

04/2017

**Report on the Final Conference**  
***'Education in Europe: Public Investment,  
Privatisation and Reforms***

*What role do education trade unions play?'*  
**of the ETUCE Project**

***'Investing in Education: Strengthening the  
involvement of teacher trade unions in the  
European Semester on Education and  
Training'***



*This project is supported by the European Commission,  
DG Employment, Social Affairs and Inclusion.*

Egalement disponible en français sous le titre :

*«Rapport de la conférence finale du projet du CSEE: Investir dans l'éducation: Renforcer l'implication des syndicats d'enseignant(e)s dans le Semestre européen pour l'éducation et la formation »*

***Reproduction of all or part of this publication is permitted without authorisation. However, accreditation to ETUCE must be made and copies must be sent to the ETUCE Secretariat***

Published by the European Trade Union Committee for Education - Brussels 2017



This project has been funded with support from the European Commission.

This publication reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

## Table of Contents

<b>Introduction .....</b>	<b>4</b>
<b>Project Description .....</b>	<b>5</b>
<b>Words of Welcome .....</b>	<b>6</b>
<b>Delivering Education and Training reforms across Europe – An ambivalent involvement? ....</b>	<b>7</b>
1. European governance and cooperation: shaping reforms and investment on education and training .....	7
2. Mapping education reforms and trade unions’ involvement on the European Semester on education and training in post-austerity Europe.....	8
<b>Does one strategy fit all? How can education trade unions influence reforms and investment in education and training.....</b>	<b>9</b>
3. One size fits all? Experience from National Education Trade Unions: Objectives, Strategies, Lessons Learnt from the Project Activities and Outcomes .....	9
4. ETUCE Toolbox: Facilitating the Involvement of education trade unions in the European Semester on education and training: Setting Priorities and Choosing the right actions.....	10
<b>Impact of the European Semester on education investment patterns across Europe – A pathway to privatisation? .....</b>	<b>11</b>
5. Unveiling Privatisation Trends and Shaping Education Investment across Europe in Times of Economic Crisis, Survey Results .....	11
6. Turning evidence into political action: the Global Response to Commercialisation and Privatisation in and of Education – Europe in a Global context .....	12
<b>Education as a public good: Rebalancing economic and social priorities in Europe through effective social dialogue .....</b>	<b>13</b>
Exchanges with relevant Social Partners and Stakeholders .....	13
<b>Closing of the Conference, Next steps .....</b>	<b>14</b>

## Introduction

The closing conference of the ETUCE-led project [“Investing in Education: Strengthening the involvement of teacher trade unions in the European Semester on education and training”](#) took place on 30 May 2017, in the International Trade Union House in Brussels. At this occasion, around 90 representatives from education trade unions, education employers’ organisations, representatives from EU Institutions and other education stakeholders discussed investment and education policies at European and national level, most notably in the framework of the European Semester on education and training. The event marked the end of the two-year project led by ETUCE, and gave the opportunity to participants to discuss the outcomes of the project, reflect on the results of the research conducted in this framework, and to hold debates on the future of investment in education in Europe and the role of education trade unions, particularly in regards to the privatisation trends uncovered by the research report.

### The objectives of the Conference were:

- > To provide evidence of the effects of the European Semester on public education financing and education and training systems’ reform patterns, and to determine what education trade unions could do strengthen their involvement in the European Semester on education and training.
- > To present the results of the project. The release of the research conducted by the University of Nottingham on behalf of ETUCE, titled: “Education and Training Policy in the European Semester: public investment, public policy, social dialogue and privatisation patterns across Europe” is the occasion for education trade unions to discover an evidence-based assessment of policy developments and investment patterns across the European region.
- > To strengthen and enhance the knowledge and involvement of education trade unions in the European Semester on education and training by providing them with effective tools to set priorities and choose the right actions, in accordance to their capacities and resources.
- > To identify, explore and share good practice examples in terms of objectives, strategies and lessons learnt from the project activities to influence national reforms and investment in education and training.
- > To demonstrate the European region’s support for the EI global response to commercialisation in and of education in a strong substantial manner.
- > To demonstrate ETUCE’s support for the ETUC campaign “Europe needs a pay rise” by stressing that cuts in education budget deteriorate working conditions and quality of education in Europe.
- > To generate fruitful debates between ETUCE member organisations and all relevant stakeholders on the key challenges and possible solutions to foster quality, inclusive education, supported by adequate funding, through effective social dialogue.
- > To give ETUCE member organisations the opportunity to interact with policy-makers and gain a deeper mutual understanding of the views on policies regarding investment in education across Europe.
- > To share with Members of the European Parliament, European Commission, education employer organisations and other trade union federations as well as civil society representatives the evidence-supported case for social dialogue and investment in education as a positive and necessary policy for supporting socio-economic development and tackling inequality throughout Europe.

## Project Description

Upon the observation that many national education trade unions have yet to define and implement a cohesive strategy regarding their involvement on the European Semester, ETUCE has carried out a two-year project “Investing in Education: Strengthening the involvement of teacher trade unions in the European Semester on education and training” in the aims of training and guiding member organisations through the complex process of the European Semester. The importance of this project is also reaffirmed by the connections between the working of the European Semester and its impact on four specific aspects of education:

- > the levels of public spending on education in Member States constrained by contracting economies and the need to pursue ‘fiscal responsibility’ targets within the Semester;
- > the extent to which Country Specific Recommendations shape education policy and reform priorities;
- > the involvement of education trade unions in social dialogue about the education reform and financing issues impacting them and their members;
- > privatisation patterns in and of education across Europe, as a result of downward pressure on public investment and rising societal demands.

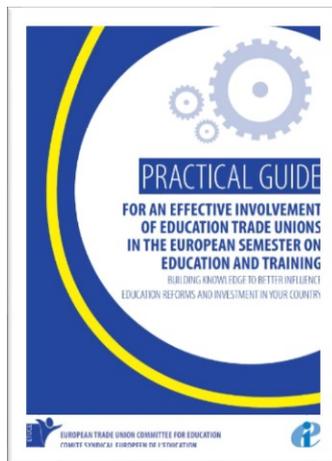
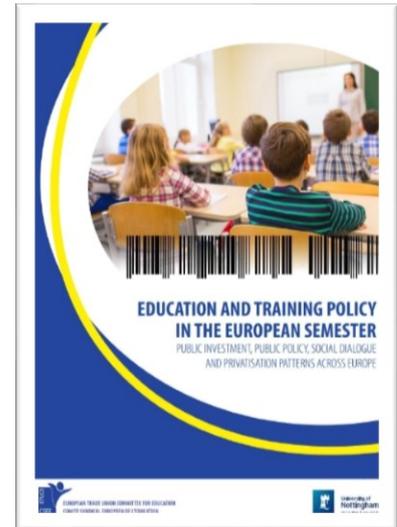
ETUCE, and its project partners, the Danish Union of Teachers (DLF), project co-applicant and Malta Union of Teachers (MUT), the Federation of Lithuanian Education and Science Trade Unions (FLESTU), the Italian Federation of Workers in the Knowledge sector of CGIL (FLC CGIL) and the Education, Science and Culture Trade Union of Slovenia (ESTUS), composing the Advisory Group, are supervising the project:



In the frame of the project, four training seminars took place through 2015 to 2017, in Malta, Lithuania, Italy and Slovenia and aimed at equipping education trade unions with the adequate know-how needed to strengthen their involvement in the European Semester on education and training. Next to the trainings, the project is centred around research and the gathering of factual information and shared national experiences, which are at the heart of the two concrete outcomes of the project: the Research Report and the toolkit on the European Semester.

The research report *‘Education and Training in the European Semester: Public Investment, Public Policy, Social Dialogue and Privatisation patterns across Europe’* (available in [English](#), [French](#) and [German](#)) is the result of a two-year research conducted by the project’s external expert, a team lead by professor Howard Stevenson, Director of Research at the University of Nottingham. This in-depth analysis aims at providing evidence on the effects of the European Semester on education policy and investment.

Further to analysing the connections between national and EU policy making on education reforms and investment, the report highlights the dynamics between actors involved in the European Semester and the changing nature of investment in education, including privatisation patterns across Europe.



The toolkit *‘Practical Guide for an Effective Involvement of Education Trade Unions in the European Semester on Education and Training’* (available in [English](#) and [French](#)) is intended to help ETUCE member organisations navigate through the complex cycle of the European Semester. It provides an overview of the timeline, various actors and documents involved, as well as useful tips in order to evaluate the best strategies to influence on the cycle and best practice examples.

While both documents can be read separately, they are complementary as they take different approaches on the subject and contribute to provide a whole analysis on the European Semester on education and training.



**Susan Flocken, ETUCE European Director, Dorte Lange, ETUCE Vice-President, and Fiorella Perotto, Deputy Head of Unit, DG Education, Youth, Sport and Culture**

## Words of Welcome

**Susan Flocken, ETUCE Director,** welcomed the participants to the Conference. She stressed the link between the European Semester and social dialogue. For ETUCE, quality education for all is a fundamental right, which is particularly important in the current context of rising populism. Time-wise, the inception of the European Semester has gone in parallel with increasing trends of unilateral decision making by governments, in the face of more immediate economic concerns.

Education is central to manage changes in the new economy based on knowledge, therefore, it is no

surprise that it stands at the core of the Europe 2020 strategy and of the European Semester economic governance coordination. The project ‘Investing in Education’ has informed ETUCE member organisations about procedures, actors and timeline of the Semester. This topic is linked with EI’s campaign against the commercialisation and privatisation in and of education, and ETUC’s Pay Rise campaign, as precarious working conditions and low wages for education workers cause brain drain in some countries. The European Semester is as a policy space where social dialogue needs to be strengthened.

## Delivering Education and Training reforms across Europe – An ambivalent involvement?



### Introduction to the panel

**Dorte Lange, ETUCE Vice-President, DLF, chair to the panel:** *“The challenges are common for many countries. Quality education requires substantial public investment. To ensure this, education trade unions can create a triangle of concertation with politicians, researchers, and practitioners. The European Semester offers opportunities to work in that direction.”*

### 1. European governance and cooperation: shaping reforms and investment on education and training

**Fiorella Perotto, Deputy Head of Unit for Strategy and Investment at DG Education, Youth, Sport and Culture, European Commission:** Social policies have taken a new turn, as demonstrated by two overarching initiatives such as the White Paper on the future of Europe and the European Pillar of Social Rights. While investment in education varies greatly across Europe, with an average of 4.5% of GDP, good performances in terms of quality and inclusiveness of education are the result of a policy mix, between long-term investment, good governance, and policies. The crisis has led to fiscal restraints, but can’t only explain the decline in investment in education (ex: demographic changes). The Semester develops around a constant dialogue between EU and national authorities and enables to speak to many stakeholders, but can reduce the visibility for some sectors, such as education. As regards EU budget opportunities during the negotiations for the EU funds, the national agreements should address the priority challenges that are identified within the Semester. Both ET 2020 and the Semester rely on evidence displayed in the Education and training monitor. There is often insufficient evidence and opportunities to determine if governments invest enough in public education. European funding policies (ex: Erasmus+) also need to be targeted. Private funding can support education and training policies but it does not replace an efficient mix of policies and public funding. New initiatives, such as the European Fund for Strategic Investment, or the Structural Reform Support Programme help assist countries in developing capacities to make the best use of resources available at the EU level and to prepare structural reforms.

## 2. Mapping education reforms and trade unions' involvement on the European Semester on education and training in post-austerity Europe



Howard Stevenson, Director of Research, University of Nottingham

Howard Stevenson, Director of Research, University of Nottingham, presented the headlines of the research report as outcome of the project. While decisions made about education at the institutional level affect the practice of teachers, few people know what the Semester is about. Through this process, education and economic policies overlap. The Country Specific Recommendations (CSRs) are generally open, and can be shaped and influenced in positive or negative ways. Education features prominently in the CSRs, although they are of 'second order' as they are not underpinned by sanctions, compared to 'first order', which ought to implement fiscal targets. They are often open, and co-constructed between the Commission and Member States. There is a claimed rebalancing to feature social objectives more prominently, as well as an institutional commitment to social dialogue.

This context provides three opportunities for trade unions:

- ✓ The process of the European Semester is kicked off by the publication of the Annual Growth Survey. As there is a basic commitment to social dialogue at that point, most of the input at that stage is done through the cross-sectoral social partners;
- ✓ The Country Reports mark the second opportunity for social partners to get involved. The research report shows that education trade unions contribute effectively to the Country Reports in some countries, and not in others.
- ✓ The third opportunity is the CSRs, but by the time they have been drafted, they have already been discussed and it is more difficult to change. Trade unions should make sure their strategies to influence the CSRs are timely. Other important documents are the education and training monitor and the national reform programmes.

The research shows that there is also a need to exploit informal opportunities like an on-going dialogue with European Semester Officers and DG EAC Desk Officers, and to shape and implement strategies. He recalled that European Semester is about trying to influence a discourse and set an agenda.

**Discussion: Fiorella Perotto:** Representatives of the European Commission in Member States have the opportunity to meet with social partners, although not necessarily at the sectoral level. The Commission is very keen to have a comprehensive view of what is happening in the countries. The fact-finding missions provide valuable information but sometimes the data collected can be difficult to use. Public investment can be supported by private investment, (ex: privately-funded infrastructures). The involvement of private investment goes together with accountability, there need to be a responsibility from the private investors in delivering what was promised, with tight regulations. Public spending in education is an investment, and there have been attempts by the Commission to formally acknowledge the role of investment in spending in education, but resistances at the national level prevented this.

## Does one strategy fit all? How can education trade unions influence reforms and investment in education and training

### Introduction to the panel

**Odile Corderlier, ETUCE Vice-President, SNES-FSU, chair to the panel:**  
*“The project on “Investing in Education” was kicked off by ETUCE in order to develop an expertise and to determine actions to carry out in regards to the ETUCE Action Plan on the Semester, based on research. As we will see in the following examples, there are different levels of awareness across all ETUCE member organisations on the topic.”*



### 3. One size fits all? Experience from National Education Trade Unions: Objectives, Strategies, Lessons Learnt from the Project Activities and Outcomes



**Kristina Aaltonen, Odile Corderlier, Tatjana Babrauskiene and Dorota Obidniak**

**Dorota Obidniak, ZNP, Poland:** ZNP has been actively engaging with the Commission’s representation in Warsaw, by participating in meetings, along with delegations of experts and academics. ZNP was provided with the draft Country Reports in preparation to these meetings. In March 2017, a delegation including ZNP representatives met Valdis Dombrovskis, the European Commission Vice-President for the Euro and Social Dialogue. Commission representatives asked social partners for their inputs on the upcoming reforms of schools, and took them into account for the Country Reports. This proves

that the voice of trade unions can be heard. Another important tool is the Monitoring committee, established by the European Commission. It is a steering Committee, which decides on allocating EU-financed grants to some programmes. On the topic of education and research, it involves all education trade unions, and also the Ministry of Education.

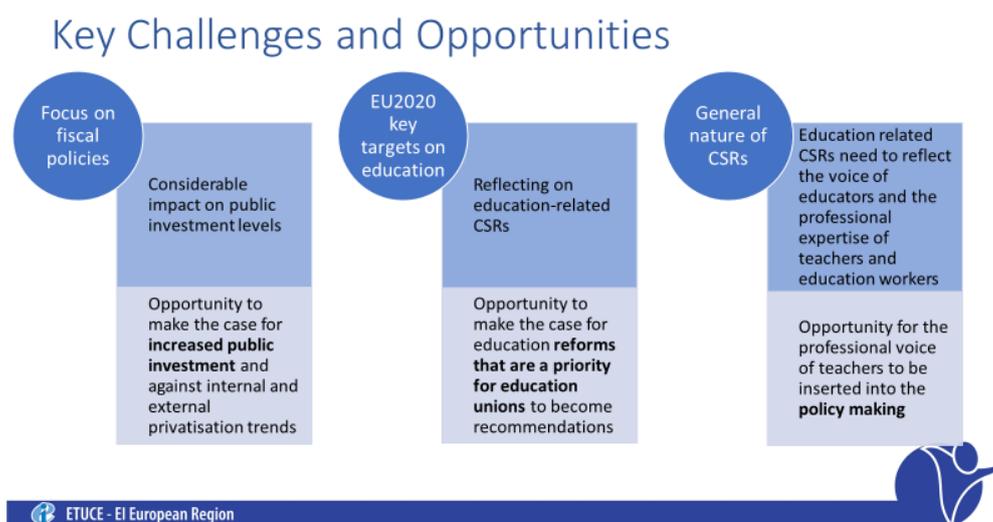
**Tatjana Babrauskiene, FLESTU, Lithuania:** Despite formal consultations, working groups, and a permanent involvement of education trade unions in Lithuania, the results are disappointing. An effective involvement depends a lot on the political coalition in power and their willingness to involve trade unions. Unity and common strategies between trade unions is thus crucial. The Lithuanian public sector relies greatly on the EU Structural Funds, creating an issue of sustainability. One main challenge for education trade unions’ involvement in the Semester is the lack of visibility of the roles of European Semester Officers, and their turnover.

**Kristina Aaltonen, DLF, Denmark:** DLF has started working on the European Semester in 2014. This first phase consisted of learning, listening, and identifying relevant actors. In 2015-2016, DLF proceeded to acting, meeting the Ministry of Education, the national trade union confederations, the European Commission representation in Denmark as well as the Semester Officers. It is important to establish the political discussion on the Semester within the organisations. Unions must establish the political ground, be proactive, use relevant policy recommendations and networks. The challenges are the lack of human and financial resources to work specifically on the Semester, develop a strategy, integrate this work in the general work, and spread the knowledge in all relevant parts of the organisation. There are unused possibilities of collaboration between ETUCE member organisations.

**Discussion:** For most ETUCE member organisations partners to the project, the importance of the European Semester and the opportunities for influence weren't apparent before the start of the project. When building a strategy, it needs to be done with other sectoral federations. In the case of Poland, there is a general sense that because of the consultation, the CSRs are reliable. ZNP often works with these documents and considers the Commission as an ally for working on education and training priorities.

#### 4. ETUCE Toolbox: Facilitating the Involvement of education trade unions in the European Semester on education and training: Setting Priorities and Choosing the right actions

**Paola Cammilli, Policy Coordinator, ETUCE** presented the practical guide published by ETUCE as an outcome of the joint work with the expert team but also the trainings organised during the project. There are important opportunities for education trade unions to make an impact on the process of the European Semester, and the purpose of the toolkit is to maximize them, as key challenges can also be changed into opportunities.



The key actions are: strengthening cooperation at all levels and develop social dialogue in the European Semester. National education trade unions could develop various actions, including early

interventions, develop relationships and build alliances to influence the Semester. It is crucial to identify the right policy space and timing of action. There are five main entry points: the Annual Growth Survey, the Education and Training Monitor, the Country Reports, the National Reform Programmes, and the CSRs. Being involved in the European Semester requires responsibility, resources, and support from the national organisation. The Semester is a political process and subjectable to political pressure.

**Discussion:** Spanish education trade unions reported that there is neither involvement nor information provided by the Ministry of education. The involvement of social partners in discussions regarding the European semester is a matter of timing. While the situation is dire in some countries, it can change in the future. There is a commitment from the Commission, but also the European Council, to the meaningful involvement of social partners. There are some concrete ways to come around the problems at national levels. One of these ways could be gathering countries with the same desk-officers in charge of the education and training monitor (they are usually in charge of three countries).

## Impact of the European Semester on education investment patterns across Europe – A pathway to privatisation?

### 5. Unveiling Privatisation Trends and Shaping Education Investment across Europe in Times of Economic Crisis, Survey Results

**Howard Stevenson, University of Nottingham:** The causes of the crisis lay in the vicious cycle of austerity. Recessions automatically increase public spending, because of the pressure on areas such as social protection, which injects demand into the economies. However, the Stability and Growth Pact (SGP) rules require national governments to reduce the size of their deficits and many governments have responded to this concerns via cuts in public expenditure. The education sector is disproportionately affected to make up for that void. Two different scenarios are taken as example:

- > **High drama countries**, such as Italy (low proportion of GDP on education, and decreasing trends, leading to performance weaknesses)
- > **Low drama countries**, such as Denmark (highest percentage of GDP on education in EU, these systems are relatively high performing)

There is a contradiction in the recommendations within the European Semester: there is a set of recommendations (*first order CSRs*, set with view to enforce the SGP) that put a dire pressure on spending, but also *second order CSRs* that promote education as a source economic growth. The need to increase efficiency, or “get more for less” can open the door to private investment. There aren’t many examples of classic privatisation, but there are forms of internal privatisation, thus making schools behave like enterprises. The most affected sector is higher education.

## 6. Turning evidence into political action: the Global Response to Commercialisation and Privatisation in and of Education – Europe in a Global context



Angelo Gavrielatos, Project Director,  
Education International

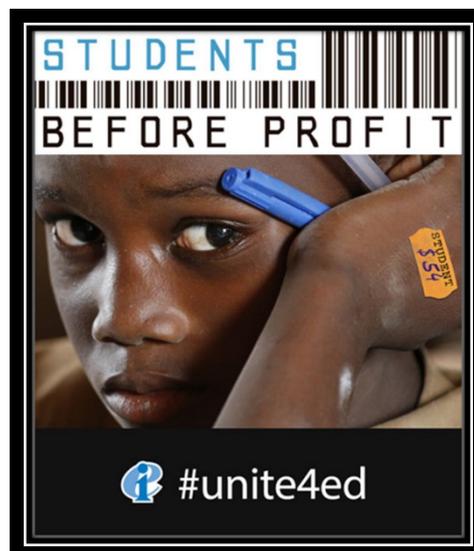
**Angelo Gavrielatos, Project Director, Education International:** A global response to privatisation and commercialisation is overdue. Unions need to turn evidence into political action, through capacity building, organisation, building alliances, and advocacy. Around the world, education businesses are rising, as education is seen as a profitable and sustainable capital venture.

The two key areas are:

- > the Global education reform movement – in developed countries,
- > For profit school models, corporate driven actors – in developing countries.

There are many examples of privatisation in and of education, for example in the Philippines (unqualified staff, standardized curriculum, in subpar facilities), in India (low fee for profit schools models), in Kenya (Bridge international academies, unqualified staff), and in Uganda (Bridge schools were shut down). Solidarity between organisations, with a focus on north/south cooperation, is key.

During the discussion, the recent trend of creation of private schools with particular ideological orientations, notably far-right oriented in France, was mentioned. These schools (about fifteen) have real financial means. The voice of EI on the World Bank/PISA tests is very clear. Countries like Serbia have longstanding stressed the importance of a common answer to the questions on the future of public education, especially as the International Monetary Fund conditions policies. It is important to build up capacities in European countries as well, to raise awareness on what is at stake. The involvement and mobilisation against privatisation at national levels of EI/ETUCE member organisations is critical.



## Education as a public good: Rebalancing economic and social priorities in Europe through effective social dialogue

### Exchanges with relevant Social Partners and Stakeholders

**Stephane Vanoirbeck, SEGEC, EFEE:** The European Semester is a delicate issue within EFEE as some members are national authorities/Ministries and others are organisations of school heads. The demands for more involvement of social partners vary greatly. Privatisation trends in education is also a subject of concerns for EFEE members. However, social dialogue is a great opportunity, and there are some promising initiatives in that regards, notably in Francophile Belgium, with the negotiations for an agreement.

**Sigried Caspar, DG EMPL, European Commission**

Within the Commission, social themes are more and more central and this can be read as a positive signs. In respect of the principle of subsidiarity, social issues are mostly under the authority of national governments, who tend to consult businesses more than unions in many sectors. This is also true for the education sector. Underinvestment in education can have durable effect. The Commission is very interested and social partners in education should be enticed to contribute. Three major points are lifelong learning, social integration, education to foster competitiveness, and education as a lever for creativity. Social dialogue is a very democratic exercise.

**Richard Pond, EPSU Coordinator for Collective bargaining and social dialogue**

EPSU members are also very affected by the European Semester process. One longstanding concern for EPSU was the austerity-oriented approach taken by the European Commission before the Juncker Commission. Still, to this day, fiscal consolidation is the main objective, albeit with a different name. A significant boost in public investment to compensate for the years lost is needed. There is a growing recognition of the role of social partners at both national and EU level, and a rise in awareness on the European Semester from national members as well. There is a lot of work produced in that sense, by the Semester Alliance, but also research projects on the impact of the Semester as well, with self-assessments of EPSU member organisations' actions in that regard. EPSU is still waiting to see signs from the Commission that there is scope for more public investment.

During the discussion, it was mentioned that the focus on social issues from the Commission is in response to the social crisis. The rise of extremism and radicalism throughout Europe is a worrying trend. In recent years, there has been a trend of recommendations for boosting public investment. This trend only concerns countries that were already better off in terms of economic performance and have room in their budgets. Overall, social partners' involvement has improved at EU level, but not at national level. Thus, the main question is the space to improve the involvement of social partners and to implement the Commissions' commitments at the national level. The more social partners unite, whether on specific subjects or not, the more they will be listened to, and it is also a matter of coordination.

## Closing of the Conference, Next steps

**Odile Cordelier** concluded the meeting with one preliminary remark: the process of the European Semester is inherently political. It is a political process used by national governments and the European Commission with the potential to impact on educational reforms, and the role of ETUCE in this process is important. In this context, she highlighted four points of reflections for further action:

- > **How can education trade unions access to a bigger influence?** How can they bring expertise, analyses, remarks, proposals? How can they fully take advantage of their status as social partners in this process at national level? ETUCE's effort to influence this process at European level should primarily impact at national level.
- > The research report is a picture of the current situation. She invited participants to read the report's conclusions on the **impact of the European Semester on investment, the CSRs, social dialogue and privatisation in and of education.**
- > There is a need for proposals from education trade unions, and it is time to think about a **revised ETUCE Action Plan** on the European Semester.
- > Participation to the conference is only fruitful if participants leave with the **will to engage in an analytical and proactive approach** within their own, and with other organisations, continuously inform ETUCE secretariat of their developments, and contact the European Semester officers in their countries.

Odile Cordelier thanked participants and speakers for very interesting contributions on this complex topic and wished for an effective dissemination of the outcomes, as this is not the conclusion but a step forward in an ongoing process.





**European Trade Union Committee for Education  
Comité syndical européen de l'éducation**

Bd du Roi Albert II, 5 – 9th Floor  
B-1210 Bruxelles, Belgique

T + 32 2 224 06 91/2  
F + 32 2 224 06 94

*secretariat@csee-etuice.org*  
*www.csee-etuice.org*