
Strengthening the capacity of education employers in the European Semester process - Final report

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Glossary

ASGS: Annual Sustainable Growth Strategy

CSR: Country-specific Recommendation

DG: Directorate General

EGD: European Green Deal

EPSR: European Pillar of Social Rights

IDR: In-depth Review

RRF: Recovery and Resilience Facility

Introduction: 10 years of economic governance and social policy coordination

In 2021 the European Semester is 10 years old. During the last decade, the Semester has played a key role in terms of both economic governance and social policy coordination in the European Union. Given its concerns, in both the economic and social spheres, it is unsurprising that education policy is a key focus of the Semester. Many of the Semester's policy recommendations to individual Member States highlight different aspects of education provision, with all sectors, from early years to higher and adult, included. However, despite the importance of the Semester and the central role of education within it, the process remains one that is generally not well or widely understood.

In this report, we set out to explain the purpose and aims of the Semester, as well as to clarify its different processes and its stages of operation. By 'opening up' the Semester in this way, it is hoped that those who represent the education employers' organisations can develop strategic approaches to intervening in the Semester, with a view to influencing education policy Semester outcomes at both the European and national level.

The report opens with a contextual summary of the European Semester which seeks to explain how the Semester was developed, for what purpose, and broadly in what form. This is followed by a more detailed explanation of the Semester process, with a brief overview of all its constituent parts. The Semester has been constantly evolving and is currently the subject of a review that will see further changes from 2023 onwards. However, there are a number of key features and understanding these is central to understanding how the process can be influenced.

The report continues by identifying key actors in the process at both the European and national level, as well as explaining in more detail the different 'points of intervention'. These are associated with different elements of the process, where it is possible for education employers to make an intervention, with a view to influencing the outcomes. In the following section, we set out in some detail the diverse ways in which education features in the European Semester, not least to illustrate the critical role of the Semester as part of the 'European policy space' (Lawn and Grek, 2012).

The report concludes by identifying a range of factors that can contribute to supporting an effective and successful intervention in the Semester process. The Semester is not an easy process to influence without a coherent and considered strategic plan that incorporates a number of different factors which can enhance the prospects of a positive impact. Given the potential benefits, but also the organisational resources involved when intervening, taking all possible steps to maximise the chances of an effective intervention is critical.

The report brings together previously published research material, an analysis of European Union policy documents and the contributions of participants at two online workshops organised as part of this project.

What is the European Semester? A contextual introduction

In considering the genesis of the European Semester it is useful to take the 'Lisbon agenda' (2000) as a starting point. The Lisbon agenda focused on establishing the European Union as the most dynamic and competitive knowledge-based economy in the world. Such an objective placed the development of the single market (including the key role of the Euro) at the centre. However, the Lisbon agenda also committed the EU to secure increased convergence in relation to social standards and recognised that the EU's social dimension was a key element of its objectives. The Lisbon agenda, therefore, although centrally focused on the EU's economic goals, was also concerned with finding an equilibrium between economic and social goals.

It is widely recognised that the Lisbon agenda was overly ambitious and insufficiently focused and that a process of reassessment and prioritisation was required. In the midterm review that followed, economic objectives associated with competitiveness moved centre stage, and the EU's social objectives were correspondingly downplayed. Zeitlin (2008) argued that economic goals and policies formed an 'architectural core' concerning EU governance arrangements, while social policy coordination was to be secured through new governance arrangements (the Open Method of Co-ordination) that were clearly positioned peripherally to the core (Regent, 2003).

In 2010, the European Union committed itself to an ambitious 10-year strategic plan, Europe 2020 and, in many ways, the goals of the plan can be seen as an attempt, once again, to balance between economic and social priorities. However, Europe 2020 was developed in the wake of the 2008 economic crisis, which was global in its scale but had a particularly significant impact on Europe. The economic crisis clearly had an immediate and dramatic impact across Europe, but its effects were experienced particularly sharply in some EU member states. In an economy that was committed to increased integration and convergence, the interdependence of the economies of different Member States was highlighted by the crisis. In the views of the European Commission, the crisis had exposed the vulnerability of the prevailing economic governance arrangements. Hence, in 2011, the European Commission established the European Semester as its principal structure of economic governance to ensure ongoing compliance with EU fiscal rules (Milana, 2020).

The European Semester was, therefore, established in the immediate wake of the 2008 crisis, to ensure ongoing surveillance and monitoring of Member States' adherence to the EU's financial rules, and in particular the requirements of the Stability and Growth Pact. It is unsurprising, therefore, that much of the initial focus was associated with enforcing the management of public finances that in individual countries were experienced as austerity measures. However, the Semester was not intended to simply act as the enforcer of the EU Treaty requirements. It was presented from the outset as a process of both economic governance and social policy coordination that would monitor and report on all the key objectives set out in the EU2020 agenda.

This was arguably not how the Semester was experienced in its early cycles, as the focus was clearly on managing public finances, and it was acknowledged by the Commission that

such an approach made for difficult relations with some Member States (Stevenson et al, 2017). However, as the EU tentatively began to emerge from the economic crisis, it was recognised that the EU's social goals needed to be given a higher priority and this took the form of a 'social turn' associated with the Juncker Presidency (and a commitment to aspire to a 'Social Triple A' status framed as an equivalent to the credit ratings given to countries on the basis of their economic management (European Commission, 2016a)).

The case for the EU's 'social turn' was in part framed as a response to the years of austerity, and the recognition that the European Union needed to demonstrate its value to citizens, in particular as nationalist and xenophobic movements rose in many countries and questioned the EU membership (Vesan, Corti and Sabato, 2021). The centrepiece of the 'social turn' was the establishment of the European Pillar of Social Rights, in which a range of key social indicators was identified, with the expectation that scoring, and publishing the performance of the Member States against indicators would drive the process of upward social convergence (Al-Kadi and Clauwaert, 2019; Milana, 2020).

The 'social turn' was also accompanied by a commitment to reinvigorate social dialogue across the EU, recognising that relations between employees, employers and governments had suffered badly in the years after the crisis. This was particularly the case in public services (including education) where austerity measures were often experienced sharply and where governments had imposed emergency measures that often circumvented collective agreements (Bach and Bordogna, 2013). Hence, the Commission committed to a 'new start for social dialogue' (European Commission 2016b) which was hoped to be driven by improved social dialogue at the national level and to also be reflected in the Commission's commitment to enhance social dialogue at the European level, including in the European Semester (Sabato et al, 2017).

What was particularly significant about these developments, in relation to the European Semester, was that the Semester was to become the central governance mechanism for this agenda. For example, the EPSR would be monitored and reported within the European Semester process, with the expectation that issues identified as problematic in a Member State could then be followed up with recommendations from the Council to the Member State through the Country Specific Recommendations.

The forthcoming country reports will provide an in-depth analysis of all 'critical situations' and additional socio-economic background to better qualify country-specific challenges in the context of the European Semester. This will provide an analytical basis for the subsequent Commission proposals for Country-Specific Recommendations. (European Commission, 2017, p. 21)

The change of the European Commission's presidency at the start of the 2019-2020 European Semester was followed by a set of changes to the original process. The new president, Ursula von der Leyen, committed to tackling gender inequalities, introducing a European Green Deal (EGD) in her first 100 days in the office and ensuring the implementation of the EPSR (Von der Leyen, 2019a).

The EGD is a long-term strategy, released in December 2019, in alignment with the United Nations' Sustainable Development Goals. It aims at the formation of an environmentally neutral Europe by 2050 and constitutes a major part of the Commission's agenda. This strategy was designed to ensure that the United Nations Sustainable Development Goals, introduced in August 2019, will be met (Koundouri, Devves and Plataniotis, 2021). The EGD is also interconnected with the social goals of the EPSR and hence, includes the Just Transition Mechanism to ensure the fair, green and digital transition of all European Countries.

In early 2020 when the Covid-19 pandemic broke out across and beyond Europe, the workings of the Semester were substantially disrupted. At the time, the 2020 cycle had largely run its course, and so the process was little changed. However, it soon became clear that the consequences of the pandemic would not be short term and so the 2021 process was significantly revised (details below). The rapid changes implemented in part reflected different modes of working (for example, restrictions on travel and office working), but also took account of the changes in the economic and social context that the pandemic had presaged. At the heart of these changes was the establishment of the Recovery and Resilience Facility (RRF) as a temporary recovery instrument to help the Member States respond to the immediate economic and social impact of the pandemic. However, the governance arrangements also needed to take account of the introduction of flexibility measures in the Stability and Growth Pact (in March 2020) which had been activated to allow countries to respond as required to the unprecedented economic and social impact of lockdowns.

As Europe emerges, tentatively, from the public health crisis, the Commission's President has announced that current economic governance arrangements will be reviewed. The discussion about a revised framework was launched in February 2020 and immediately suspended due to the pandemic. This is now relaunched following the President's State of the Union address in September 2021 (Von der Leyen, 2021). What seems likely is that new arrangements will take account of the experiences and challenges that have been posed by the pandemic. At the outset of the review, Commissioner Gentiloni asserted:

We are relaunching this review of our economic governance against a backdrop of enormous investment needs, as the climate emergency becomes more acute with every passing year. At the same time, the powerful fiscal support provided during the pandemic has led to higher debt levels. These challenges make it all the more essential to have a transparent and effective fiscal framework. Achieving this is our joint responsibility and is crucial to the future of our Union (European Commission, 2021, para.3).

The timetable for the review begins with a consultation with citizens, organisations and public authorities, open until December 31 2021. The Commission expects to provide guidance to Member States on fiscal policy in the first quarter of 2022 (to support policy coordination and the preparation of Stability and Convergence Programmes) with a view to having a consensus on new arrangements 'well in time for 2023' (Von der Leyen, 2021, p.5).

How does the European Semester work?

The term 'semester' refers to an annual process that is formed in two parts. The European Semester is so called because it can be considered to be a process involving two distinct elements – one at the European level focused on monitoring and reporting, and another at the national level focused on implementation. In reality, the two elements must be considered in a less clear-cut way with different elements running simultaneously and often overlapping.

In its initial conception, the Semester can be analysed according to its key components, presented below.

The Semester 'kick-off' (September)

The process begins formally with the President of the Commission addressing members of the European Parliament with the 'State of the European Union' address. This is presented in September of each year and provides an assessment of the key issues across the EU. It also looks to the future and sets out Commission priorities in the period ahead. It provides both an assessment of the macroeconomic picture across the EU, but also a political assessment of objectives and challenges.

The 'Autumn Package' (November)

Publication of a raft of documents that provide detailed European-level assessments of a range of issues, but also including country-by-country analyses, where necessary. The Autumn package includes:

- *The Annual Sustainable Growth Strategy* – outlines the EU's economic and employment policy priorities for the next 12-18 months.
- *Alert Mechanism Report* – an assessment of economic (im)balances using a scoreboard indicator. Problems flagged by this process may result in a Member State being subject to an In-depth Review (IDR).
- *Draft Joint Employment Report* – an assessment of the employment and social situation in Europe and the policy responses of national governments. The European Pillar of Social Rights is reported within this document. The document is agreed upon later in the cycle.
- *Recommendations for the Euro Area* – recommendations to ensure effective management of the single currency.
- *Commission's opinion on draft budgetary plans for Euro-area countries* – an assessment of the budget plans of Member States with a close focus on compliance with the requirements of the Stability and Growth Pact.

The 'Winter Package' (February)

- *Country Reports* – an assessment for each Member State of its overall economic and social context, including an evaluation of the respective country's progress in implementing Country-Specific Recommendations (CSRs) from the previous year.
- *In-depth Reviews* – arising from Alert Mechanism Reports, IDRs provide detailed reports of macro-economic (im)balances across a wide range of indicators. Where problems exist and persist, sanctions may be applied as determined by the EU Treaties.

The Member State Response (April)

A set of documents submitted to the Commission by the individual Member States.

- *National Reform Programme* – detailed responses by Member States to the Country Reports, but also discussion of the steps taken to address the previous year's CSRs.
- *Stability Programme or Convergence Programme* – three-year budget plans for the Euro area (Stability) and Non-Euro (Convergence) countries.

The 'Spring Package' (May-July)

- *Draft CSRs* – tailored suggestions to individual Member States related to the achievement of the EU priorities identified in the ASGS and related documents. The CSRs are published in a draft form, allowing the Member States to respond.
- *CSRs* - are finalised in the Council in July of each year.

The European Semester – recent developments

In line with the commitment to a sustainable and fair Europe, the originally titled Annual Growth Survey was rebranded as the Annual Sustainable Growth Strategy (ASGS), the publication of which signifies the start of the Semester setting the policy goals for the coming year (Government of the Czech Republic, 2019). Sustainability has become a crucial aspect of the Semester and Sustainable Development Goals need to be identified in the Countries' Reports from 2019 onwards (European Commission, 2019a).

During the 2019-2020 Semester, the changes due to the Covid-19 pandemic were not substantial. The alterations referred to the simplification of the information required from the Member States and an effort to address the impact of the crisis in the CSRs. Moreover, as indicated, the flexibility measures in the Stability and Growth Pact were activated in March 2020, which allowed a temporary departure from the budgetary requirements for the Member States, emphasising the need for recovery. Priority areas of the CSRs during this Semester cycle were identified as healthcare systems and social crisis, technology and innovation investments and the stabilisation and preservation of the single market.

On the other hand, the changes in the 2020-2021 Semester process were substantial and were mainly linked to the European Union's effort to facilitate the recovery and resilience of the Member States (Sabato and Mandelli, 2021). NextGenerationEU, a temporary recovery

plan introduced in 2020, became a central part of the Commission's agenda. This plan was designed in agreement with the EGD goals. The centrepiece of this plan was the RRF, which provided financial support to the Member States. This financial support aimed to ensure that they recover from the damage caused by the pandemic and that they built on a better future through sustainable reforms and public investments. The introduction of the RRF had direct effects on the Semester, redirecting its focus and altering the content of its cycles (European Commission, n.d.b).

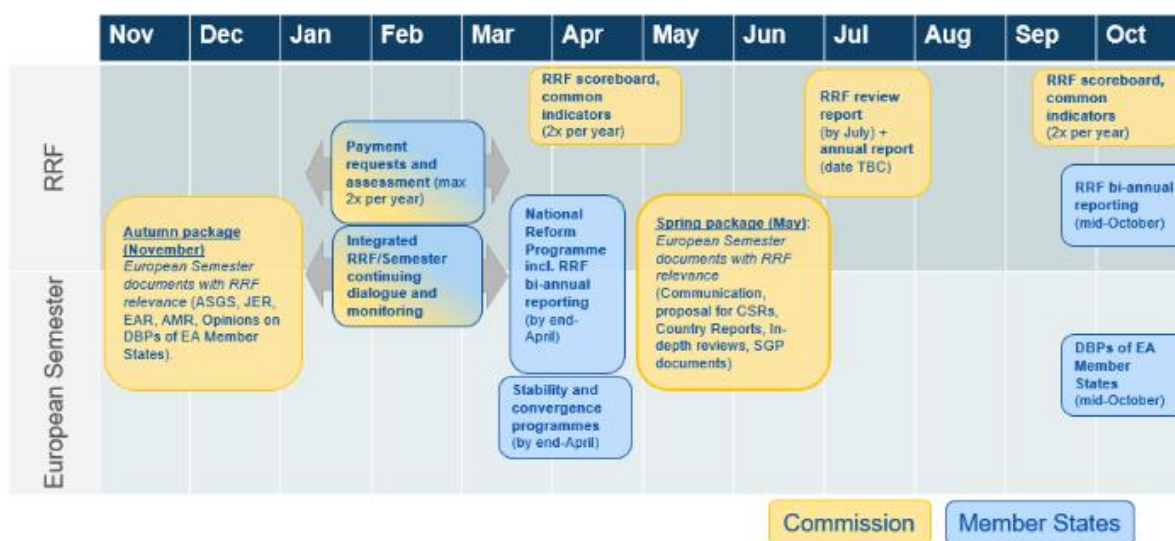
The changes in the Semester were linked to a transformation of both its procedures and its final outputs, with some researchers doubting that the process will return to its original form (Sabato and Mandelli, 2021; Vanhercke, Spasova and Fronteddu, 2021). Due to the urgent need for support and recovery, the ASGS 2021 was published earlier than usual. Moreover, the European Council acknowledged 'that it is necessary to temporarily adapt the European Semester to ensure consistent and effective implementation of the RRF' (Council of the European Union, 2020a, p.3). Hence, the Country Reports, where member states reported the progress of their reforms and budgetary decisions, were replaced by the Recovery and Resilience Plans. In these analytical documents, the countries were expected, until spring 2021, to present their recovery plans combined with their National Reform Programmes. The spring package of the 2020-2021 Semester was also affected. Exceptionally, the publication of CSRs was replaced by economic coordination suggestions for the countries that submitted Recovery and Resilience Plans (Council of the European Union, 2020a; Vanhercke, Spasova and Fronteddu, 2021).

The European Commission has referred to the 2021 Semester as 'an exceptional cycle' and it is the case that it assumed an appreciably different form to previous iterations. However, the Semester has always been evolving throughout its relatively short history, and the review of governance arrangements indicates it will continue to change. It is important, therefore, to continue to engage with the process, in order to be aware of developments, and potential impacts on opportunities for participation.

The European Semester – the 2022 cycle

At the launch of the Autumn Package in 2021, the European Commission announced its plans for managing the 2022 Semester cycle. After the 'exceptional' experience of 2021, the 2022 cycle is intended to return to the Semester's traditional focus on economic and employment policy coordination, while also recognising the implementation requirements of the Recovery and Resilience Facility. At the launch of the ASGS, the Commission signalled its intent to move on from the immediate crisis caused by Covid and to increasingly focus on laying the foundations for an inclusive recovery based on resilient, competitive and sustainable economies.

The integration of the European Semester process and the Recovery and Resilience Facility is best illustrated in the following graphic:



Source: The 2022 European Semester cycle¹

Specific changes proposed for the 2022 cycle, which given the economic governance review must be considered as transitional, include:

National Reform Programmes and stability/convergence programmes will be produced as previously. However, the NRP will perform a dual role acting as one of the key reporting documents for the Recovery and Resilience Facility, as well as being part of the Semester process.

Streamlined **Country Reports** will be published in May 2022. The broad analysis of economic and social developments will include an assessment of the implementation of the EPSR. Issues in the EPSR that have not been adequately addressed in the Recovery and Resilience plans will be highlighted. Where countries are subject to In-Depth Reviews, through the Macroeconomic Imbalances Procedure, outcomes will be reported through the Country Reports.

Proposals for **CSRs** will be published in May 2022 for presentation to the Council. The recommendations will reflect the findings of the Country Reports (and IDRs where relevant) and identify areas where policy action is required.

There will be continued integration of the Sustainable Development Goals into the European Semester process. The annual SDG Monitor Report will be reported as part of the Spring Package and individual Country Reports will contain a section dedicated to reporting progress relative to the SDGs.

¹ https://ec.europa.eu/info/business-economy-euro/economic-and-fiscal-policy-coordination/eu-economic-governance-monitoring-prevention-correction/european-semester/european-semester-timeline/2022-european-semester-cycle_en

The European Semester: identifying the key actors

The European Semester is best understood as a process that is both political and technical-bureaucratic; hence, different types of policy actors are involved at different stages in the process.

The **President of the European Commission** presents the State of the Union address to Members of the European Parliament. However, it is widely recognised that MEPs have a relatively minor role in the Semester process.

The process itself is managed by the Commission's **Secretariat-General** that is responsible for guiding the process through its respective stages. However, the **Directorate-General for Economic and Financial Affairs** (DG ECFIN) has the most influential role in the process, reflecting the central importance of economic monitoring and surveillance in it. Most reports, including the key Country Reports, are drafted by country teams comprised of members from several Commission Directorates (DGs). For example, a country team may include a representative from the DG **Education, Youth, Sport and Culture**, who may also be responsible for producing non-Semester documents such as the Annual Education and Training Monitor for the respective country.

The Secretariat General has a **European Semester Officer** for each Member State. These people are usually based in the Commission's office in the respective country (some officers cover more than one country) and they provide a key link between the progression of the Semester process in Brussels and the way it is experienced in the Member State. A key role of the European Semester Officers is to organise events/activities designed to engage citizens and organisations in the Member States in the Semester process.

National governments are clearly involved in the process at various points. Ministry officials have a key role to play in submitting information for the preparation of Country Reports and during the fact-finding visits by Commission officials. Mirroring the Commission's activities, the key players are the **Ministry of Finance** (or equivalent), but other Ministries also feed into the process. The Ministry of Finance officials usually take the lead role in preparing the National Reform Programmes, although again, Ministries such as Education can be expected to be involved in drafting the relevant sections of the National Reform Programmes. At this point, it is usual for the Member States to present the National Reform Programmes to **National Parliamentarians**. These arrangements can differ widely between countries and will often depend on the arrangements that exist for overseeing EU affairs.

Social Partners and **civil society organisations** are both involved at different points in the process and at different levels. Social Partners, such as representatives of employer and employee organisations, have a particular status in the EU as the founding treaties make formal provisions for social dialogue. European-level social dialogue within the European Semester takes place mainly during the Autumn package when European-level confederations of employers' and employees' organisations are consulted over the ASGS. The same organisations are involved in discussions about the Draft Joint Employment

Report. National-level social partners are usually involved in the later stages of the process when the focus shifts to national policy development and implementation.

Civil society organisations representing a broad range of interests are also often involved in the process, sometimes mirroring the types of involvement described for social partners. However, civil society organisations do not enjoy the same formal status as social partners and therefore, their experience of involvement in the process is likely to be more variable.

Making a difference through the European Semester: identifying the points of intervention for education employers

The European Commission is committed, by its Founding Treaties, to facilitating social dialogue in key areas of economic and social governance. The Commission has specifically recognised that there is an increased need for social dialogue *within* the Semester itself, as well as for the enhancement of the social dialogue in other aspects of economic and social policy *through* the Semester process (i.e. through CSRs and the EPSR). In this section, we highlight the opportunities that exist for education employers to intervene in the Semester. In presenting this analysis we recognise the diverse nature of employers' organisations, as some employers might be Government Ministries and some are separate and independent organisations. This shapes the type of social dialogue that is possible.

During the period of the Autumn package, much of the social dialogue exists at a high level and is conducted through the European-level confederations of employers and trade unions, such as the BusinessEurope and the European Trade Union Confederation. Education employers at this level are typically represented through the European public services employer organisation, CEEP. These organisations feed in commentary on the ASGS and education social partners typically participate in this process through their European-level confederations.

The next significant stage in the process is the drafting of Country Reports. In reality, work commences on these reports much earlier than might appear the case when the Semester is looked at as a series of discrete stages. However, it is still the case that the fact-finding visits to the Member States are a key opportunity for social partners to input into the Commission's thinking and analysis. These visits take place in December and are organised by the local European Semester Officer. The visits are relatively short, and the officials' schedules are busy. Often employers and trade union organisations are seen together in a single meeting. Education sector social partners are not always included in these visits, and where this is the case, it is important for education employers to ask to be involved. This is how it is possible to assert some influence over the Country Report and this is the key agenda-setting document for each individual country. Hence, it has a key influence on later stages in the process. For example, no issue will appear as a CSR that has not appeared in the Executive Summary of the Country Report.

When Country Reports are published (in February) there is often a presentation, arranged by the Commission, to an invited audience, in which the Commission officials present the key issues contained in the Report. This is again organised by the European Semester Officer, who should be contacted to see if such an event is organised and to secure an invitation. A draft version of the Report is also presented to the government, but if the education employer is not the Ministry, it is not possible to see the Country Report prior to publication.

The next significant opportunity to participate in the European Semester process is as the National Reform Programme is drafted. The Programme represents the response of the national government to the Country Report, and the previous year's CSRs. Again, employers

who are Ministries are intimately involved in this process, but where employers' organisations are separate from the Ministry then access can be more variable. Getting access to a draft of the National Reform Programme is considered important, allowing consultations to shape the final document. However, the individual nature of these arrangements can vary significantly between countries and it is up to employers' organisations to establish what their local arrangements are, and how they can be accessed. The Commission encourages social dialogue at this stage of the process but considers the detail of the format to be a matter of local decision-making. It does not specify any format for adoption by the Member States.

Following the submission of the National Reform Programme, the Commission publishes its draft CSRs. The term 'draft' may imply the CSRs are open for consultation, but by this time the process is very well advanced and any political discussions are taking place at a very high level. There are very few examples of draft CSRs being amended and amendments are likely to have been the outcome of representations at the highest level.

In presenting the above, we have outlined the formal opportunities that exist for education employers to engage in the social dialogue within the European Semester process. What has been identified in previous research (Stevenson et al, 2017; Stevenson et al, 2020) is the importance of informal relationships with key officials in the Commission and Ministries. For example, a good working relationship with the European Semester Officer has obvious value, but sometimes it is possible to make connections with the Directorate-General EAC official also. Given the direct role of the latter in policy development, this can be an important relationship to establish.

Why should education employers intervene in the European Semester? Education matters.

The European Semester is a mechanism to ensure fiscal compliance with EU Treaties and is primarily a system of *economic governance*. However, it is also a process of *social policy coordination*, with education playing a key role. Indeed, it is possible to argue that education policy is uniquely placed to bridge the economic and social objectives of the EU. Education is central to building the skills that are essential for economic prosperity, but also ensuring people develop as critical and active citizens in a democracy.

The joint policy debate between ministers of finance and education stressed that investment in education and training supports economic growth and equality and hence, can reduce future spending on employment and social services in the long term (Council of the European Union, 2019). Keeping in mind the crucial role of education, processes and instruments related to the European Semester, like policy debates, committees and monitors, engage in the process of shaping benchmarks and resolutions for education and training in the European Union (Council of the European Union, 2020b).

A central instrument of the EU's education policy agenda is its Education and Training Monitor, a strategic framework launched in 2009. The Monitor sets benchmarks and goals regarding education and training for the Member States. It is important to note that the Education and Training Monitor is *not* formally a part of the European Semester. However, Agostini and Natali (2015) argue that for the achievement of the EU's educational goals, the European Semester process is central and the link between the Semester and the Monitor is crucial. Data collected through the Education and Training Monitor is a key driver when informing the content of the CSRs.

The role of education in the Semester process was explicitly stated with the Council Resolution on Education and Training in the European Semester (Council of the European Union, 2020b, p.1), published in 2020, asserting it is 'important to enhance the contribution of the education and training sector in European Semester discussions'. Hence, ASGSs always refer to education and training goals (Vanhercke, Spasova and Fronteddu, 2021). Specifically, the ASGS 2020 indicated that 'economic growth is not an end in itself. An economy must work for the people and the planet.' In this context, education is identified as a priority area, since investment in education and research can benefit both the labour market and the society (European Commission, 2019a). Four goals are identified as central for education and training in the European Union: sustainability, digitalisation, justice and equality. To achieve these goals, policy recommendations focus on the re- and up-skilling of the future and current workforce, the improvement of the inclusiveness and quality of the education systems and the boosting of vocational education, lifelong learning and education outcomes (Council of the European Union, 2020b).

The ASGS 2021 was founded on the same four dimensions as the ASGS 2020 and hence, is in alignment with the EGD and the EPSR. However, in the ASGS 2021 extra emphasis is put on the implementation of the NextGenerationEU instrument and the RRF. The RRF, introduced to tackle the adverse effects of the COVID-19 pandemic, presents seven flagship themes:

power-up, renovate, recharge and refuel, connect, modernise, scale-up, reskill and upskill. Of those themes, at least one (reskill and upskill) is directly linked to education and training policies, while others are indirectly linked to education and research advancements (European Commission, 2020c; n.d.a).

The 2021 Semester prioritises the recovery from the crisis caused by the COVID-19 pandemic and aims at improving the future of the next generations. Therefore, education and training remain an area of focus, as they facilitate the recovery and a just, green digital transition for all European countries (European Commission, 2020a; Koundouri, Devves and Plataniotis, 2021). As mentioned in the ASGS 2021, the digital transition of the European member states 'requires reforms in basic and higher education, skills and lifelong learning to support a labour market in transition and to develop and deploy key digital technologies and shape EU's digital future' (European Commission, 2020a, p.8).

The central importance of education to the EU, and within the Semester, has also been reinforced through the Von der Leyen presidency. According to Vesan, Corti and Sabato (2021), the presidency of the European Commission has gradually started to play a more important role in the coordination of social and employment policy in the European Union. The presidents become more central in the decision-making processes and the formulation of the policy agenda. Therefore, their influence on the European Semester process is important. Ursula von der Leyen took on the European Commission presidency in late 2019. According to her statements and relevant research, the main focus of the current president is on sustainability, gender equality, fairness and digitalisation (Abels and Mushaben, 2020; Sabato and Mandelli, 2021; Von der Leyen, 2019a; 2019b). The president aims at 'creating a fairer and more equal Union' and to 'refocus our European Semester to make sure [it] stays on track with our Sustainable Development Goals' (Von der Leyen, 2019b, p.2,3). Hence, during her first days in the office, she proposed the EGD, integrating the Sustainable Development Goals into the Semester (Sabato and Mandelli, 2021). She also committed to the implementation of the EPSR and the empowerment of the single market area through sustainability and stability (Von der Leyen, 2019a).

In pursuit of the above goals, the president highlights the importance of providing education and training for all, securing mobility, 'bringing down barriers to learning and improving access to quality education' (Von der Leyen, 2019a, p.14). Proposed changes also include the existence of better and more accessible early years education in the Member States, lifelong learning opportunities and a focus on skills development. Envisioning a just green and digital transition, the president also stressed the importance of investing in research and innovation (ibid.).

The profile of education within the Semester is best illustrated through an analysis of the CSRs, although it can be a mistake to place too much emphasis on the content of CSRs, and not recognise other points in the process where education features prominently and can be influential.

Given the 'exceptional' and untypical nature of the 2021 Semester the two most recent years that can be analysed are the 2019 and 2020 European Semesters. Analysing CSRs for education content is inevitably slightly arbitrary, as there is no clear distinction of

education-related CSRs in the European Commission documents. Therefore, the choice of the respective CSRs by the researchers involves judgements that may be contested. The following sub-sections include a brief presentation of the content and the position of education-related CSRs in the Semester process.

Analysis of the 2019 CSRs

The Semester cycle 2018-2019 concluded with the publication of the 2019 CSRs which were to be implemented by member states in the years 2019 and 2020 (European Commission, 2019b).

The Spring Package of the 2018-2019 Semester included in total 98 CSRs which were addressed to the 28 member states participating in the process. The number of recommendations for each state varied from 2 to 5, with most of them receiving 3 CSRs. From the 98 CSRs, 47 (47 out of 98, around 48%) included suggestions relevant to education policy and investment. Therefore, almost half of the published recommendations' content was related to education and training issues. Moreover, all countries received at least one CSR that was directly related to education and/or training. This highlights the fact that education is a priority in the Commission's agenda.

Further analysis of the content of the education-related 2019 CSRs is presented in Table 1. For most countries, CSRs focus on skills development and investment in research and innovation. Most recommendations suggest a closer link between education and the market, through improving vocational education, developing skills for employability, and introducing labour market-related education. However, there is also a strong presence of recommendations focusing on social fairness, through equal access and inclusion in educational systems, accessible childcare services and the upskilling of disadvantaged groups.

Table 1: Areas of focus of 2019 education-related CSRs

Area of Focus		Countries
Equality of access and inclusion		BE, BG, HR, CZ, FI, HU, MT, RO, SK (9)
Quality education		BG, HR, CZ, LV, LT, PL, RO, SK (8)
Labour market-relevant education and training		BG, HR, EE, PT, RO, SI (6)
Improvement of education outcomes		BE, DE, HU, IT, ES (5)
Childcare services provision		AT, CY, CZ, IE, IT, PL, SK (7)
Promotion of lifelong learning		LV, LT, NL, PT, SI (5)
Skills development	<i>Skills for disadvantaged and vulnerable people</i>	AT, DE, IE, NL (4)
	<i>Digital Skills</i>	BG, CY, IT, PT, RO, SI (6)
	<i>Upskilling to increase employability</i>	BE, BG, CZ, EE, FI, FR, EL, HU, IT, LU, PL, SK, ES, SE, UK (15)

Investment in Education and Training	DK, DE, EL, SE (4)
Investment in Research and Innovation (<i>emphasis on digitalisation</i>)	AT, BE, BG, HR, CY, DK, EE, FI, DE, EL, HU, IT, LU, MT, NL, PT, SK, SI, ES, SE, UK (21)
Promotion of Vocational Education	CY, LV, LT, RO (4)
Other	CY, CZ, PL, PT, ES (5)

Analysis of the 2020 CSRs

The Semester cycle 2019-2020 concluded with the publication of the 2010 CSRs which were to be implemented by member states in the years 2020 and 2021 (European Commission, 2020b).

The total number of the published CSRs for the 28 countries involved in the European Semester Process reached 104. The number of recommendations for each state varied from 2 to 5, with most of them receiving 3 CSRs. Around one-third of these CSRs (35 out of 104, 33.65%) included recommendations directly linked to education and training. Only two of the countries (*LU, UK*) did not receive any education and/or training related CSRs. Compared to the 2019 CSRs, we can identify a decrease in the number of education-related CSRs in the 2019-2020 European Semester. This can be attributed to the effort of the Commission to focus on the healthcare and economic crisis caused by the COVID-19 pandemic.

Table 2 illustrates the areas of focus of the 2020 education-related CSRs, for a deeper understanding of their content. Most of the education and training CSRs are closely connected to the EGD and its aim for a just green and digital transition. They emphasise digitalisation and sustainability, through digital learning provision, relevant research and the development of a set of skills for the workforce. Social fairness remains an aim in this context, through the effort to involve social partners in the decision-making, which is mentioned in many CSRs, and to achieve equality and inclusion in the educational systems. Concluding, it can be stated that although the EPSR remains a priority in the Commission's agenda, more emphasis is now put on the implementation of the EGD, which was introduced by the new president, Ursula von der Leyen, in late 2020.

Table 2: Areas of focus of 2020 education-related CSRs

Area of Focus	Countries
Equality of access and inclusion	AT, BG, MT, PT, RO, SK (6)
<i>Address the digital divide</i>	IE (1)
Quality education	HU, IE, MT, PT, SK (5)
Labour market relevance of education and training	CY (1)
Digital and Distance Learning Provision	AT, CZ, HU, IT, PT, RO, ES (7)

Skills development	<i>Digital Skills</i>	BG, CZ, IT, NL, PL, SK, SI (7)
	<i>Upskilling to increase employability</i>	BE, HR, CZ, FR, EL, IE, IT, LV, LT, MT, RO, ES, SE (13)
Investment in education (green and digital transition)		DE, SE (2)
Investment in research and innovation (green and digital transition)		BE, CY, DK, EE, FI, FR, DE, HU, IE, IT, LV, MT, NL, SI, ES (15)

Ensuring effective interventions in the European Semester

The European Semester is a technical and complex process that is fundamentally driven by the imperatives of the EU's financial aims and the need for effective economic governance. However, it is also a political process in which outcomes are open to influence through the actions of relevant policy actors, including social partners. The European Commission's own commitment to social dialogue has also been asserted in the specific context of the European Semester.

Although the European Semester as a process is not always well or widely understood, there are a small number of recent studies that have sought to understand the process and identify what factors can maximise the potential influence of interventions by social partners and others (see for example the project coordinated by EPSU '*Public Service Trade Unions: Effective Intervention in the European Semester*' – all reports plus five country case studies available online²). What follows is a summary of the issues that have been presented in these studies, but also factors that were identified and raised by participants in the project workshops:

Develop a strategic plan, with long-term objectives

As a large, complex process that seeks to reconcile a number of competing priorities, the Semester is not responsive to interventions that appear disconnected from wider discussions in the process. Reactive interventions are likely to be ineffective. A strategic plan involves *identifying a core issue(s) and focusing resources on promoting that issue*. Such a plan should extend over more than a single cycle. If objectives are not achieved initially, then subsequent interventions in the following cycle(s) need to build incrementally on previous interventions.

Connect with EU agendas and find common ground

The European Semester provides an important mechanism for the European Commission to promote strategic priorities and to seek coherence and convergence across the Member States. Interventions into the Semester are more likely to be successful when they *speak to the priorities reflected in the Commission's agenda*. Securing some alignment between the Commission's goals, and the aspirations of education employers at the national level is more likely to prove effective. The Commission's agenda is framed as a policy response to societal challenges (inequalities, skills gaps etc.) and interventions that make constructive contributions to tackling those challenges are more likely to be positively received.

² <https://www.epsu.org/article/more-effective-trade-union-involvement-european-semester>

Link European- and national-level interventions

As social partners, education employers operate at both the European and Member State levels. Effective interventions in the Semester are more likely when key priorities are raised at multiple levels in ways that are mutually reinforcing. Social dialogue at the European level has the potential to amplify within the EU those issues that are key concerns for employer organisations in the Member States. Ensuring there is *alignment between these agendas* and that interventions are coordinated correspondingly helps secure impact.

Develop alliances and build relationships

As employers of those who work in a strategically critical sector, employer organisations have the potential to be significant actors in the Semester process. However, all actors are one voice among many and *strategic alliances* provide important opportunities to strengthen the collective voice of employers. Such alliances can take many forms, and will also be determined by the nature of the organisation (an employer organisation that is a Ministry will work in a very different context to one that is independent of a Ministry). In previous studies, a number of alliances have been identified with other social partner organisations (including trade unions where appropriate), civil society organisations (some of whom have organised effective Semester interventions) and Ministry officials.

In addition to the alliances identified above, it is also important to highlight the importance of developing effective relationships with Commission officials. *European Semester Officers* are the 'gateway' into Semester discussions, but it can also be possible to make direct links with Commission officials from relevant Directorates.

Identify where to intervene and for what purpose

It is important to recognise that intervening in the European Semester can focus on *influencing either the European Commission, or Member State governments, or both*, but that the focus determines the intervention. Interventions that focus on influencing the Commission's thinking at Member State level need to focus on the Country Report. This is the crucial document that sets out the key issues and identifies the challenges of each country. Influencing how issues are framed in the Country Report has the potential to feed into the subsequent stages of the process. This is the part of the Semester cycle that is most open to influence. It requires education employers to have identified the relevant issues well in advance of the country visits in December.

In contrast, interventions aimed at the national level need to be directed at influencing the National Reform Programme. How the NRP is dealt with by the Member States can vary significantly between countries, as each has its own governance arrangements.

Frame the narrative – provide the evidence

The European Semester is both a political and a technical-bureaucratic process and an effective intervention strategy must address both these elements. At a political level, it is important to locate interventions within a wider narrative that speaks to the key challenges that confront the Member States and the broader goals of the European Union. What is the problem that proposed policy reforms will address, and why does this particular problem need to be treated as a priority? How do the proposed policy reforms connect with European Union objectives and how do they contribute to supporting a coherent and integrated policy agenda when linked to other policy initiatives? How do the proposed reforms link to, and contribute to reinforcing European Union values? These are some of the questions that can help ‘frame a narrative’ within which specific reform proposals are then located.

However, such a narrative also needs to be supported by an evidence-based approach to policy development in which the argument in principle needs to be accompanied by relevant data. Is there evidence that helps to understand the nature and scale of the problem? Is it possible to quantify the resource implications of proposed initiatives and is there evidence that can support a cost-benefit justification for the proposal? Where organisations are small it can be difficult to generate the type of evidence identified here, particularly in a form that is robust and reliable, but submissions that contain such detail are more likely to be effective. Where collecting such data is difficult, it can be helpful to make use of secondary datasets, or to combine with other organisations with shared aims to commission primary data where appropriate.

Effective interventions in the European Semester: making a difference

Seeking to influence a large and complex process such as the European Semester requires a strategic approach that incorporates the elements identified above. Arguably the starting point is to develop a deep understanding of the Semester in terms of both its aims and its processes. The Semester is a framework that works at both an ideational and organisational level. At one level it helps to construct a reality that frames how particular societal challenges and problems are conceived, and at another level, it generates the policy reforms that are presented as responses to those problems. The Semester is a central element of the European Commission’s governance architecture because of the way it combines both economic and social agendas within the European Union and acts as both a monitor of economic performance and a co-ordinator of social policy agendas. The location of the EPSR within the Semester has consolidated the social role of the Semester.

Education is uniquely placed to address both the economic and social agendas of the European Union and so education is always likely to occupy a central role in Semester reforms and recommendations. This role requires the involvement of key stakeholders to ensure effective policy development and implementation, with social partners occupying a pivotal position in such dialogues. The challenge is to open up the opportunities provided by the prevailing context and intervene in ways that can use the Semester to shape education reform at a European and national level. Key to achieving these objectives is the need to develop a long term plan, with actions focused on making timely and targeted interventions. Such interventions will be most effective when education employers can connect their national and European level contributions in ways that align with EU agendas. Such interventions are also likely to be enhanced when alliances are formed with others to amplify the case being presented.

When these factors combine, the possibility of making an effective, constructive and productive intervention into the European Semester process is increased, with the possibility of having a meaningful influence on education policy development at both the European and Member State level.

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