need, [had a fund](#) designed to expand cross-border cooperation between journalists from Ukraine and Germany.

Funding opportunities are constantly changing. Finding and applying for grant-funding can be time intensive. It's worth making a note of any deadlines, even if they are very far away, to make sure you can be prepared.

Journalism networks can help you stay ahead of funding opportunities. The Global Investigative Journalism Network has a [guide to funding opportunities for journalists](#), including some for cross-border, collaborative investigations.

Take five minutes to search for smaller topic- or country-specific grants for which you may be eligible. What are the deadlines? What do you need to apply?

## Introduction to journalism networks

In the previous section, we looked at funding opportunities and the networks that can help you find them.

Journalism networks are a relatively new phenomenon and vary between closed groups of journalists working together on specific investigations, to open, topic-centred networks of journalists and newsrooms who share their stories and ideas. Now you have a team, a topic and some funding, you might want to consider joining a network of journalists to find out if anyone else in Europe is also working on a similar story. You might be able to learn from one another – or even work together.



*Figure 177: Arena for Journalism is an open network that grew out of the annual Dataharvest conference in Mechelen, Belgium; Source: Arena for Journalism*

## Journalism networks: a brief history

The first cross-border journalism network was set up in 1997 by Charles Lewis. It was called ICIJ, and it came at a moment in history when other scholars were exploring ideas about the fragmentation of governance and the networked society.

In the 2000s, the field developed without much notice by journalism scholars. But that changed with a series of huge, world-changing investigations including:

1. Wikileaks' cables in 2010
2. Offshore Leaks in 2012
3. Lux Leaks in 2014
4. Football Leaks in 2016
5. Panama Papers in 2016
6. Paradise Papers in 2017
7. Pandora Papers in 2021

Today there are numerous networks we might now define as closed, or restricted to a certain number of journalists, including:

- **The International Consortium of Investigative Journalists Inc (ICIJ)** was launched in 1997 by American journalist Charles Lewis as an initiative of the Center for Public Integrity. By 2000, the ICIJ consisted of 75 investigative reporters in 39 countries. It was responsible for Lux Leaks (2014), the Panama Papers (2016) and the Pandora Papers (2021).
- began in 2015 when four *Der Spiegel* journalists began to discuss a cross-border network with a partner from the Romanian Centre for Investigative Journalism.
- **Investigate Europe** formed around 2016 out of frustration for how the Euro crisis was being reported. It has a flat hierarchy. Listen to [this podcast](#) to find out more.



It's also worth mentioning the [Global Investigative Journalism Network \(GIJN\)](#), which was founded in 2003 when 300 journalists from around the world gathered for the second Global Investigative Journalism Conference in Copenhagen. Since then, the network has grown to 244 member organisations in 90 countries. Unlike the earlier examples, the GIJN is an open-access network that does not produce any journalism, but organises the Global Investigative Journalism Conference.

Perhaps even more exciting are the open networks that come together for a single investigation before disbanding. These are more accessible to inexperienced journalists – after all, you can just start one yourself. Money to Burn and Cities for Rent are two examples of this kind.

- [Arena for Journalism](#) is a foundation based in the Netherlands and formed in 2019 with a mission to support cross-border collaborations in Europe with financing, infrastructure, connections, advice and other kinds of support. Arena grew out of the annual Dataharvest conference in Mechelen, Belgium – a great place to start when building your own network!

## Your turn

This module has used a fictional scenario to demonstrate some of the elements involved in putting together a cross-border investigation.

### Exercise 7:

Now, take half an hour to write a plan for a real cross-border investigation. Include the following:

- What will the seven steps of your investigation look like?
- Is your investigation a chain story, a current news event, an organisation story or a comparative story?
- What publishers should you approach with your investigation and when?
- What kind of skills will you need in your team?
- What countries will your team-members come from?
- Should you anticipate any intercultural communication problems?
- What funding will you apply for?
- When are the deadlines and what do you need to apply?
- What networks might be useful for your investigation?
- What events could you attend to grow your own network?

Arena for Journalism has open networks of journalists that you can join for several topics, including climate, food and water and labour rights. Find out more at [Arena](#).

## **Congratulations!**

Not only have you learned all the many steps that go into a cross-border investigation, but you also now have a plan to start your own.

For further reading, please see the following sources:

Alfter, B. (2019). [Cross-border Collaborative Journalism. A Step-By-Step Guide](https://www.routledge.com/Cross-Border-Collaborative-Journalism-A-Step-By-Step-Guide-1st-Edition/Alfter/p/book/9781138613638). Routledge  
<https://www.routledge.com/Cross-Border-Collaborative-Journalism-A-Step-By-Step-Guide-1st-Edition/Alfter/p/book/9781138613638>

Calatayud, Jose Miguel (2020): [Journalists Across Europe Collaborate to Cover Airbnb and Other Housing Issues – The Housing Project is fostering cross-border investigations](#). Nieman Reports, Harvard University.

Krüger, U.; Knorr, C. & Finke, F. (2019): [Cross-Border Non-Profit Investigative Journalism Networks: A Structural Analysis of the Field](#). Conference paper at the Global Investigative Journalism Conference in Hamburg, p. 404-429.

Let's now move to Module 13.

## **Module authors**

This module has been written by Hazel Sheffield of Arena for Journalism with help from Arena team members Brigitte Alfter, Jelena Prtorić, Ada Homolová and Trine Smistrup. The authors would like to thank everyone involved.



## Solutions for Module 12:

### Exercise 1:

c-b-d-a

### Exercise 2:

Idea <i>What was the idea for the investigation?</i>	<ul style="list-style-type: none"> <li>● Worrying signals that Estonian forest is being exported to other EU countries to be burned</li> </ul>
Team <i>How would you describe the cross border team?</i>	<ul style="list-style-type: none"> <li>● Multi-disciplinary, including different skills</li> <li>● From many countries</li> </ul>
Research (and work) plan <i>How did the team members work together?</i>	<ul style="list-style-type: none"> <li>● “Radical sharing” or transparency between journalists</li> <li>● Encrypted online environment for sharing material</li> <li>● Design sprint in Estonia at the end</li> </ul>
Research <i>What kinds of research did they do?</i>	<ul style="list-style-type: none"> <li>● Reporters in the forests talking to protesters</li> <li>● Geo-spatial data using mapping software</li> <li>● “Boots on the ground” in locations of suspected tree felling</li> </ul>
Publication <i>How did the team publish their story?</i>	<ul style="list-style-type: none"> <li>● Network of publishing partners</li> <li>● Multimedia story distributed in print, and broadcasted on TV, radio and online</li> </ul>
Sharing with peers <i>How did the team share their story with peers?</i>	<ul style="list-style-type: none"> <li>● Behind the scenes video to show friends and colleagues how it was done</li> </ul>
Network <i>Are any journalism networks mentioned?</i>	<ul style="list-style-type: none"> <li>● IJ4EU funding network</li> </ul>

### Exercise 3:

#### 1. The network

- Some journalists might not want to share sources. But they don’t have to! In cross-border journalism, each journalist’s network grows to include journalists in other countries and their respective networks.
- Not everyone can be involved to the same extent. That’s ok. Networking can have varying degrees of intensity. While investigative journalism can be very intense, low-intensity collaborations can emerge from discussions about working practices when journalists meet at conferences, for example. The type of cooperation required for a task might include:

- One-off help for a task in another country, for example by filing a request for information with a public body.
- Loose cooperation where the tasks are clearly limited in scope.
- Close cooperation, working in a research team together with other people in different countries.

## **2. The idea**

- Story ideas are hard to come up with! This is a key moment in the work and requires some deep systematic thinking.
- It can be difficult to figure out what kind of investigation you want to do. Your cross-border story will likely fall into one of these categories:
  - Current news events with international reach
  - Organisation stories involving international actors like the EU, NATO or the UN.
  - Chain stories, where a chain of events is taking place in several countries, connected through activities like trade or crime
  - Comparative stories where developments are occurring simultaneously in several countries but without any direct connection.

## **3. Team**

- All investigations call for different skills. Think about which competencies or skills you need. It might include the following:
  - Some people might have what we call “hard competences” or experience with certain subjects, certain types of necessary sources or relationships, or skills with data.
  - Others can bring certain “soft competences”, which include qualities like trust, sympathy and the capability to cooperate.
- Not all countries have the same standards. Don’t assume that journalists across countries agree on what makes a good story or what methods can be used to acquire information.
- Some team members might not work hard, slowing the investigation down. Use a memorandum of understanding to outline your common goals and values, alongside expectations for team members and deadlines.

## **4. Research and work plan**

- Difficult to work out how long parts of the investigation will take. Work backwards from your deadline to figure out how long you have, in which to do everything.
- Publisher partners can be hard to find. Contact editors – they need to be on board with your ideas early.

## **5. Research**

- Research traditions and the availability of information will vary from country to country. Each tradition has its own strengths and weaknesses.
- Working with journalists across cultures can foster conflict. We will consider some of the complexities of cross-cultural communication later in this module.
- Someone might make mistakes. When sharing material with your team, fact-checking must be carried out to the highest available standard.

## 6. Publication

- The publishing process can be stressful. Team members must work hard under a lot of pressure not to let one another down. Pressure points might include:
  - pressure to publish from sources
  - legal threats
  - one media partner breaking the embargo
  - other media partners dropping out
- You are more likely to be successful when you communicate often, sharing the burden and keeping promises with other team members.
- You might get legal threats.

## 7. Sharing with peers

- Other journalists might steal your ideas. But cross-border journalism is all about sharing. After publication, journalists in cross-border projects tend to present their findings to their peers, often internationally. This has two main effects:
  - Cross-border journalists provide an analysis of the process and how it can be improved.
  - The journalists make new networks which can be the first step towards their next collaboration.

### Exercise 4:

Cities for Rent was a comparative investigation, comparing corporate landlord and rent prices in several countries.

The investigation was transnational, because the same cause for rising rent could be found in several countries. But it was also local, as each dataset was specific to the local area.

### Exercise 5:

1. In cross-border journalism, networks and networking is usually:
  - a. **Both low and high intensity, involving close collaboration on investigations and helping out colleagues in other countries on smaller tasks**
  - b. High intensity, involving months of communication and work on the same investigation

- c. Low intensity, involving talking informally at conferences with colleagues and helping to link to others with contacts.
2. Money to Burn is what kind of cross-border investigation
    - a. Current news event
    - b. Organisational story
    - c. **Chain story**
  3. What is usually the most tense part of a cross-border project and why?
    - a. Putting together a research team, because it's hard to choose the right people
    - b. **The run up to publication, because team members must now work hard under a lot of pressure not to let one another down**
    - c. Coming up with the idea, because there are so many stories that need attention
  6. What effect can sharing the investigative work with peers post-publication have? Select all that apply:
    - a. **Journalists provide an analysis of the process and how it can be improved**
    - b. **Journalists involved make new networks which can be the first step towards their next collaboration**
    - c. Journalists reveal their process to others without fear of someone else stealing their ideas
  7. What are some of the aspects that can make the run up to publication stressful? Select all that apply.
    - a. **pressure to publish from sources**
    - b. **legal threats**
    - c. **a media partner breaking the embargo**
    - d. **a media partner dropping out**

### Exercise 6:

#### Marianne

- Marianne is from an upper-class background.
- She is unpopular at school because she is seen as too studious and stuck-up.
- She applies for the same scholarship as Connell and when she gets it, she is not that excited. It makes no difference to her life, even though it changes everything for Connell.
- At parties at Trinity College, Marianne fits in with the other wealthy students in a way that Connell does not. She goes to parties and has lots of friends.

#### Connell

- Connell is from a working-class background. His mother is a cleaner for Marianne's family.
- He is upset when his mother tells him that Marianne's family might disapprove of her relationship with him because he is lower class.
- At Trinity College Dublin, Connell struggles to fit in because many students come from wealthy backgrounds. He feels like they come from a different world.
- Connell doesn't have the confidence to speak up in class.

# Module 13 – Training Journalists to „Sell“ Their Stories

## Basic Information

Module number	13
Module title	Training journalists to ‘sell’ their stories
Duration/study load	8 hours
Keywords	Pitching; Multimedia Format; Research; Inverted Pyramid; News; Storyboarding; Social media strategies; Local Angle; Audience engagement
Learning outcomes	<p>At the end of the module:</p> <p><u>affective LO: understand</u> Students should be able to find the right angle for their EU Cohesion Policy stories</p> <p><u>cognitive LO: apply</u> Students should be able to present their ideas on potential EU Cohesion Policy stories convincingly</p> <p><u>affective LO: receive</u> able to consider the best way to approach an EU Cohesion Policy story in a multimedia format</p>
Description	<p>Module 13 is about training journalism students to ‘sell’ stories tackling EU Cohesion Policy matters in their newsrooms, and make them acquainted with best practice cases of marketing strategies and multimedia reporting. Marketing story ideas in the best way possible is a crucial skill for journalism students. The core objective of this module is to introduce students to the basic steps to pitch a story about EU Cohesion Policy in terms of perspective, presentation and format and to think of the most effective marketing strategies to achieve audience engagement. To this end, making the story matter to people is what this module is all about.</p> <p><b>What are you going to learn?</b> The module will start with an introduction to the basic steps to ‘sell’ a story effectively. You will learn that every story should find its audience and be relevant to people. We will share with you some interesting tips on ‘selling’ a story, as well as some journalistic strategies to market ideas for possible stories. Moreover, you will be introduced to storyboarding for a multimedia project that means choosing which sources (audio, video, geo satellites etc.) fit best with what you want to say.</p> <p><b>How are you going to learn?</b> This module is about knowledge acquisition as well as practice through interactive exercises.</p>
Sequentiality	This module builds upon previously gained knowledge and focuses on practice through interactive exercises.

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## Glossary

MOOC	Massive Open Online Course
Pitch	A media pitch is a short communication, suggesting a news story to a journalist or editor at a publication, news site, radio station or broadcast network.
Storyboard	A storyboard is made up of a chronological series of images, with accompanying notes. A storyboard communicates a creator's vision. It sets out how you want the final piece to flow.



## About this module

When was the last time you read about EU Cohesion Policy in the news? Was it an interesting story or a boring, boring, boring one? Unfortunately reports on EU Cohesion Policy do not reach a large audience, as a big part of the story about EU Cohesion Policy tends to stay below the radar of public attention.

There is too little public communication and Europe is continuously diagnosed to suffer from a severe democratic deficit (Follesdal & Hix, 2006; Hooghe & Marks, 2009; Eisele, 2017). European people tend to interpret EU-funded projects as local-regional.



Figure 178: About this module: Source: Pixabay

Mendez and Bachtler (2016:5) argue that “research on the role of EU Cohesion policy in promoting European identity remains uncharted academic terrain”, while the key policy conclusion, at which several studies arrive, is that EU investments need to be much more sensitive to local people’s concerns, attitudes, and grievances if they are to be successful in bringing communities together.

To tackle these issues in Module 13, we will think about innovative ways to approach EU Cohesion Policy, trying to ‘sell’ our stories and meeting at the same time the needs of our audiences. This module offers useful information on the basics of marketing story ideas and suggests innovative multimedia formats that can inspire you.

## Introduction to the story of this module



Figure 179: Imagine this is your story, Source: Pixabay

Imagine that this is your story: Socrates is a local journalist who covers European Affairs. He is not Brussels based, but he visits the capital city of the EU, once a month, for talking with sources, strengthening his network and enjoying the vibes in the ‘heart’ of Europe.

During his last visit, when attending a press conference for the EU Week of Regions and Cities, he received important information regarding the dubious management of EU funding in the region, from where he comes.

Now, he thinks of how to organise the story he is currently working on in a multimedia format and ‘sell’ it to a network of local media with which he cooperates.

This module will take you on a journey to realise this goal: ‘Selling’ the European story by building at the same time on the advantages of multimedia storytelling.

## How to ‘sell’ an EU Cohesion Policy story

Daily, as journalists, you must reach readers on multiple platforms in various formats. At the same time, you must promote and ‘sell’ your story ideas to the editors-in-chief and managing directors.

That means that you must market your story ideas on two different levels:

- Audience needs level—Reception oriented (What people want to know?)
- Newsroom hierarchy level—Production oriented (What do the editors think?)



Figure 180: How to 'sell' an EU Cohesion Policy story;  
Source: Pixabay

So, before starting your marketing expedition you need to carefully reflect on: Why should someone want to read my story? How will I convince the editor-in-chief that my story is interesting?

For example, how can the story that Socrates has in mind about how EU funds are spent, attract the interest of people in his region?

Finding an interesting perspective is of key importance. The foundation of every story is relevance. Audiences consume news, which is relevant for them at the local, national and international level (Schröder, 2019).

Therefore, Socrates first needs to think about how to link the subject to the needs of his target audience. His task is to grab the reader’s attention by making the story interesting. And then he needs to make sure that his editor thinks the same.

Let’s take one step at a time. Our first step will be finding out more about how audiences consume news.

### **Boring Brussels? Not anymore: Understanding the audience**

Daily journalism produced in the 19th and 20th centuries was a one-way conversation of privileged information gleaned from political elites, unconcerned with “audience engagement”. But now it is much different as the “people formerly known as the audience”, once on the receiving end of media communication systems, wish to inform people of their existence and of a swing in power that goes with the platform shift (Rosen, 2012).

Journalists historically thought little about what their audiences wanted from news. Instead, they tended to report on topics that appealed to them and their editors, as well as those that had been covered by their competitors (Nelson, 2019).

So, in order to make news about EU Cohesion Policy attractive, we should make people care about it, as well as to think about the possible consequences in their own lives. Research from multiple disciplines tells us that people engage and consume information that affirms their identities and aligns with their deeply held values. News audiences make their own meanings. The same news story can be read by people in multiple ways.

Audience engagement is the experience that users have with media content. The term has been used to describe everything from the way audiences respond to published news to the way they participate in the production of that news.

Journalists need to be more aware of how they can offer not only a diverse collection of voices, but also include more local voices and aim at specific groups of people.

According to [Schröder \(2019\)](#) relevance and shareability are paramount drivers of news consumption. He further identifies four profiles that reflect peoples' taste for news and information.

**Exercise 1 - Read Schröder's report and help Socrates decide which of the four profiles he should be aiming at**

1. Repertoire 1: People with political and civic interest in news
2. Repertoire 2: People with a social-humanitarian interest in news
3. Repertoire 3: People with a cultural interest in news
4. Repertoire 4: People who seek (political) in-depth stories

Use a maximum of 20 minutes to work on this exercise. The solution to this exercise can be found at the very end of this module.

**Key ideas for 'selling' a story**

Socrates came up with a few ideas that you might find helpful:

He remembered that during a media trip a few weeks ago, organised by DG REGIO, there was this workshop about the [Open Data Portal](#). Why not, then, work with the Open Data Platform and write a story about what kind of projects are being funded, what are the absorption rates of the structural funds and probably spot some dubious EU funded projects? This could also give him the opportunity to compare the situation in his region to other regions. Open data is a tremendous resource that simultaneously strengthens public integrity and accountability between policy makers and citizens.

The EU Open Data Platform provides free access to EU datasets that can be freely reused.

**Best practice example**

You can find [here](#) an example of an interactive data story on slow Internet speeds and unspent cohesion funds. This topic could spark the interest of younger Europeans who need high speed Internet.

We are a storytelling species. If Homo Sapiens is the wise person, then Homo Narrans is the storytelling human. Personalised stories are a powerful tool, particularly when a topic is complex or unfamiliar. A growing number of scholars suggest that emotional storytelling is a critical tool to engage audiences, Socrates remembers reading in an article on this topic by Papacharissi and de

Fatima Oliveira (2012). Also, when he looks for insights on how to draw people into the story, Socrates consults Al Tompkins's "Aim for the heart: Write, Shoot, Report and Produce for TV and Multimedia".

In the data story about the unspent cohesion funds on Internet speed, you read that Greece managed to spend only 34% of the total allocated funds. Whom does this affect and to whom you should talk?

### **Exercise 2 – Trying to reach your target audience**

Think first about relevance and then decide who is your target audience. Perhaps you need to include young peoples' voices or maybe you can use a web form or do outreach in social media to see what people would like you to ask your sources. Make a list of who you are trying to reach and how you can reach them.

Use a maximum of 10 minutes to work on this exercise.

Finally there is the issue of headlines. Socrates' advice is to have clear and specific headlines, telling the reader what the story is about, and being interesting enough to draw them into reading the article.

### **Exercise 3 - Does your headline keep readers engaged?**

Read [Thompson \(2011\)](#) and think of how the following questions could help you while writing a headline:

- Is the headline accurate?
- Does it work out of context?
- How compelling a promise does it make?
- How easy is it to parse?
- Could it benefit from including a number?
- Are all the words necessary?
- Does it obey the Proper Noun Rule?
- Would it work better as an explanatory headline?
- Does it focus on events or implications?

Then write multiple variations of a headline for the story on slow Internet speeds and unspent cohesion funds by the [European Data Journalism Network](#).

Use a maximum of 10 minutes to work on this exercise.

## Writing a successful media pitch: Less is more, but not that much less

Now, it's time to 'sell' the story to the editor. This section is about the basics of writing a successful media pitch, including how to write a strong subject line, how to format your pitch effectively and what to include.

A good media pitch is like a good CV. It can take you to places you have not imagined before. The job of a pitch is to make your story stand out from the crowd. It is a brief description, which aims to convince an editor to commission the piece. There you explain what your story is about, what makes it right for the person you are pitching it to, and why it will sell.



Figure 181: Writing a successful media pitch; Source: Pixabay

A successful pitch includes:

- A clear subject line
- A hook for the first line
- A short paragraph describing your story by focusing on key elements
- Reasons it should be published
- Your credentials and background

And some extra tips:

- When writing a media pitch keep in mind that it's all about being upfront and clear.
- Think like a true journalist. In your pitch you should be precise and explain the six w's (who, what, when, where, why and how) of your story, along with creating news value by explaining why the story is interesting to that particular journalist's audience.



Figure 182: The endless value of the 6 W-questions; Source: Pixabay

- The inverted news pyramid style works perfectly when writing a pitch. According to [Muck Rack](#), the State of Journalism 2020 study found that fewer than 33% of journalists surveyed wanted to receive pitches under three sentences in length, with another 61% preferred to cap those pitches at three paragraphs. Less is more when it comes to pitching. But not that much less. This insight tells us that in two to three paragraphs you can include the right amount of information beginning with the most newsworthy info, and then in order include important details and close with other general and background info.

For more, [watch the video](#) with editors's top tips on pitching by the BBC Academy.



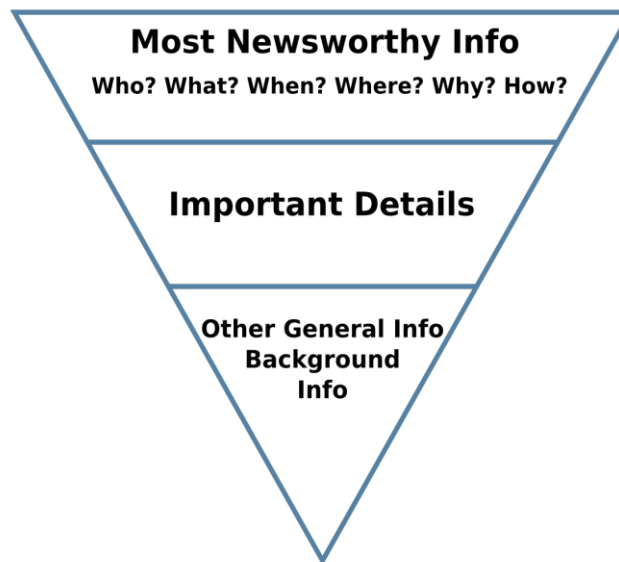


Figure 183: The Inverted News Pyramid; Source: COPE-production

## Simulate a written pitch

### Exercise 4:

Cookie, Socrates' dog, playfully tore up the letter he wrote to the editor, in which he explained why his story is of interest to their audience. You must help him put it in the right order.

Use a maximum of 10 minutes to work on this exercise. The solution to this exercise can be found at the very end of this module

- a) On the sidelines of the press conference of the European Week of Regions and Cities I attended recently, I received important information regarding a story I am following on the Managing Authority of Region X and specifically on a particular kind of recycling investment, financed under the Regional Operational Program.
- b) My 25 years of expertise in covering European Affairs and the network of people I have built, give me the confidence that I can provide you with a good story on the spending of EU funds.
- c) Socrates Thoukididous Journalist, [socrates@thoukididous.com](mailto:socrates@thoukididous.com)  
Attached you will find relevant published work: links provided.
- d) Please let me know if you're interested in the piece. Thank you for your time and consideration. I hope to hear from you soon.
- e) To: Andromeda Papageorgiou  
Subject: PITCH: EU freezes funding on recycling investments in Region X  
Dear Editor,
- f) I'd like to write a piece about this story for your publication. I feel it would contribute valuable information to your readers while emphasising your clear focus on investigative journalism.
- g) A few days ago, I obtained access to a document, according to which the Commission withdraws expenditure from pending reimbursement requests on this particular kind of recycling investment, namely the "recycling houses". The Commission expresses doubts and wishes to ensure that EU funding is at all times implemented in a strategic, impactful, and cost-efficient manner.

## The Journalists' Corner: Tips on selling strategies and on-line marketing

Socrates asks Thodoris Chondrogiannos, a young, yet already well known Greek investigative journalist for more advice on 'selling' his story. Thodoris's work involves among others the 'failed' EU and national policies on overfishing (Chondrogiannos & Loukakos, 2020), as well as a story on the dubious management of EU Cohesion Policy funds by Greek authorities (Reporters United, European Commission "freezes" funding on the "recycling houses", April, 2023). He also acts as audience editor for Reporters United, the medium he is working for.



Figure 184: Thodoris Chondrogiannos, Greek Investigative Reporter

Let's find out what Thodoris has to say:

#Explain, explain, explain

The first step is to make our story relevant to our audience. Why should people care about it? To put it simply, how does a story on EU policies affect peoples' lives and their everyday routine? Frequently we alienate large parts of our audience by focusing only on certain aspects of a story that may be too technical or vague. Other times, we don't provide explanations on the cause-effect relationships. So, we should first explain in the simplest way why we tell people what we tell them. The core task is about making sure our work matters not only to our audience but also to the publishers who oversee journalists' work, and engagement helps ensure that the work finds the public support it needs to endure.

#Put public interest first

When pitching a story, I always try to highlight why an issue is important in terms of public interest. The second is to ground it in journalistic terms and to make it visually appealing. For example, in "Silent Fish" I tried to highlight that we are going to have interesting stories of fishermen and their families, along with nice pictures of Mediterranean Sea coastal areas.

#Keep it simple

Social media plays a very important role in promoting your story. What matters most is to say what you want in the clearest possible way. Ask yourself first: what do I want to say? Then try to produce something clear, short and direct.

✕ One suggestion is to promote the story in Twitter threads for expanding on what's happening, keeping the facts straight and up-to-date as the story develops or bringing an old story back to life. A Twitter Thread is a simple way of doing this: just hit reply to your own Tweet and start composing. By using Threads, you add more context and updates in real-time. Our Twitter Threads are usually 10 Tweets involving text, photos and documents. Here's [an example](#) from Reporters United.

📷 Another suggestion is to use Instagram to visualise the stories and turn text into images. Instagram relies on photos and videos. Social media is largely visual, so once you've got the text ready, it is onto graphics, images and videos.



## Developing your own strategy

You know by now that it's very important to engage the audience, in other words to get them interested in what the story has to offer and give them a reason for consuming it. At the same time, you should be careful and get the balance right between what the public wants and what journalism is about in terms of professionalism and journalistic norms.

Therefore, you must plan a strategy addressing the two set of requirements previously identified (see 2.1) as audience and news production needs:

How can you find what people would like to know about EU Cohesion Policy?

- By asking them, e.g., get them to vote by using polls
- By crowdsourcing, e.g., asking them to contribute to a task online by sharing their knowledge/expertise
- By collecting stories from them
- Or by getting feedback from them on an ongoing story

How to write for impact on EU Cohesion Policy?

The following can help you answer this question:

- Pursue information that the public has a right to know (how EU money is spent, how decisions are being made etc.)
- Widen awareness of those who live outside and beyond Brussels (i.e. not the EU's elite). Including peoples' voices in an impactful way is an important parameter, yet maintaining the journalists' role of gatekeeper is crucial. Read [here](#) the report on Citizens' dialogues and participation in EU decision-making.
- Create inventive and relevant ways to communicate your story (e.g., a digital newsletter). A couple of years ago, Thodoris Chondrogiannos launched his newsletter "The Prodigal Reporter" hosted by Substack. A newsletter has a specific type of content, which is better for audience engagement. Read [here](#) for more on newsletters and epistolarity in digital media.

Now Socrates is ready to plan his strategy. But first let's recap.

## Exercise 5 - Summary

Choose the correct statement

1. To develop a 'selling' strategy, one needs to look at:
  - a. Audience needs
  - b. News production needs
  - c. Both of the above
  
2. Crowdsourcing is about:
  - a. Raising money to finance projects
  - b. The practice of turning to a body of people to obtain needed knowledge
  - c. Giving voice to people
  
3. Which of the following is not a method to engage the audience?
  - a. Polls
  - b. Crowdsourcing
  - c. Crowdfunding
  
4. A newsletter
  - a. Is a printed or electronic report with the main purpose to cover general news
  - b. Is a printed or electronic report containing news of interest to a special group
  - c. Has the same function as a blog

You have 10 minutes. The solution to this exercise can be found at the very end of this module.

## Going multimedia



Figure 185: Going multimedia; Source: Pixabay

Media consumers have long been active “producers” (Bruns, 2008) who not only contribute information and post commentaries but also produce and distribute content (Hermida et al., 2011).

Adopting journalistic output to digital platforms and developing mobile news publishing (Westlund, 2013), as well as altering reporting formats by producing more interactive and visually enhanced content (Aitamurto & Lewis, 2013) became key strategies for journalists and media organisations.

Although Socrates is not a digital native, he knows that he needs to address his stories to younger audiences who are increasingly accessing the news via platforms. What’s more, Generation Z has never known what it’s like not to have round-the-clock access to the internet. How can Socrates meet their needs? By going multimedia. *Interactivity*, and *nonlinearity* are the keywords he has in mind.

Interactivity means giving the reader both input and control in a story. By making the story nonlinear, you’ve introduced an element of interactivity, because the user can choose which elements of a story to read or view and in which order.

What is a multimedia story?

A multimedia story is a combination of text, still photographs, video clips, audio, graphics and interactivity presented on a web site in a nonlinear format.

Nonlinear means that rather than reading a rigidly structured single narrative, the user chooses how to navigate through the elements of a story. The key is using the media form—video, audio, photos, text, animation—that will present a segment of a story in the most compelling and informative way. But how can we decide which media form tells which part of the story?

The answer is storyboarding. Storyboarding is a way to tell narratives and engage people.

### **Multimedia storyboarding**

Storyboards are made of snapshots. The snapshots tell a story. A storyboard is a way for journalists to communicate ideas and make them tangible. It is about organising a story and a list of its contents.

A storyboard helps you:

- Organise your story
- Choose what medium to use for each part of the story

#### **Exercise 6:**

In the storyboard you can divide the contents of the story among the different types of media forms. Read these instructions coming from [Berkeley Advanced Media Institute](#) and then answer the following questions:

1. When to use video?
2. When to use photos?
3. Does the audio work best with video, or will it be combined with still photos?
4. What part of the story works best in graphics?
5. Does the story need a map?
6. What part of the story belongs in text?
7. Make sure the information in each medium is complementary, not redundant.

You can a guideline sheet that will help you consider all relevant aspects and estimate your performance at the end in the Appendix of this Module.

You have 15 minutes.

Watch the [Hollow Documentary](#) for inspiration.

## Developing low fidelity prototypes

Now Socrates is ready to design his storyboard for the multimedia story that will be about how EU funds are being spent. It will be easier for him to work with low fidelity prototypes which are quicker to create. Low fidelity prototypes are often paper-based and can range from a series of hand-drawn mock-ups to printouts. Their numbering starts from the top.

Make sure the information in each medium is complementary, not redundant. A little overlap among the different media is okay. It's also useful to have some overlap among the story's nonlinear parts, as an invite to readers to explore the other parts of the story. But try to match up each element of a story with the medium that best conveys it. Be aware that each medium may be suitable for use in more than one element of the story.

### Exercise 7 - Choose the right medium for each part of the story

Match the part of the story with the right medium

1. Provide data on the location of EU funded projects
2. Present an interview from an expert
3. Compare data on the allocation of EU funds
4. Describe the process of the monitoring of the Regional Operational Programs

- a) Map
- b) Text
- c) Video
- d) Graphs

You have 10 minutes. The solution to this exercise can be found at the very end of this module.

## Final Exercise

### Exercise 8:

Before moving on to Module 14 there is one more helpful activity you can do. Now that you have a better grasp of what marketing story ideas, pitching and storyboarding is all about, it's time to test your acquired knowledge. The test consists of a Quiz with multiple choice questions and helps you assess your understanding of all the concepts contained in this module.

Quiz of 15 questions. For each question choose the one answer that is suitable. The solution to this exercise can be found at the very end of this module.

1. Can a successful pitch
  - a. Be sent via a mass email to a large group of recipients?
  - b. Be personalised?
  - c. Both a. and b. work.
  - d. Neither a. nor b. works.
2. What is pitching about?
  - a. Persuading
  - b. Challenging
  - c. Impressing
  - d. Informing
3. Should your pitch contain a clickbait headline?
  - a. Yes
  - b. No
  - c. It depends on who your recipient is
4. What are you pitching?
  - a. A story
  - b. A topic
  - c. Your story's protagonist
  - d. Yourself
5. What is a visual organiser—typically a series of illustrations displayed in sequence for the purpose of pre-visualizing a video, web-based training, or interactive media sequence—called?
  - a. Animation

- b. Storyboard
  - c. Cartoon movie
  - d. Movie
6. What would you use video in your story for:
- a. Stirring emotions
  - b. Action
  - c. Telling a story
  - d. Providing background
7. With reference to these multimedia elements, which is the odd-one out?
- a. Video
  - b. Audio
  - c. Voice script
  - d. Graphics
8. Which one of the following is wrong for creating a storyboard?
- a. Use a pencil in drawing
  - b. Your drawing does not need to be perfect
  - c. Use a tool/software
  - d. Numbering scenes should start from down to up
9. Which one of the following statements is problematic?
- a. In a pitch you should emphasise the responsibility we have as journalists to uncover the truth and to tell authentic stories.
  - b. In a pitch you should point out how in-depth personal testimonies and interesting new angles make for compelling stories that audiences may not have encountered before.
  - c. In a pitch you should make sure any important sources have already agreed to work with you before you make your pitch.
  - d. You can pitch the same story to multiple outlets at the same time
10. Which of the following statements is not valid?
- a. Photos are for action.
  - b. Photos stir emotions.
  - c. Photos immerse the reader in the location of the story.

d. Photos create a particular mood.

11. Can graphics be a story's primary medium?

- a. Yes
- b. No

12. Which of the following sentences is not valid?

- a. Interactivity means giving the reader both input and control in a story.
- b. By making a story nonlinear, you've introduced an element of interactivity.
- c. Interactivity is about hyperlinking.
- d. Multimedia is nonlinear.

13. Which of the following cannot be considered a driver of news consumption?

- a. Shareability
- b. Relevance
- c. Cultural alienation
- d. Interactivity

14. Can news stories about the EU Cohesion Policy be developed in a multimedia format:

- a. Yes
- b. No
- c. It depends on the available sources.

15. Can a great source for stories about the EU Cohesion Policy be?

- a. Open Data
- b. Testimonials
- c. Interviews
- d. All of the above

You have maximum 15min.

## Conclusion

Congratulations! You have successfully negotiated your way through the content of Module 13. This module has helped you to gain a better idea of how to market your story ideas and guided you through the basic steps of pitching your story in terms of angle, presentation, and format. You know by now how important it is to 'sell' your story effectively, as well as how to choose the sources that fit best with what you want to say. In Module 14 you will be able to apply these skills for a real pitch!



## Suggested Literature

We would also like to recommend further literature to you:

Academic literature:

Nelson, J. (2019, December 17). How do audiences really ‘engage’ with news? Columbia Journalism Review. [https://www.cjr.org/tow\\_center/audience-engagement-journalism.php](https://www.cjr.org/tow_center/audience-engagement-journalism.php)

Papacharissi, Z. & de Fatima Oliveira, M. (2012). Affective news and networked publics: The rhythms of news storytelling on Egypt. *Journal of communication*, 62(2), 266-282. [https://zizi.people.uic.edu/Site/Research\\_files/PapacharissiOliveiraJOCEgypt.pdf](https://zizi.people.uic.edu/Site/Research_files/PapacharissiOliveiraJOCEgypt.pdf)

Rosen, J. (2020). The People Formerly Known as the Audience. In New York University Press (pp. 13-16). <https://doi.org/10.18574/nyu/9780814763025.003.0005>

Tompkins, A (2017). Aim for the Heart: Write, Shoot, Report and Produce for TV and Multimedia. Cq Press. [https://www.youtube.com/watch?v=gQ3st0h\\_oWk](https://www.youtube.com/watch?v=gQ3st0h_oWk)

Journalistic contribution:

BBC Academy. (2021, January 19). Pitching – Editors’ top tips: BBC Academy. YouTube [https://www.youtube.com/watch?v=j5u\\_5dFVRoA](https://www.youtube.com/watch?v=j5u_5dFVRoA)

Thompson, M. (2011, August 1). 10 questions to help you write better headlines. Poynter. <https://www.poynter.org/reporting-editing/2011/10-questions-to-help-you-write-better-headlines/>

Berkeley Advanced Media Institute. (2020, December 8). Multimedia Storytelling: Learn Secrets From Experts. UC Berkeley AMI. <https://multimedia.journalism.berkeley.edu/tutorials/starttofinish/>

How To Write A Media Pitch: Examples & Best Practices. Muck Rack. (n.d.). Muck Rack. <https://muckrack.com/media-pitching-guide#section-write>

Schrøder, K. C. (2020, May 20). What Do News Readers Really Want to Read About? How Relevance Works for News Audiences – Reuters Institute Digital News Report. Reuters Institute Digital News Report. <https://www.digitalnewsreport.org/publications/2019/news-readers-really-want-read-relevance-works-news-audiences/>

If you have any questions or suggestions, please feel free to contact the authors of the course.

The module has been written and developed by Associate Professor Dr. Ioanna Kostarella and Professor Dr. Andreas Veglis, both from the Department of Journalism and Mass Communications at the Aristotle University of Thessaloniki.

**Solutions for Module 13:**

**Exercise 1:**

Correct answer: Repertoire 1: People with political and civic interest in news

**Exercise 4:**

e – a – g – f – b – d – c

**Exercise 5:**

1-c; 2-b, 3-c, 4-b

**Exercise 7:**

1 – a; 2 – b; 3 – d; 4 - b

**Exercise 8:**

1-b, 2-a, 3-b, 4-a, 5-b, 6-b, 7-c, 8-d, 9-d, 10-a, 11-a, 12-c, 13-c, 14-c, 15-d

## Appendix Module 13:

Guidelines for multimedia storyboarding

**When to use video?** Video is for action, to take a reader to a place central to the story, or to hear and see a person central to the story.

**When to use photos?** Photos are stirring emotions and create a particular mood. Panorama or 360-degree photos, especially combined with audio, also immerse a reader in the location of the story.

**Does the audio work best with video, or will it be combined with still photos?** Good audio with video is critical. Bad audio makes video seem worse than it is and detracts from the drama of still photos. Good audio makes still photos and video seem more intense and real. Avoid using audio alone.

**What part of the story works best in graphics?** Animated graphics show how things work. Graphics go where cameras can't go, into human cells or millions of miles into space. Sometimes graphics can be a story's primary medium, with print, still photos and video in supporting roles.

**Does the story need a map?** Is the map a location map, or layered with other information? GIS (geographic information systems) and satellite imaging are important tools for reporters. Interactive GIS can personalize a story in a way impossible with text by letting readers pinpoint things in their own cities or neighborhoods – such as crime or meth labs or liquor stores or licensed gun dealers.

**What part of the story belongs in text?** Text can be used to describe the history of a story (sometimes in combination with photos); to describe a process (sometimes in combination with graphics), or to provide first-person accounts of an event. Often, text is what's left over when you can't convey the information with photos, video, audio or graphics.

(Berkeley Advanced Media Institute

<https://multimedia.journalism.berkeley.edu/tutorials/starttofinish/>).

# Module 14 – Project Management

## Basic Information

Module number	14
Module title	Project Management
Duration/study load	8 hours
Keywords	project management, sales strategies, timetable, budget concept, risk assessment plan, negotiation, pitch, calculate, planning
Learning outcomes	<p>At the end of the module, students should...</p> <ul style="list-style-type: none"> <li>• recognize the relevance of planning and calculating the costs of EU Cohesion Policy stories</li> <li>• be able to advance planning reporting about the EU CP to accomplish deadlines</li> <li>• be able to respond to challenging tasks during the planning and production of EU Cohesion Policy stories</li> <li>• be able to find diverse solutions for the same project planning problem</li> <li>• be able to develop a network of multiple sources for planning and negotiation strategies</li> </ul>
Description	<p>Module 14 is the combination of the competences developed in previous modules.</p> <p><b>What is it about?</b> While this Module focuses on how to pitch and negotiate conditions for stories about EU Cohesion Policy , it is also intended to strengthen the students' competence to plan and realise EU Cohesion Policy stories. So, the Module includes working on a timetable, budget concept and risk assessment plan.</p> <p><b>What are you going to learn?</b> Students will learn how to plan a journalistic project about EU Cohesion Policy. They will also be introduced to all the steps of project management - including sales strategies (on the market of journalistic outputs), timetable, budget concept, risk assessment plan and negotiation</p> <p><b>How are you going to learn?</b> It is an introduction into journalistic project management, which is supplemented by short practical exercises. The Module is enriched by videos from experienced EU journalists and combines journalistic training with deeper insights into covering EU topics shared by other experienced journalists.</p>
Sequentiality	<p>Module 14 is interlinked with all the previous Modules, particularly taking into consideration Modules 11, 12 and 13. Module 14 summarises and extends the competences developed by students in the preceding Modules.</p>

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## Glossary

Collaborative Reporting	Working with colleagues, instead of pursuing the whole story by yourself, as an individual reporter.
Gantt Chart	Schema of days/weeks/months of your project plan, allowing you to structure your project work along a timeline.
Pitch	Catchy and concise project proposal you develop for the first contact with the newsroom.
Project Budgeting	Calculating expenses needed to realise a story (e.g., travel costs, camera equipment, insurance, office supplies, communication costs, fees, licences, translations, and so on).
Project Timeline	Milestones and deadlines you plan to complete for the project within a specific timeframe.
Risk Assessment Plan	Maps potential problems and hindrances that might occur while pursuing the story.
Task Prioritization	Overview of the steps you envision in realising your story, sorted by relevance.

## Acronyms

EU	European Union
MOOC	Massive Open Online Course

## About Module 14

Congratulations, you have reached the final step of your MOOC.

In the preceding 13 modules, you have learned a lot about EU Cohesion Policy and ways to address it in catching and diverse journalistic approaches.

The goal of this learning process culminates in the possibility of launching catchy ideas through a pitch based on storytelling techniques. Because sometimes stories about EU Cohesion Policy don't generate much interest in either newsrooms or the audience (as you already know from Module 13).



Figure 186: About module 14 - This is the final step of the MOOC; Source: Amazon Web Services

Module 14 is about the development of a story on EU Cohesion Policy – from the first idea and the conceptualization to the negotiations about payment and conditions. We have both freelancing journalists and young colleagues with a permanent contract in a newsroom in mind – as both might experience that even good ideas fail due to a lack of planning or poor preparation.

Therefore, this Module will equip you with strategies to plan and calculate stories about EU Cohesion Policy. Moreover, it provides you with insights into how successful journalists plan and sell their stories about EU topics, and it will help you to build lasting relations in the news business of your country.

## Module 14 objectives



Figure 187: Module 14 objectives - Strengthening the students' competence to plan, negotiate and realise stories; Source: Pixabay

On the one hand, this Module intends to elaborate further on the topics already addressed in Module 13, which has introduced you to ideas of methods to raise editors' and newsrooms' interest in your story idea. You will now learn more about the various ways to pitch and negotiate conditions. On the other hand, this Module also seeks to achieve new learning outcomes by strengthening the students' competence to plan and realise stories – and apply this knowledge to stories about Cohesion Policy.

## Planning ahead

As you already know from Module 13: Planning your story is relevant. One part of planning is to think about your audience. To refresh your knowledge of what that means, listen to the experienced journalist Michael Grytz sharing with you his experience - in this and the following videos!



Figure 188: Planning ahead - Planning a story is relevant. But what is important in the planning process?; Source: Pixabay



**Watch now:** [Introduction of Michael Grytz, German Brussel-based journalist](#)



*Figure 189: [Introduction of Michael Grytz, German Brussel-based journalist](#);  
Source: TU Dortmund University/ own production*

**Watch now:** [Insights about planning a story for a target audience from Michael Grytz](#)



*Figure 190: [Insights about planning a story for a target audience from Michael Grytz](#);  
Source: TU Dortmund University/ own production*

But there is more to planning than just a good idea, a prior meticulous journalistic investigation for a pitch, or a well formulated letter to the editor. It is important to have a plan for all steps, a well-designed timetable, a budget concept, and a risk assessment plan so that the project succeeds and reaches a large audience at the end. You must be a project manager. [Robin Kwong](#), the brain behind special projects at the *Financial Times* and *The Wall Street Journal*, has published a blueprint for planning, executing and wrapping-up new ideas in newsrooms. For more in-depth insights, we strongly recommend reading this guide!

The starting point for the entire process is a project plan. Robin argues in his guide: “Good planning, even if it’s more work initially, is a force multiplier.” So, good planning significantly enhances chances of success.

### **How do you create a project plan?**

[Ben Lutkevich](#), a technical features writer, explains project planning includes three major elements. Journalists have to consider the stakeholders for their story, be aware of the reporting tasks that need to be done and develop a schedule for the reporting process.

1. Define the **stakeholders**: These are the protagonists of your story as well as your sources and your potential audiences - but also think of the team members involved in producing your story. Each stakeholder's role should be clearly defined. Some actors will fulfil multiple roles. For example, people from EU institutions or think tanks can be your sources and your audience at the same time.
2. Prioritise **tasks**. To realise your story, many ensuing steps are necessary. List these tasks and prioritise them based on importance and interdependencies. A Gantt chart can be helpful.
3. Create **a schedule**. Establish a timeline that also realistically assesses the resources you have at your hand for all the tasks.

All three elements should be included in your journalistic project plan.

### **Technical Tools**

In the digital world, there is ample availability of excellent project planning and project management software, which facilitates the project planning process. These tools can even support collaboration with other journalists. They have intuitive user interfaces and provide built-in time tracking and invoicing. You can find some of them in [Ben Lutkevich’s article](#). For example, [Kosmos](#) or [ClickUp's Journalistic Project Proposal Template](#) are great tools. They help you to clearly outline your project's objectives and target your audience. They also assist you to find a unique angle and to break down your research plan, develop an interview schedule, and think about data collection methods. You can create a detailed timeline with milestones and deadlines to keep you on track, collaborate with your team and receive feedback in real-time.

In addition, ClickUp's Journalistic Project Proposal Template guides you through the six important steps of journalistic project planning:

1. **Define your project idea**

Start by clearly articulating your project idea. What is the story you want to tell? What is its significance? Why is it important to pursue this project? Be concise and compelling in describing your idea to capture your reader's attention.

## 2. **Conduct research**

Before diving into the proposal, conduct thorough research to gather supporting evidence, statistics, and background information. This will help strengthen your case and demonstrate that you have enough evidence and personal testimonies for your project.

## 3. **Outline your approach**

In this section, outline your investigative approach and methodology. Explain the steps you will take to gather information, conduct interviews, and verify facts. Provide a timeline that shows how you plan to complete the project within a specific timeframe.

## 4. **Identify potential sources and experts**

Highlight the key sources and experts you plan to reach out to for interviews, quotes, or background information. Include their credentials and explain why their perspectives are crucial to the project.

## 5. **Develop a budget**

Estimate the costs associated with your project, including travel expenses, background materials, equipment rentals, and any other relevant expenses. Present a clear and realistic budget that demonstrates your understanding of the financial aspects of the project.

## 6. **Craft a compelling conclusion**

End your proposal with a strong conclusion that summarises the key points of your project and highlights its potential impact. Emphasise why your project deserves support and how it aligns with the values and goals of the organisation or funders you are approaching.

## **Tasks and priorities**



*Figure 191: Tasks and priorities - An important step is to define tasks and prioritise in a timeline;  
Source: Pixabay*

You have already taken Steps 1 and 2 – defining the project idea and conducting research - in Module 13. Now it's time to take Step 3. That means: Define the tasks and prioritise them in a timeline. Your major task is research. You have already learned about investigating Cohesion Policy in Module 11. So, you are aware where and how to gather information about the EU Cohesion Policy quickly and comprehensively, and effectively select the essential information. Listen to journalist Michael Grytz to get exciting tips on how to deal with information regarding EU Cohesion Policy.

**Watch now:** [Insights about investigation for journalistic reports on the subject of EU cohesion policy from Michael Grytz](#)



Figure 192: [Insights about investigation for journalistic reports on the subject of EU cohesion policy from Michael Grytz](#); Source: TU Dortmund University/ own production

## Exemplary steps on the way to your story

### Exercise 1:

To remind yourself of the tasks waiting for you, you will find a few examples that need to be put in the correct sequence. Use a maximum of 10 minutes to work on this exercise. The solution to this exercise can be found at the very end of this module.

- a. check information for accuracy
- b. arrange, prepare, and conduct interviews to deepen your level of information and make your story lively
- c. outline your story idea, your audience, and your unique angle
- d. get accredited for relevant events
- e. research general information
- f. find a second source for statements, because journalists should have at least two independent sources - if their information deviates even in details, this should be made transparent
- g. evaluate information
- h. participate in press conferences or other press events to gather more general and special information
- i. identify key sources and experts
- j. proof-reading and re-editing
- k. production: write the story for print or radio, and/or edit the material, gathered before, for radio/TV

These are exemplary steps on the way to your story - additional measures which are even more detailed and elaborate might be necessary depending on the medium chosen. The topic and context of your research also play a role: For a television report you must think about filming conditions (weather, light, etc.). If you plan to have pictures for your story, you must coordinate your work with a photographer or camera team. Information is not always easily available, so you must get access to certain archives, etc.

## Evidence and proof

Evidence and proof are especially important – as you already know, having completed Module 11. There are some key questions, which you should ask yourself. They are listed in [an article about planning an investigation](#) written by journalist and researcher Mathew Charles:

- What will count as complete evidence?
- What will count as reliable evidence? (How many sources are needed? Which types of sources?)
- What could invalidate/disprove my evidence?
- Which pieces of evidence will require the most careful and detailed checking?

It is important to think about these issues before you start the actual research, so that you can allow enough time to ensure all the facts are correct.

Helpful suggestions and ideas for your own projects can be found in the [handbook for pitching development stories!](#)

### Exercise 2:

Do you remember the [intriguing story](#) the Investigate Europe newsroom has produced on cohesion funds for railways in Europe, highlighted in Module 1? Think about the steps the journalist who edited this story might have listed on their plan!

- a. arrange, prepare, and conduct interviews to deepening the information level and make a story lively
- b. identify key sources and experts
- c. production: write the story for print or radio, and/or edit the material, gathered before, for radio/TV
- d. check information for accuracy
- e. outline the story idea, audience, and unique angle
- f. get accredited for relevant events
- g. evaluate information
- h. research general information
- i. participate in press conferences or other press events to gather more general and special information
- j. proof-reading and re-editing
- k. find a second source for statements, because journalists should have at least two independent sources. If there are differences in details, they should be made transparent

Use a maximum of 25 minutes to work on this exercise. The solution to this exercise can be found at the very end of this module.



## Timetable Planning



Figure 193: Timetable planning - Think carefully about which task takes how much time; Source: Pixabay

Once all the tasks have been listed and a rough draft for the steps exists, the phase of detailed planning begins.

Think carefully about which task takes how much time. Work backwards from your deadline to figure out how much time you have, to do everything. Also plan sufficient buffer time for unexpected events.

For an even deeper understanding of timetable planning, listen to journalist Michael Grytz sharing with you insights from prior work experience!

**Watch now:** [Insights about timetable planning from Michael Grytz](#)



Figure 194: [Insights about timetable planning from Michael Grytz](#);  
Source: TU Dortmund University/ own production

## Budgeting

To convince your editors that your story is truly worth being realised, you also need to know how much it will cost. Budgeting is therefore an important aspect – not only to convince the editor, but also for your own finances as, for example, a freelancer. The guide “Negotiation for freelance journalists” from the European Journalism Centre can be very helpful when it comes to understanding the value of your own work. In addition, you have to relate the project costs for your Cohesion Policy story to your average basic costs and income from your journalistic work (more on this at the [International Journalist Network website](#)).



Figure 195: Budgeting Numerous budget elements need to be factored into your project budgeting; Source: Pixabay

More precisely, you must consider three variables in the context of your project finances. 1) Your basic income and expenses as a journalist. 2) The budget plan for your specific project. 3) The negotiation for payment for the specific project (if you work as a freelancer).

While the Level 1 goes beyond the scope of this module, we can train your awareness for Levels 2 and 3. Numerous budget elements need to be factored into your project budgeting.

### Exercise 3:

Please fill in the right words into the blanks from the word options below to get to know more about budget planning. Use a maximum of 10 minutes to work on this exercise. The solution to this exercise can be found at the very end of this module.

Calculating means determining the project costs. Naturally, unforeseen events can suddenly change costs. As a rule, however, all journalists should calculate \_\_\_\_\_ and fees for themselves and the entire production staff.

General costs such as office supplies, telephone costs, e.g., for calls abroad, etc. are also relevant for all journalists. Depending on journalists own language skills, costs for \_\_\_\_\_ could also be added.

In addition, all \_\_\_\_\_, e.g., for music, videos, etc., should be considered, if you produce a multimedia report.

However, a lot of money is always spent for \_\_\_\_\_: Accommodation costs, insurances, flights or fuel costs, cost for car parking and hospitality costs quickly add up to large sums. Naturally, \_\_\_\_\_ costs also come into play: If you need equipment such as a camera, it must be purchased, maintained, and insured.

**Available words:** user licences, indirect, salaries, travelling, translations



## Negotiation

The third aspect is the negotiation of payment/income for the specific project. Regardless of how much you usually get paid, all costs should be covered. It is generally challenging to enter negotiations with a newsroom – especially if you are a newcomer to the field. The guide “[Negotiation for freelance journalists](#)” from the European Journalism Centre provides advice:

1. Be sure that you know exactly how much the newsroom typically pays – the more colleagues you ask the better.
2. Decide in advance whether you would agree with this amount (crucial for cold calls. Usually, newbies get less than the typical fee – but you will not).
3. Have three prices in mind for the negotiation: An anchor price - the first price you will mention in the negotiation, always a little bit higher than the goal price. A goal price - the price you want to achieve. An exit price – equal to or beneath this price you finish the negotiation—politely. But you do leave.
4. Negotiations only start when the newsroom has already accepted your exposé. Think about the right time to negotiate and be the first one to come up with a price tag.

In the context of the negotiation process you should also think about follow-up work, and thus a long-term perspective for your collaboration with the newsroom.

## Risk Assessment Plan



It's not rocket science to create a risk assessment plan, but the way you manage risks can determine the successful realisation of your story. Risks associated with a journalistic project vary from story to story. So, how can you best structure the information you include in your risk assessment plan?

First, brainstorm the risks you must include in your plan. Second, rank the risks. An easy option is to rank risks according to their relevance - for example, their potential impact on your journalistic project. Another option is to organise the risk assessment plan based on the likelihood of each risk occurring. So, be sure about the likelihood and impact of each risk anyway. Finally: Monitor risks throughout the project process.

*Figure 196: Risk assessment plan - Risks associated with a journalistic project vary from story to story. You should structure the information you include in your risk assessment plan; Source: Pixabay*

Michael Grytz knows what challenges can occur in reporting about EU Cohesion Policy. Don't miss watching the video!

**Watch now:** [Insights about challenges when reporting about EU Cohesion Policy from Michael Grytz](#)



*Figure 197: [Insights about challenges when reporting about EU Cohesion Policy from Michael Grytz](#);  
Source: TU Dortmund University/ own production*

[Here](#) you can find further support to develop your own risk assessment plan.

## Collaborative Projects

The first element from [Ben Lutkevich's](#) list – stakeholders – reminds us of the collaborative aspect your project can have: Other journalists can be involved. Working with colleagues – instead of pursuing the entire story on your own, as an individual reporter - can indeed be a challenge. But, if successful, it can also be worth the effort.

The European Journalism Center's "Handbook for Pitching Development Stories" argues that collaborating with people with other skills and knowledge can be highly beneficial. Tina Lee, head of publications and editor-in-chief of the collaborative journalism network [Hostwriter](#), elaborates [in this handbook](#), that you will find an interesting loose end during your research, but it's not in your competence and you don't know where to start with it. Tina Lee advises you to "find someone who does know about that area or field and collaborate." This illustrates why collaboration is such an important "tool" for journalists.



*Figure 198: Collaborative projects - When planning journalistic projects, it makes a difference whether you do everything alone or want to realise collaborative projects. Planning looks completely different for a team than for a "lone fighter"; Source: Pixabay*

You have already been introduced to collaborative reporting in Module 12. Here, you have also learned the seven steps of cross-border collaborative journalism. In addition, you have become familiar with funding sources for cross-border collaborative journalism and selling cross-border stories to editors. Moreover, you have studied several examples of successful cross-border collaboration.

### **Plan collaborative reporting**

Here, we want to focus on planning collaborative reporting. In [Robin Kwong's handbook](#), you get a concise overview over the most relevant aspects:

1. The core team should be as small as possible, because coordination and communication will be harder exponentially with each additional person involved. In almost every project there is a chance to add a key participant later (but keep that in mind when budgeting). It helps if journalists working together have already built a good relationship from previous projects.
2. If all the team members are on your list: Think about what motivates and excites the other journalists with whom you want to work. Share with them your own reasons for being enthusiastic about the story. Moreover, think also about competences and contacts, but also about the time you and your collaborators have.
3. Think about who might be able to attract additional team members.

After preparing an overview of all team members, the next step is to develop and implement a joint research and work plan, which you achieve—not alone—but in collaboration with your team members.

### **It is your turn!**

#### **Exercise 4:**

Now you know all the steps needed to plan a story. So, now it's your turn. Choose a topic and get started. Create a plan for your own reporting!

Use a maximum of 90 minutes to work on this exercise.

Once you have created your plan, you can check on the solutions page at the very end of this module whether you have listed all the relevant aspects

## Conclusion

Congratulations indeed! You've now reached the final step of that hard-working process and know all the relevant aspects to plan and calculate stories about EU Cohesion Policy.

Furthermore, this Module is the completion of the whole MOOC: You have deepened your knowledge about the contents related to journalistic coverage on EU Cohesion Policy. You have become aware of the importance of fact-based reporting. You have got to know best practices in EU coverage and were provided with inspiration. The MOOC has shown you exciting ways to research and cover EU issues. You have trained to collaborate with journalists in other EU countries and you have learned how to successfully plan and pitch new, creative and highly engaging story ideas.



*Figure 199: Conclusion - You've now reached the final step of that hard-working process and know all the relevant aspects to plan and calculate stories about EU Cohesion Policy; Source: Pixabay*

You now have the skills and knowledge needed to report on EU Cohesion Policy issues – critically and comprehensively.  
Well done!

### **For further reading, please see the following sources:**

A handbook for pitching development stories. (n.d.). Freelance Journalism Assembly and European Journalism Centre. <https://ejc.net/resources/a-handbook-for-pitching-development-stories>

Charles, M. (2018). Investigative Journalism II: Planning an Investigation. Medium. <https://medium.com/@headlinexplorer/investigative-journalism-iv-planning-an-investigation-1bf695e56788>

Kwong, R. (2023). Project Management in Newsrooms. Association for Project Management. <https://www.apm.org.uk/resources/find-a-resource/project-management-in-newsrooms/>

## Solutions for Module 14:

### Exercise 1:

c – e – i – d – h – b – g – a – f – k – j

### Exercise 2:

e – h – b – f – i – a – g – d – k – c – j

### Exercise 3:

Calculating means determining the project costs. Naturally, unforeseen events can suddenly change costs. As a rule, however, all journalists should calculate **salaries** and fees for themselves and the entire production staff.

General costs such as office supplies, telephone costs, e.g., for calls abroad, etc. are also relevant for all journalists. Depending on journalists own language skills, costs for **translations** could also be added.

In addition, all **user licences**, e.g., for music, videos, etc., should be considered, if you produce a multimedia report.

However, a lot of money is always spent for **travelling**: Accommodation costs, insurances, flights or fuel costs, cost for car parking and hospitality costs quickly accumulate to add up to large sums. Naturally, **indirect** costs also come into play: If you need equipment such as a camera, it must be purchased, maintained, and insured.

### Exercise 4:

#### Please check!

Here's a list which will help you to verify whether you have thought of every aspect relevant to realise your project!

#### Tasks and priorities

- Did you define your project idea?
- Did you define the stakeholders?
- Did you outline your approach?
- Did you define the way you want to do the fact- check?
- Did you write a list of all important tasks for your journalistic project?
- Did you think about the priorities of the tasks and put the tasks in a sequence (timeline)?

#### Risk assessment plan

- Did you brainstorm the risks?
- Did you rank the risks (likelihood and impact of each risk)?

- Did you plan your physical and emotional limitations realistically?

### **Budget**

- Did you estimate the costs associated with your project, including travel expenses, research materials, equipment rentals, and any other relevant expenses?
- Did you plan a buffer for unexpected costs?
- Did you prepare a clear and realistic budget that demonstrates your understanding of the financial aspects of the project?

### **Negotiation plan**

- Did you find out exactly how much the newsroom typically pays?
- Did you decide whether or not you agree with this fee?
- Did you determine three prices for the negotiation (an anchor price, a goal price, an exit price)?
- Did you choose the right time to negotiate?

### **Collaboration plan**

- Did you think about the size of your team?
- Did you list all the members?
- Did you check their motivations and skills?
- Did you check their time budget for the project?

Please, use a maximum of 45 minutes to check your plan and work on your revision.