



European Trade Union Committee For Education

HANDBOOK

for an Effective Involvement
of Education Trade Unions
in the European Semester

*Fighting austerity
for quality education*

updated version - **2025**

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1 Making a difference in the European Semester

This **handbook** aims at supporting ETUCE member organisations to channel their efforts and be able to make a difference in the European Semester process.

In the aftermath of the 2008 economic crisis the European Semester appeared adversarial and punitive and, in the following years, it became functional to the controversial management of the government-debt crisis in several EU Member States.

The European Commission has since committed to a new start for social dialogue aiming to a better involvement of social partners in European and national policy development. What this commitment amounts to in reality is, yet, unclear, and many hints do not point to the right direction. In addition, the economic governance reform of 2024 has contributed to opening a new season of austerity policy in Europe.

However, the European Semester remains a crucial political and economic process, with significant implications for all aspects of education across every EU Member State and candidate country. It is therefore essential for education trade unions to engage with it in order to shape employment and education policy for the best.

2 Why should education trade unions get involved in the Semester?

The European Semester can look like a cycle of big set piece events, with few opportunities for education trade unions to be involved. Education trade unions should make every effort to ‘push the door open’ early in the process to make sure that their views are known, and that unions are invited to be involved at all the key points.

The European Semester has a sharp focus on economic policy priorities and monitoring the fiscal performance of Member States. However, education policy features prominently in the process, and there is the potential to have a considerable influence on policies that impact students and teachers across all levels of education.

- The Semester’s focus on fiscal policy in Member States has a considerable impact on public investment levels. This impacts public expenditure on education, with all the consequences for providing quality education for all. The Semester provides a chance to make the case for increased public investment, particularly in education services.
- The European Union policy often present key education targets, and these are reflected in the recommendations presented to Member States through the Semester process. Education-related recommendations feature very prominently in the European Semester and influence the allocation of national public investments. Recommendations can range across every sector of education, from early childhood education through to higher education and research. The Semester represents an opportunity to make the case for education policies that are a priority for education trade unions to become recommendations to Member States.
- Education-related recommendations need to reflect the voice of educators and the professional expertise of teachers and associated education workers. It is the nature of the Semester process that many education-related recommendations are general in nature.

In summary, it is important for education trade unions to engage with the European Semester because it is a key policy process with the potential for considerable impact on education policy in Member States. The Semester process provides an opportunity, a ‘policy space’ to shape the education policy discourse in Member States. This is not necessarily easy, and there are many reasons why the involvement of education trade unions in social dialogue relating to the Semester is not as embedded as it might be. However, there are opportunities to make an important impact on policy. The purpose of this handbook is to help education trade unions maximise that opportunity.

3 What is the European Semester?

Introduced in 2010 following the Eurozone crisis, the European Semester is the European Union's framework for the coordination and surveillance of economic and social policies.

The European Semester ensures that Member States discuss their economic, social, and budgetary plans with their EU partners at specific times in the first half of the year – hence the term Semester – so that national action can be accordingly taken in the second part of the year, notably with the adoption of the budgets for the subsequent year. This early interaction allows them to comment on each other's plans and monitor progress collectively. It also allows them to take better account of common challenges.

Through the various phases of the Semester, each year, the EU institutions scrutinise and guide national economic, fiscal, and social policies, especially within the Euro Area. However, all EU Member States are affected by the process and, to a smaller extent, also EU candidate countries.

The EU key rules relating to fiscal policy and deficit management were established by the Stability and Growth Pact (SPG) in 1997. Since the 2009 economic crisis, more attention has focused on enforcing these rules, and creating the legislative and governance structures to manage this process. The legislative packages known as the Six Pack (2011), Two Pack (2013) and the Treaty on Stability, Coordination and Governance in the Economic and Monetary Union (2012) have all strengthened the mechanisms to ensure budgetary targets are met, with the possibility of sanctions if SGP rules are transgressed.

As a reaction to the COVID-19 pandemic crisis, some of these budgetary rules had been temporarily lifted. In the 2024, the reformed European economic governance system, proposed by the European Commission and agreed with Member States, has entered into force.

4 Evolution of the European Semester

Initially driven by the Europe 2020 objectives, the European Semester has gone through multiple phases to adapt to the emerging challenges the EU has faced in the past decades.

2011 – 2014

The European Semester was first established as a coordination mechanism aimed at restoring financial stability and convergence in countries whose national budgets and economic policy were not in line with EU medium-term macroeconomic and fiscal objectives. The main objective of the Semester at this stage was to merely synchronise and coordinate instruments and procedures related to budgetary and economic policies.

The European Semester entailed a common timeline for setting and approving national budgets and introduced recommendations on fiscal, macroeconomic policies and structural reforms for Member States, excluding EFTA and EU candidate countries.

2014 – 2020

During this period, the European Semester evolved from being a mere budget surveillance towards a 'socially oriented' economic governance tool. All Member States committed to achieve the **EU 2020 Targets** and had translated them into national targets. The EU 2020 Targets covered various areas, such as employment, R&D and innovation, climate change and energy, poverty and social exclusion. Regarding education policy, the targets particularly mentioned the two objectives of reducing school drop out rates below 10%, and ensuring that at least 40% of 30-40-year old complete third level education.

2021 – 2024

Following the COVID-19 pandemics, the European Commission decided in March 2020 to activate the **general escape clause** of the Stability and Growth Pact, a clause which allows Member States to deviate from the usual reference values of 3% of GDP budget deficit and 60% debt-to-GDP ratio on a temporary basis to be able to provide the required massive fiscal response to counter the adverse effects of the pandemic.

In 2022, the Commission put forward a proposal for a new governance framework confirming the Treaty reference values for budget deficit public debt, and introducing the possibility of having reference adjustment paths for Member States to be put forward by the Commission. All Member States have to present medium-term fiscal-structural plans that set out country-specific fiscal trajectories as well as priority public investment and reform commitments that together should ensure sustained and gradual debt reduction and sustainable and inclusive growth. Member States would then be required to address the priorities identified in country-specific recommendations (CSRs) issued in the context of the European Semester.

Another key change was the introduction of **NextGeneration EU**, an economic recovery package driven by five objectives identified by the European Commission: green (building on the European green deal), digital (also impacting e-education and training for digital skills), healthy (modernising European health systems, investing in research and innovation), strong (fostering science and technology uptake), equal (ensuring equal opportunities).

The Commission introduced the **Resilience and Recovery Facility (RRF)**, a recovery instrument aiming to raise funds to help Member States implement reforms and investments that are in line with the EU's priorities and that address challenges identified in country specific recommendations. In this context, the then revised European Semester had been aligned with the RRF cycles to improve efficiency and accelerate the transitions. It was also accompanied by the "RRF Scoreboard", a scoreboard which aims to give an overview of how the implementation of the RRF and the national recovery and resilience plans were progressing. It also displayed the impact of the RRF on the six policy pillars¹ set out by the RRF regulation.

In parallel, the European Commission also launched **RePowerEU**, a plan to rapidly reduce dependence on the Russian fossil fuels and fast forward the green transition. Obviously linked to the Russian invasion in Ukraine, the plan aimed at addressing the double urgency to transform Europe's energy system by ending the EU's dependence on Russian fossil fuels, which are used as an economic and political weapon and cost European taxpayers nearly €100 billion per year, and tackling the climate crisis.

2024 to present

On 29 April 2024, the Council of the European Union adopted the package of legislation reforming the **EU economic and fiscal governance framework**². The new rules entered into force on 30 April 2024. The reform introduces a tailored approach for each member state, taking account of different fiscal positions, public debt levels and economic challenges across the EU³.

Member States must avoid excessive government deficits and debts, in line with the Treaty on the Functioning of the EU (article 126(1) TFEU). In practice, this means that Member States should not exceed the reference values of **3% deficit and 60% debt ratio**. The Commission uses a control account to monitor Member States' cumulative upward and downward deviations from their agreed net expenditure paths: the **excessive deficit procedure** (EDP).

The Commission submits a **reference trajectory** covering four years to Member States in the case government debt exceeds the 60% of gross domestic product (GDP) or the government deficit exceeds the 3% of GDP. This reference trajectory aims at decreasing the projected general government debt-to-GDP ratio by a minimum annual average amount of 1% of GDP if the general government debt-to-GDP ratio exceeds 90%, or 0,5% of GDP when the general government debt-to-GDP ratio remains between 60% and 90%. The reference trajectory is based on the **debt sustainability analysis** (DSA) applying to each Member State, and it comes as the result of the so-called “technical dialogue” between the European Commission and Member States that prepares the submission of the national medium-term fiscal structural plans.

Under the new framework, each Member State prepares a **medium-term fiscal structural plan** (MTFSPs)⁴, spanning four or five years. This plan contains its fiscal reform and investment commitments. Based on their reference trajectory or technical information, Member States incorporate their fiscal adjustment path, expressed as a **net expenditure path**, into their national medium-term fiscal structural plan.

These plans and net expenditure paths must be endorsed by the Council, further to an assessment by the Commission. If a member state requests an extension of the **adjustment period**, normally of four years, the set of reform and investment commitments underpinning that extension must also be endorsed by the Council. If a member state’s national medium-term fiscal-structural plan does not comply with requirements, the Council, on the basis of a recommendation from the Commission, adopts a recommendation setting out the net expenditure path and, as appropriate, endorse the reforms and investments underpinning the possible **extension of an adjustment period** up to three years.

In order to simplify the EU’s fiscal framework and increase transparency, a single operational indicator anchored in debt sustainability serves as a basis for setting the net expenditure path and for carrying out annual fiscal surveillance for each member state: the **net expenditure indicator**. It is based on nationally financed net primary expenditure, i.e. expenditure excluding discretionary revenue measures, interest expenditure, cyclical unemployment expenditure, national expenditure on co-financing of programmes funded by the EU, and expenditure on EU programmes fully matched by revenue from EU funds.

The rules provide for the possibility of activating a **general escape clause**, thereby suspending the rules for all Member States in the event of a severe economic downturn in the euro area or the EU as a whole, provided that doing so it does not endanger fiscal sustainability in the medium term. Activation of the clause has a one-year time limit, but this may be extended. Under the new rules, a **national escape clause** may be activated by the Council if this is requested by a member state and recommended by the Commission.

5

Key actors

In order to fully understand the European Semester, its core elements and to be able to meaningfully engage with it, we need to identify all the stakeholders involved in the decision making process and understand their various interests.

European Council

The European Council is constituted of the 27 EU Member States' Heads of State or governments. The EU Council is a steering political body within the process of policymaking in the EU, as it defines the general political orientations. In the context of the European Semester, the European Council provides the policy orientations on fiscal, macroeconomic and structural reforms in March. In that period, it also adopts the economic priorities based on the Annual Sustainable Growth Survey. In July, the European Council formally endorses the Country Specific Recommendations.

Council of the European Union

The Council of the EU (or the Council) is an institution comprising the 27 Member States national ministers of various portfolios. The Council is divided into ten thematic formations. The ECOFIN Council unites the 27 ministers of economic and financial affairs, in order to decide on issues regarding these topics. Consequently, the ECOFIN Council is the main lead in the Council's actions related to the European Semester. In November, it discusses the European Commission's opinions on Member States budgetary plans. It adopts conclusions on the Annual Sustainable Growth Survey and the Alert Mechanism Report, as well as the Euro-area recommendations in December. The Council also discusses the Commission's Country Specific Recommendations drafts in June, and adopts them after the endorsement of the European Council.

European Commission

The European Commission is the independent institution that holds the monopoly on EU legislative initiative. As such, it is regarded as one of the most important European institutions, and undertakes a key role in the shaping of the European Semester. Each Autumn, the Commission publishes the Annual Sustainable Growth Survey and the Alert Mechanism Report in November, and conducts fact-finding missions in the Member States in December and January. The data collected is used to issue the Country reports in February. Finally, in May, the Commission publishes the Country Specific Recommendations valid for the next 12 to 18 months. In case of Member States' non-compliance, it can issue warnings.

The Commission has a European Semester Officer (ESO) in each Member State. These people are line managed from the EC's Secretary General's office, but based within the country for which they are responsible. Their role is to support the work of the country team based in Brussels. The ESOs can be considered as the 'ear on the ground' of the country team. They provide a two-way communication between the Commission and Member State government, as well as liaising with local social partners and stakeholders, for example organising meetings with country team representatives. Another key figure with whom it is important to build relationships are the Desk Officers representing the Directorate-General for Education and Culture (DG EAC). It is important to emphasise the need to develop informal networks and channels of communication. This may not always be possible, and personalities can play a key role here. It is essential to maintain on-going informal relationships with key actors in order to communicate key messages.

The stakeholder meetings (such as fact-finding mission meetings) are an important formal part of the process, but they are necessarily limited in their impact. They are quite brief, and often Commission representatives already know the key issues before arriving in the country. By this time, it is likely that Desk Officers are looking to 'test' their ideas and assessments rather than looking for new political agendas. Influencing the country report requires early, on-going and often informal contact. Alliances are important, and sometimes unusual – e.g. trade unions using recommendations from the Semester to put pressure on the Finance Minister to increase investment in education.

European Parliament

The European Parliament is the co-legislator on most European legal decisions along with the Council of the EU. In the process of the European Semester, the Parliament is involved through the economic dialogue. It conducts various discussions in parallel to key events throughout the European Semester process: in November and December, at the occasion of the Annual Sustainable Growth Strategy, and in May and June, at the occasion of the proposal of Country Specific Recommendations. The Parliament usually organises debates and publishes resolutions on the European Semester and the Country Specific Recommendations in the month of September, period during which it also starts a dialogue on the upcoming Annual Sustainable Growth Strategy for the next cycle.

National governments

National Governments are the recipients of the policy recommendations issued during the European Semester. Therefore, they are invited to submit their medium-term plans and progress reports and Stability and Convergence Programmes around March and April to the European Commission. The national governments are also expected to incorporate their Country Specific Recommendations into their reform plans and national budgets for the following year from August to October.

Social partners

National and European Social Partners have been increasingly involved in the process of the European Semester. It is however important to note that the part played by social partners has never been formally defined. Consequently, the degree of involvement of social partners varies greatly depending on the willingness of Member States and the quality of the tradition of social dialogue in each country. Theoretically, social partners are to be consulted by the European Commission, through its Representations in each Member State, ahead of the publication of the Annual Sustainable Growth Strategy in November, as well as the Country Reports and Country-Specific Recommendations in May/June. Social partners are additionally expected to be involved by national governments in the process of designing the national reforms and stability and convergence programmes around March/April.

6 Timeline

September–November

State of the Union and 'Autumn Package'

In September each year, the President of the European Commission delivers the State of the Union address to the Parliament. The address takes stock of the achievements of the past year and presents the priorities for the year ahead. The President also sets out how the Commission will address the most pressing challenges the European Union faces and ideas for shaping the future of the EU.

The European Semester cycle starts with the publication of the so-called Commission's 'Autumn Package', which includes the Annual Sustainable Growth Survey (ASGS), the Alert Mechanism Report (AMR), the proposal for a Joint Employment Report (JER), which includes the Social Scoreboard, the Social Convergence Framework (SCF), the proposal for recommendation for the euro area, and the Commissions opinions on the draft budgetary plans of euro area Member States.⁵

- **Annual Sustainable Growth Survey.** This document sets out the general economic and social priorities and provides Member States with policy guidance for the following year. Since the 2020 cycle, the ASGS is structured around four dimensions that encompass the EU objective of competitive sustainability: fairness, productivity, environmental sustainability, and macroeconomic stability. These four key dimensions are crucial in implementing the Sustainable Development Goals (SDGs). According to the Commission's communication, integrating the objectives of the SDGs in the European Semester, with a specific focus on the economic and employment aspects, provides a unique opportunity to put people, their health, and the planet at the centre stage of economic policy. In today's geopolitical context, putting the SDGs at the centre of the Union's policymaking and action also sends a strong message about Europe's commitment towards sustainability.
- **Opinions on the Draft Budgetary Plans of euro area Member States.** These opinions provide the Commission's evaluation of how Member States' draft budgets for the upcoming year align with EU economic fiscal rules. It includes an overarching Communication.
- **Alert Mechanism Report.** It is the starting point of the annual Macroeconomic Imbalance Procedure (MIP). The MIP aims to identify potential risks, prevent the emergence of harmful macroeconomic imbalances and correct the imbalances that have already materialized.
- **Proposal for a Council recommendation on the economic policy of the euro area.** It provides policy advice to euro area Member States on topics that affect the functioning of the euro area as a whole;

- **Post-programme surveillance reports.** They assess the repayment capacity of Member States that have benefited from financial assistance programmes.
- **Joint Employment Report.** It analyses the employment and social situation in the EU, related challenges and the policy responses by Member States. The JER includes in its annexes the Social Scoreboard and the Social Convergence Framework.
- **Social Scoreboard.** The Scoreboard analyses through 35 indicators the principles associated with the European Pillar of Social Rights and provides an interactive tool to compare countries and time periods. The datasets presented in the Social Scoreboard are available on the Eurostat website⁶. The Scoreboard tracks trends and performances across EU countries, evaluates national contexts based on the obtained indicators and the progress made in comparison with the previous year. The Social Scoreboard indicators constitute the backbone of the Social Convergence Framework.
- **Social Convergence Framework (first stage).** It is inspired by the principles of the European Pillar of Social Rights and the 2021 Porto Declaration. The Social Convergence Framework entails a two-stage country analysis. The first-stage analysis covers all 27 Member States in order to identify potential risks to upward social convergence that require a deeper analysis of employment and social developments at national and Union level. It is based on the headline indicators of the Social Scoreboard and is included in the yearly Commission proposal for the Joint Employment Report, as part of the European Semester Autumn Package, which is endorsed by the Council in spring. Later in spring, the deeper second-stage analysis of the countries identified in the first stage takes place: it uses the wider quantitative and qualitative evidence available and takes into account the policy responses undertaken or planned by the Member States to address the identified risks.

Education and Training Monitor and 'ETM country reports'

The Education and Training Monitor (ETM) is a report published each year around November. It presents the European Commission's annual analysis of how education and training systems evolve across the EU. It brings the latest available data alongside updates on national policy measures to contribute towards the monitoring of the European Education Area strategic framework. The ETM is produced by DG Education, Youth, Sport and Culture (EAC) and it is likely that the Education Desk Officer within the Semester Country Team is also involved in the production of the ETM.

The ETM consists of the following parts:

- **Comparative reports:** progress towards EU-level targets: the reports complement the 7 EU-level targets with supporting indicators to shed light on context and possible policy levers.
- **ETM country reports:** these reports provide more in-depth insights into the performance of countries with regard to the EU-level targets agreed as part of the European Education Area (EEA) strategic framework.
- **Monitor Toolbox:** it provides an overview of the key indicators used in the ETM and puts a spotlight on the context that the EU-level target and indicator domains are embedded in.

The European Education Area strategic framework was put in place to structure collaboration between European Union (EU) Member States and key stakeholders to achieve their collective vision. The framework does so by strengthening means of policy cooperation and reaching out to stakeholders to encourage their engagement with the initiative; enhancing synergies with other relevant initiatives, including the European Research Area and the Bologna Process; identifying targets and indicators to guide work and monitor progress towards achieving the EEA, and fostering the integration of education and training into the European Semester process.

January-March

Adoption of ASGS, Alert Mechanism Report, Joint Employment Report

The Autumn Package documents are sent to the European Parliament and the Council of the European Union. Between January and February, the Council discusses and adopts conclusions on the Annual Sustainable Growth Survey and the Alert Mechanism Report. It also approves, possibly with amendments, the draft Council recommendation for the euro area. The recommendation is then submitted to the European Council.

In March, the Council adopts the Joint Employment Report with conclusions. The European Council endorses the draft Council recommendation on the economic policy of the euro area. On this basis, EU leaders provide common guidance for the medium-term fiscal structural plans due in April. Additionally, the Commission offers fiscal policy guidance to inform the preparation of these national plans.

The European Parliament also discusses the Annual Sustainable Growth Survey, with the possibility of publishing an own initiative report.

April

Medium-term fiscal structural plans (MTFSPs) or annual progress reports

By the end of April, Member States submit their medium-term fiscal structural plans or the related annual progress reports to the Commission for evaluation. These documents outline a multi-year net expenditure path, aiming to reduce national debt or maintain it at prudent levels. The structural plans also detail the reforms and public investments that countries intend to adopt to enhance sustainability and growth, and addressing key challenges identified within the context of the European Semester.

Starting from 2024, the medium-term fiscal structural plans replaced the former national reform programmes and stability/convergence programmes as part of the economic governance review. The plans cover a period of at least four years, depending on the length of the national legislature.

During the development of the policy plans or progress reports, Member States are expected to take into account the guidance issued through the country-specific recommendations (issued in June-July), the Council recommendation on the economic policy of the euro area and additional fiscal policy guidance by the Commission (issued in January-March).

Social Convergence Framework (second stage)

In the form of a European Commission Staff Working Document, the deeper second-stage analysis of the countries identified in the first stage uses the wider quantitative and qualitative evidence available and takes into account the policy responses undertaken or planned by the Member States to address the identified risks.

May

'Spring Package': Country Specific Recommendations & Country Reports

The Commission presents the European Semester Spring Package, which provides economic and fiscal guidance to Member States following the assessment of the medium-term fiscal structural plan or the related progress report.

The Spring Package generally includes a **Communication** summarising the main elements of the Package, together with the **country reports**, the **country-specific recommendations** for all Member States, the **post-programme surveillance reports** that assess the repayment capacity of Member States that have benefited from financial assistance programmes, and a **proposal on guidelines for Employment Guidelines** that presents common priorities for national employment policies.

- **Country Reports.** The Country Reports take stock of implementation of the medium-term fiscal structural plans and the Recovery and Resilience Plans, analyse the economic and social developments and challenges facing Member States and provide a forward-looking analysis of their resilience. The overview includes an assessment of progress on the implementation of the European Pillar of Social Rights as well. Based on this analysis, the country reports have identified those challenges which have not been sufficiently addressed by the MTFSPs and the Recovery and Resilience Plans. Where applicable, the Reports also include a summary of the findings of the in-depth reviews under the Macroeconomic Imbalances Procedure.

- **Country Specific Recommendations.** The Country Specific Recommendations (CSRs) represent the key action points of the European Semester. It is identified by Commission officials as the third point in the formal Semester cycle where the Commission commits to promoting social dialogue (the other two points being the ASGS and the Country Reports). These are formal outcomes from the Commission-driven element of the Semester and they constitute the expected actions Member States are expected to implement over the next 12-18 months. In recent years it has been decided to limit the number of CSRs made, i.e. typically three per country.

Initial discussion about the CSRs takes place within the Commission's country teams, taking account of the responses received to the Country Reports and the content of the national progress reports. There can be no CSR which does not feature in the Executive Summary of the relevant Country Report. However, there is obviously an intense period of discussion in which all potential CSRs are prioritised in a short-listing process. During this process, different European Commission's DGs seek to protect and advance the agendas of their own Directorate General. Protocols exist for conducting these discussions. As the fine detail of the short list is refined, and reflecting the political importance of the CSRs, the level of decision-making is escalated, with final 'sign off' at the highest level of the Commission.

CSRs are discussed with Member States in the Council, and the Council makes a formal endorsement in July. In many ways the CSRs can be seen as the quintessential expression of the European Semester's 'soft governance'. There is no legislative (hard) power to direct Member States in the Semester. There are powers to direct specific economic policy actions, or to sanction those who transgress rules on deficit management. However, these sit outside the Semester itself, which is a form of governance. On issues outside these prescribed areas the Commission has no power to direct. There are no sanctions for those who do not implement their recommendations and no visible 'naming and shaming'. However, the CSRs are presented as being 'co-produced' between the Commission and Member States and are conceived as 'shared priorities'. There exist forms of conditionality linked to the distribution of European funds and the access to resources allocated under the Recovery and Resilience Facility.

June-July

Adoption of country-specific recommendations

In June, the Council discusses the proposed country-specific recommendations and agrees on a final version. During these discussions, Member States can provide comments on their respective medium-term fiscal structural plans. After receiving an endorsement from the European Council, the Council officially adopts the recommendations in July.

— **August-October** —

Implementing country-specific recommendations

Member States are invited to implement the country-specific recommendations and incorporate them into the reform, public investment and national budgetary plans for the following year. Euro area Member States share their draft budgets with the Commission by mid-October, ahead of the next Autumn Package. The Commission assesses the plans against the requirements of the Stability and Growth Pact, the agreed net expenditure path and the country-specific recommendations.

At the end of the year, Member States finalise their national budgets, taking into account the Commission's Opinions on the Draft budgetary plans from the new Autumn Package.

Following this, the European Semester concludes, and a new cycle begins.

7 What are the key outputs?

In the following section we identify five formal points at which education trade unions can shape the European Semester process:

1. The Annual Sustainable Growth Survey

The ASGS sets the parameters over general economic, employment and social policy over the next 12 to 18 months, within which subsequent Semester processes are framed. The European Trade Union Confederation (ETUC) can be considered as the principal actor representing workers' organisations, with national confederations and European federation feeding into this debate. This discussion can appear remote from the interests of teachers and their unions, but its importance should not be underestimated. ETUCE member organisations should be aware of the key elements of this process (the 'State of the Union' address as well as the ASGS) and be in communication with both ETUCE and their own national confederations to make sure their views are represented.

2. Education and Training Monitor

The ETM provides a key data source for the Semester's Country Report. The Commission often sets up meetings in Member States to discuss the ETM country analysis. Such meetings may not be part of the Semester's formal social dialogue processes, however they are opportunities to shape the discourse around education policy priorities within Member States. These discourses, in turn, impact the overall narrative around the Semester process. Engaging with such meetings, and thinking carefully about how to approach them (deciding on key messages, formulating strong evidence based arguments) is crucial to establish good connection with EU officials and inform their work.

3. Country Reports

The formal opportunity to influence these reports is when members of each European Commission country team make fact-finding visits in the 27 Member States. These are short visits, attended by different members of the country team, where they meet with various Member State government officials, but also local stakeholders. This usually includes meeting with social partners, but it is limited to the national trade union confederation(s). Education trade unions may be invited, depending on local political context, and sometimes on the extent to which they are pro-active in seeking an invitation. Securing involvement in this part of the process is key, bearing in mind that country specific recommendations stems from the analysis presented in the country reports.

4. Medium-term fiscal-structural plans & annual progress reports

These plans and reports constitute a section of the Semester process with usually limited social partners engagement. It comes across as a bureaucratic and technical exercise in which national government civil servants are required to draft a response to the Country Reports. Even with earlier publication of the country reports, as is now the case, civil servants in Member States are under considerable pressure to produce a complex response in a short period of time. Social partners appear to be either forgotten in this process, or intentionally side-lined. Given the potential importance of the MTFSPs and progress reports in terms of setting out the Member State response to the country reports, this is an important opportunity for social partners to be involved in process.

5. Country Specific Recommendations

After the draft CSRs are published, there exists some opportunity to discuss these and influence their content. However, experience shows that at this stage these are high-level and high stakes discussions where it is difficult for those outside of national governments and the European Commission to affect change. Much effort, including managing political expectations, has already been expended, and there is a reluctance to make any changes other than those considered absolutely necessary to secure safe passage of the CSRs through the Council. Social dialogue at this stage appears to be more about communicating messages, rather than listening and responding. Input from education trade unions is possibly best considered as about placing a tactical marker for the next round of the Semester, which, behind the scenes, is already getting underway.

8

A strategy for education trade unions

- 1. *Shape the discourse*:** the European Semester is more a process of agenda-shaping than traditional collective bargaining. Education trade unions need a clear narrative and a long-term vision with clarity of messages. In education policy terms the Semester is often concerned with the big picture, rather than small detail. Education trade unions need to frame their work accordingly.
- 2. *Have a plan*:** it is important to see the Semester as a long-term process. Education trade unions need to have a clear plan about when and how to intervene in the process, seeing the cycle in the whole rather than intervening in a piece meal and ad hoc way.
- 3. *Focus on the beginning*:** the ‘direction of travel’ of the European Semester is set at the beginning of the process. The key content of the country report is probably formed in the Autumn preceding the year the country report is published. Putting effort into influencing country-specific recommendations is far too late. Education trade unions need to try and assert maximum influence as early as possible. As soon as one country report is published, it is time to start thinking about influencing the next one.
- 4. *Take the opportunities and make the opportunities (for social dialogue)*:** the European Commission often provides opportunities to discuss key issues impacting education policy, and to which social partners are invited. This includes meetings to discuss the Education and Training Monitor. These are important opportunities to ensure that the voice of education trade unions is heard, but not all education trade unions attend when invited. Where such meetings do not take place, then unions should request them. This is best achieved through the European Semester Officer and building a relationship with this individual should be a key priority. Informal relationships are as important as formal opportunities.

MAKE YOUR PLAN

- 5. *Allocate resources***: there can be no denying that engaging with the European Semester requires commitment. The European Semester is a responsibility that needs allocating to an appropriate individual with sufficient seniority to represent the organization as necessary. Such a person needs time to build up expertise and resources to engage in networking etc. In some instances, this work may be helped by sharing responsibilities or resources across multiple unions in the same jurisdictions.
- 6. *Create alliances***: The European Semester is a political process and is subject to political pressure. Although appearing as a 'technical process' often carried out by civil servants (and therefore one that is not transparent and democratic) the Semester is open to political pressures in the same way as other political processes. Working with labour movement and civil society organisations makes it possible to amplify the arguments for public investment and quality education for all.
- 7. *Communicate internally***: The European Semester is a technical process that can seem obscure to education trade union officers and members alike. It is important that the wider union leadership are aware of Semester issues if they are to allocate sufficient resources to engaging with it. Educating members can be more challenging, especially when the processes and issues may seem so remote. However, 'opening up the Semester' must be located within a wider project of opening up the European Union to greater citizen involvement and making education trade union members aware of these wider issues should be seen as part of this process.

Endnotes

- 1 Regulation (EU) 2021/241: Green transition; Digital transformation; Smart, sustainable and inclusive growth; Social and territorial cohesion; Health, and economic, social and institutional resilience; Policies for the next generation, e.g. education and skills.
- 2 For a complete presentation of the European Economic Governance Framework: <https://www.consilium.europa.eu/en/policies/economic-governance-framework/>.
- 3 The reform of the European economic governance is composed by:
 - Regulation (EU) 2024/1263 of the European Parliament and of the Council of 29 April 2024 on the effective coordination of economic policies and on multilateral budgetary surveillance and repealing Council Regulation(EC) No 1466/97 (OJ L, 2024/1263, 30.4.2024);
 - Regulation (EU) 2024/1264 of 29 April 2024 amending Regulation (EC) No 1467/97 on speeding up and clarifying the implementation of the excessive deficit procedure (OJ L, 2024/1264, 30.4.2024);
 - Council Directive (EU) 2024/1265 of 29 April 2024 amending Directive 2011/85/EU on requirements for budgetary frameworks of the Member States (OJ L, 2024/1265, 30.4.2024).
- 4 For more details about the content that Member States have to include in their MTFSPs, see the “Guidance to Member States on the Information Requirements for the Medium-Term Fiscal-Structural Plans and for the Annual Progress Reports” (OJ C, C/2024/3975, 21.6.2024).
- 5 More information about the European Semester cycle is available here: https://commission.europa.eu/business-economy-euro/european-semester_en.
- 6 <https://ec.europa.eu/eurostat/web/european-pillar-of-social-rights/information-data>.

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