EDUCATION TRADE UNIONS FOR THE TEACHING PROFESSION:

STRENGTHENING THE CAPACITY OF EDUCATION TRADE UNIONS
TO REPRESENT TEACHERS' PROFESSIONAL NEEDS IN SOCIAL DIALOGUE

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Teachers' professional needs in social dialogue

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CONTENTS

EXECUTIVE SUMMARY

INTRODUCTION: KEY ISSUES

It is widely acknowledged that the quality of any education system depends crucially on the quality of its teachers. This highlights the need to create the conditions in which teaching as a profession can:

- **Recruit** and prepare high quality entrants

- **Retain** entrants in the teaching profession

- **Develop** teachers throughout their career

MEETING TEACHERS' PROFESSIONAL NEEDS: WHAT GOES WRONG?

Previous studies, as well as data generated in this research, provide substantial evidence of the significant problems faced by teachers in their attempt to secure access to high-quality professional and career development. In general, teachers encounter two types of problems:

- **Inadequate access to professional development**. All too often teachers are not able to access high-quality professional development because it is simply not available. Public expenditure on education has been badly affected by the economic crisis and investment in training and development has often been an easy target for cuts. Teachers have few contractual safeguards that guarantee them both access to professional development and the time to undertake it. Teachers often undertake professional development in their own time and at their own expense.

- **Poor quality and inappropriate professional development**. Where professional development is available, it is often driven by the needs of the employer and government priorities. Teachers are not able to determine their own professional needs and have little control over their own professional development. Professional development can be experienced as irrelevant and an imposition, driven by external pressures and performance management targets.

EDUCATION TRADE UNIONS MEETING TEACHERS' PROFESSIONAL NEEDS: FIVE UNION STRATEGIES

Despite policy rhetoric which reflects a commitment to investment in teachers' professional development, there is ample evidence that teachers experience limited opportunities for professional learning and have limited influence in shaping their own professional development. The need for a meaningful, independent voice at policy and practice level suggests that education trade unions can make a significant contribution to the professional learning and development needs of their members. This research shows that education trade unions already play an important role in addressing the professional issues experienced by teachers. It highlights five complementary strategies:

1. **Developing an extended bargaining agenda: the importance of social dialogue**. Building professional issues into social dialogue processes ensures that teachers have a genuine independent voice to represent them and that contractual safeguards embed and protect teachers' rights to professional development.

2. **Meeting teachers' professional needs: educating the educators**. Education trade unions play a key role in ensuring teachers' access to professional development by providing professional learning opportunities independently or in partnership with others.

3. **Facilitating self-organising**. Engagement in teachers' professional needs opens up opportunities for self-organising in which union members work together to identify and address their own professional needs. Such approaches support individual teachers but also help build the collective capacity of the union organisation.

4. **Shaping the discourse about quality education and support for the teaching profession**. Education trade unions act as advocates for quality education and investment in education as a public good. This work performs a vital role in framing the narrative about public education and can help shift popular thinking about investment in the resources required to address the problems identified in this report.

5. **Building alliances and developing partnerships**. Education trade unions work with a wide range of governmental and non-governmental bodies to ensure teachers' professional needs are addressed.

MEETING THE PROFESSIONAL NEEDS FOR TEACHERS: A VITAL ROLE FOR EDUCATION TRADE UNIONS

This research emphasises the vital role played by education trade unions in meeting the professional needs of teachers. It highlights three key reasons why education trade unions should seek to address teachers' professional needs and make this a strategic priority in their work.

1. **Supporting teachers' career and professional development**. Professional development is vital to career progression and therefore a central trade union concern.

2. **Unions as the teachers' voice at work**. Union members expect the union to be their voice on all the key issues that impact them in their daily work as teachers. There is no simple separation between 'industrial' and 'professional' issues – a teacher's experience of work is invariably a mixture of both. Unions exist to give voice to employees in relation to the totality of their experience as workers.

3. **Building and strengthening the union**. A focus on professional issues enables unions to engage members who otherwise might not participate in union activity. Developing member engagement and connections builds union identity amongst the membership and strengthens the organisation. Such work develops the activist base of the union.

1. INTRODUCTION

This report presents the findings of research undertaken for the project: *Education Trade Unions for the Teaching Profession: Strengthening the capacity of education trade unions to represent teachers' professional needs in social dialogue (VS/2016/0248).*

The research is focused on the different ways that education trade unions can support their members by ensuring that their professional needs as educators are met. Research evidence has consistently shown that the quality of teaching is the single most important in-school factor that influences student achievement. It is widely argued that the quality of any education system cannot exceed the quality of its teachers (Barber and Mourshed 2007; Schleicher 2016). That teachers matter (OECD, 2011) points inevitably to the need to:

- **Recruit** high quality entrants into the teaching profession, and provide them with the knowledge, skills and competences necessary to enter teaching as effective practitioners.

- Create the working conditions that will help **retain** teachers in the profession and maintain their motivation throughout their career.

- Ensure that teachers have access to appropriate professional learning opportunities and the opportunity to **develop** throughout their careers.

However, while research evidence is unambiguous about the importance of teachers and the need to support teachers' professional development, it also reveals that many teachers are not receiving the support they need to perform their work effectively or to adapt to rapidly changing conditions. Such a situation highlights the essential role that education trade unions can play in making sure these issues are addressed.

In order to be effective educators, teachers must acquire and develop the necessary knowledge, skills and competences and it is this process of development that frames our approach to defining the 'professional needs' of teachers. Any initiative focused on meeting teachers' professional needs is a process committed to developing further the knowledge, skills and competences required for practitioners to work effectively in their specific organisational and cultural context. In this report, the terms we use to describe these initiatives are 'initial teacher training' and ' continuous professional development'. We have employed the term 'training' rather than 'education' as the former is most widely used and recognised in the European policy context. It does not denote a preference for one term over the other, but we understand that some could consider this choice problematic. Given the wide range of terms used in policy and research literature, the terms 'professional learning' and '(continuing) professional development' are also used interchangeably. When referring to the wide range of policies that impact teachers such as teacher initial and continuous professional development, performance evaluation and pay we use the term 'teacher policy' which is a term frequently used by leading policy organisations.

Teachers' professional needs can clearly be addressed in myriad different ways. In this report, we draw on a definition of teacher initial and continuous professional development offered by Michael Fullan that captures this diversity in form and provision effectively:

> *"The sum total of formal and informal learning experiences throughout one's career from pre-service teacher education to retirement."*
> *(Fullan, 1991: 326–327)*

At this point, it is important to note that the term 'professional needs', when used in the context of teachers' work, is not politically neutral. 'Professional needs' can emerge from a number of sources including teachers' self-reflection, wider discussions within the teaching profession and the academic discipline of education, and external political considerations determined by, for example, governments. The demands and expectations of the latter have become more explicit as accountability frameworks take on increasing significance in many contexts. In this study, we are interested in how education trade unions help address teachers' professional needs but, in focusing on this issue, we also recognise the importance of questioning *who decides what teachers' professional needs are* and *how* those needs are addressed. Recognition of the extent to which issues relating to teachers' professional needs are political (Cochran-Smith, 2005) and are nested within wider debates about the aims and purposes of education is always important, but is of particular necessity during a period of acute social and economic crises when solidarity in Europe is being challenged.

2. A EUROPEAN POLICY CONTEXT: PROFESSIONAL POSSIBILITIES AND POLITICAL CHOICES

European education systems are diverse in form and reflect a multiplicity of context-specific factors relating to history, culture, economy and governance. Given the complexity, we have made no attempt to provide an overview of how these systems differ. Such detail is notoriously difficult, even in projects dedicated to the task (Snoek and Žogla, 2009). However, for the purposes of this report, we set out some important areas of divergence and convergence in relation to teacher policy across Europe in order to provide important contextual information.

Hargreaves and Fullan (2012) have argued that, despite high-level consensus on the correlation between quality education systems and quality teachers, there is no agreement on how teachers should be supported and developed to achieve 'quality' in their work. These authors identify two sharply divergent models of teachers' work and development: the business capital model and professional capital model. The differences can be summarised as follows:

Business Capital Model	Professional Capital Model
Emotionally demanding but technically simple	Technically sophisticated and difficult
Requires only moderate intellectual ability	Requires high levels of education and long periods of training
Difficult initially, but easily mastered	
Driven by data about 'what works'	Developed through continuous improvement
Depends on enthusiasm, raw talent and hard work	Based on wise judgement, informed by evidence and experience
Often replaceable by technology (e-learning)	
	Reflects collective effort and experience
	Maximises, mediates and moderates online instruction

Figure 1: Hargreaves and Fullan: models of teacher development
Adapted from Hargreaves and Fullan (2012, p.14)

We highlight this analysis by Hargreaves and Fullan because it is helpful in setting out two very different trajectories of teacher policy. These two models have significant implications for how teachers experience their work, how they are supported in their work and what it means to be a member of the teaching profession. However, both approaches exist in Europe. Hargreaves and Fullan (2012) point out that the business capital model – or market-based approach – is most advanced in England but is

also apparent in variant forms in several other European countries. Moreover, as the legacy of the 2008 financial crisis continues to impact educational investment, elements of the business capital model may be adopted more widely, albeit unenthusiastically, in the European region.

The more common model recognises the importance of public investment in teacher initial and continuous professional development and seeks to provide the necessary policy mechanisms to make this happen, even if policy outcomes do not always reflect policy aspirations. Emphasising the development of professional capital, this approach may be considered more orthodox in most European countries (notwithstanding Snoek and Zogla's (2009) warning to avoid oversimplification in the search for a 'European model') and, arguably, underpins European Union (EU) recommendations on teacher training and professional development[1] .

The 2000 Lisbon Council conclusions highlighted the importance of investing in people to the future jobs, growth and competitiveness of the European Union. In the transition to knowledge economies, Member States would need to modernise their education and training systems (Council of the European Union, 2000) and subsequent policy recommendations addressed the teacher's role in this improvement. For instance, a 2007 Communication *Improving the Quality of Teacher Education* stated that the quality of teaching was 'one key factor in determining whether the European Union can increase its competitiveness in the globalised world' (Commission of the European Communities, 2007, p.3) and emphasised the need for teachers to keep 'up to date with the skills required in the knowledge-based society' (Commission of the European Communities, 2007, p.4). More recently, the need to modernise the teaching profession has been highlighted in the 2013 Communication Opening up Education (European Commission, 2013) and the 2014 Conclusions on Effective Teacher Education (Council of the European Union, 2014) which emphasise the use of new technologies and ICT in teacher formation. Additionally, the 2013 Communication Entrepreneurship 2020 Action Plan (European Commission, 2012a) underlines the importance of teamwork and project-based teaching to teachers' professional learning. In the post-crisis era, these latter school-based approaches are perhaps reflective of a broader call for more efficient and effective investment in teachers' professional development (European Commission, 2012b). Thus, paradoxically, teachers' professional development both contributes to, and is constrained by, national economic performance.

The positive commitment to teacher development in EU education policy is often accompanied by a deficit view of teachers, teacher education and teacher educators. At system level, the Commission has previously identified a general skills shortage, lack of coherence and continuity in teachers' education, and limited access to continuous professional development as key areas of concern (Commission of the European Communities, 2007). Moreover, an ageing teacher population in some countries has been linked to a claim that teachers' professional knowledge was outdated or underdeveloped. Beyond this, teacher development has had to adapt to new institutional challenges. As school autonomy has generally increased, many teachers now take on greater managerial responsibilities much sooner, with associated requirements for professional support, and, as outlined in the 2016 Communication *A New Skills Agenda*, the digital revolution requires teachers to work increasingly with new technologies (European Commission, 2016a). Finally, in Member States which have welcomed large numbers of migrant students, practitioners have had to adjust their teaching to a diverse range of learning, linguistic and psychosocial needs. Teachers have therefore been encouraged to adopt a range of pedagogical methods and styles, including more collaborative approaches to teaching (European Commission, 2016a; 2017a).

The Commission made a further decisive contribution to teacher policy with the publication of *School development and excellent teaching for a great start in life* (European Commission, 2017a). The report argues there are 'three areas where action is needed and where European level support can help' (European Commission, 2017a, p.3) and identifies 'supporting teachers and school leaders for excellent teaching and learning' as one of the priority areas. It goes on to assert that 'high quality, motivated and valued

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1 Article 165 of the Lisbon Treaty makes clear that education (including teacher policy) is a national competence, and therefore the responsibility of Member States, however the EU is committed to policy 'coordination' and encouraging shared approaches through increasing co-operation between countries on education issues.

teachers are at the heart of excellent education' (European Commission, 2017a, p.8) and identifies a number of factors important to the development of such a workforce:

- Pay, contractual status and career long prospects appropriate to recruit and retain an adequate supply of current and future teachers

- High-quality teacher education and on-going professional development

- A particular focus on supporting early career teachers (who are most vulnerable to feeling under-supported and quitting)

- Opportunities for collaboration and for teachers to share their experience and expertise

- More effective use of digital technologies to facilitate collaboration and shared professional learning.

The report affirms that education policy is a national competence and therefore a matter for individual Member States. However, it is recognised that significant problems exist across the European Union regarding the goals expressed above. For example:

> *"In a number of Member States, participation in Continuing Professional Development (CPD) is low or poorly focussed. CPD needs to be accessible, affordable and relevant. Involving schools and teachers in identifying themes and areas of need can help to improve its quality" (European Commission, 2017a, p.8)*

Thus, even where more positive public investment approaches are visible and there is an explicit commitment to quality teacher development, the Commission concludes that there is often a disconnect between the policy rhetoric and the practical experiences of teachers. It is therefore important to understand why these policy aspirations are not realised at school level.

3. MEETING TEACHERS' PROFESSIONAL NEEDS:
WHAT GOES WRONG?

Much academic research points to the importance of supporting effective teacher initial and continuous professional development through a strategic, sustained and adequately resourced commitment to developing teachers and meeting their professional needs (Pedder et al., 2008, Pedder and Opfer, 2010, Earley and Bubb, 2004). The same studies suggest that this commitment does not always reflect the actual experiences of teachers. Numerous studies suggest that the teacher initial and continuous professional development available to educators is often inadequate and inappropriate, and, in too many cases, of poor quality. Perhaps the most comprehensive international study focused on these issues is the 2013 Teaching and Learning International Survey (TALIS) conducted by the Organisation for Economic Cooperation and Development (OECD, 2014). Here, we present a brief summary of some of the key issues set out in the report, followed by evidence from the project survey.

Overall, TALIS indicates high levels of participation in teacher preparation programmes, particularly amongst European countries. However, the content of these programmes, and therefore the extent to which they might meet the professional needs of teachers, varies significantly. For example, only 57% of teachers had received training in content, pedagogy, and practice within their teacher education programme for all the subjects that they were employed to teach (OECD, 2014). Moreover, this overall percentage masks huge discrepancies between countries; in certain EU Member States the figure exceeded 80% (Poland, Croatia and Bulgaria), while in others it was less than 40% (Norway, Spain and Italy). There are also significant variations in the extent to which teachers in some countries receive practical classroom experience in their subject area as part of their teacher education programme. In Italy, more than 50% of teachers indicated that they had received no such experience.

This pattern of variability is also evident in relation to teachers' access to induction programmes at the commencement of their careers. Overall, two thirds of teachers reported that they had access to a formal induction programme (OECD, 2014), however, closer analysis reveals that this applied to 95% of teachers in England, but less than 25% of teachers in Spain, Poland and Portugal. A rather higher average figure (75%) indicated that teachers had access to informal support as part of their induction, although, by its nature, it is difficult to assess the quality of such provision (TALIS provides only limited information on teachers' experiences of professional development).

In terms of general access to continuous professional development opportunities, 88% of teachers in the TALIS study reported that they had accessed such provision in the previous 12 months (OECD, 2014). Of this, the most common form was 'courses and workshops' (70.9%), followed by 'conferences and seminars' (43.6%), and then 'participation in professional development networks' (36.9%). These results are significant because the most common forms of continuous professional development (isolated 'one-off' events) are those that research suggests are often least effective in terms of their impact on professional practice and student outcomes. As Burns and Darling-Hammond (2015) argue:

"An extensive research literature shows that professional development is most effective in improving teachers' instructional practice and contributing to student learning when it is continuous and sustained, is closely connected to the work of teachers in the classroom, fosters teacher professional collaboration, and coherently relates to broader school reform efforts" (Burns and Darling-Hammond, p. v, 2015)

Many of these conclusions in the academic literature were confirmed by responses from ETUCE member organisations to the survey which was distributed to all ETUCE member organisations (58 responses were received), and by participants' contributions at all three project workshops. For further details of the data collection and project participants see Appendix.

The survey data highlighted considerable frustration in relation to teachers' access to continuous professional development. A frequent explanation for this frustration was that the content of professional development was either irrelevant to teachers' professional needs (cited by *Gewerkschaft Erziehung und Wissenschaft*, (GEW) Germany, and *Odborový zväz pracovníkov školstva a vedy na Slovensku* (OZPŠaV), Slovakia, and others) or of poor quality. In the words of the *Latvijas Izglītības un zinātnes darbinieku arodbiedrība* (LIZDA) respondent from Latvia, '*the offer does not reflect [the] real professional needs of teachers*'.

Other common reasons for frustration related to wider issues of workload and the linked question of under-funding (of professional development, generally, and of the education system more widely) which can make access to training more difficult. Figure 2 highlights some of the funding issues prevalent in European education. Average education investment in education as a % of GDP in the EU28 is consistently below that of the OECD average figure (indicated in Figure 2 by the dashed line). Spending on education was hit badly by the economic crisis and is only slowly recovering. Investment levels in education are substantially below the 6.0% figure that is a goal of many education trade unions, and within the global average expenditure in some countries is chronic (Romania committed 3% of its GDP to education in 2014).
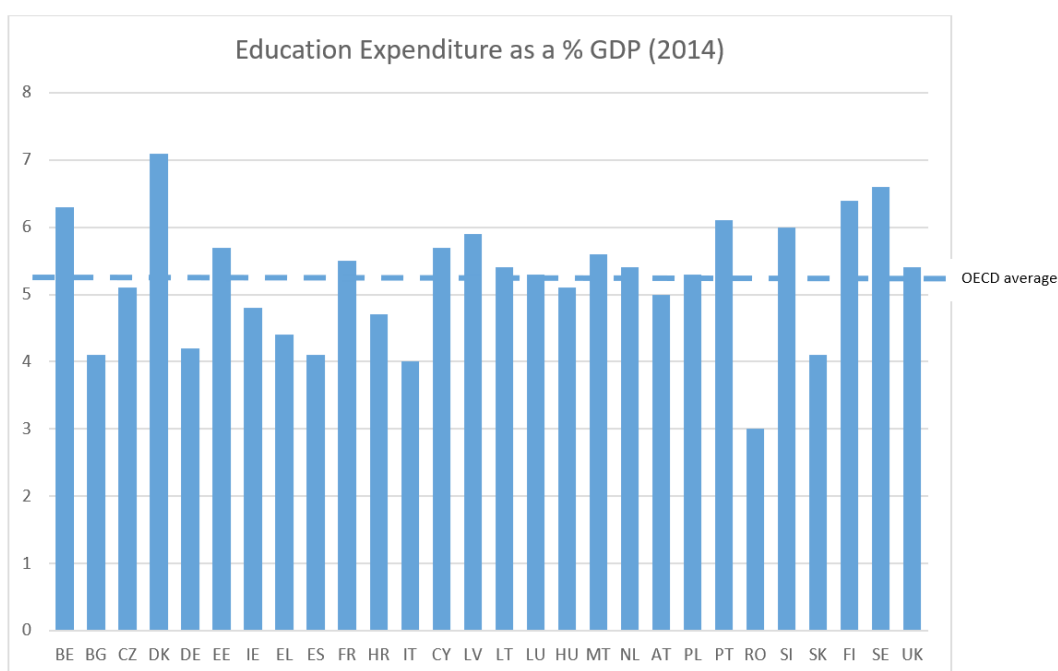
Figure 2: Education Expenditure as a % GDP (2014)

The problem of funding was identified as a particularly acute problem by unions from Southern, Central and Eastern Europe, but the problems are not specific to these countries. *Algemene Onderwijsbond* (AOb), Netherlands, highlighted the problems of teacher shortages across the Dutch education system which places more pressure on current teachers and makes it difficult for them to access training. In other instances, a lack of available substitute teachers explained why many educators were unable to take advantage of training opportunities. Workload pressures were a common problem with a view that teachers struggle to reconcile the competing demands on their time. Training is not seen as an immediate short-term priority and is therefore sacrificed. This explanation was offered by several unions representing university and higher education workers (see *University and College Union*, UK (UCU), and the *Swedish Association for University Teachers and Researchers* (SULF) for some examples). These unions argued that teaching is not prioritised (relative to research) and therefore accessing teaching-related professional development is problematic. UCU also highlighted the particular problems faced by casualised and precarious staff who often do not get the same opportunities as colleagues on more secure contracts of employment: '*casualisation: accessing professional development is particularly challenging for the thousands of academic staff on precarious contracts (e.g. hourly-paid lecturers)*'. This contribution highlights the importance of equality issues in relation to professional needs issues, and specifically that limited access to professional learning opportunities can compound the exploitation experienced by marginalised workers.

Different views were expressed about the relationship between continuous professional development and organisational/management objectives and pay. Several respondents indicated that participation in professional development was not valued by employers and that training was therefore often dependent on the impetus and finances of teachers themselves. It was argued that there was a greater need for professional development to be valued and rewarded. For example, *Českomoravský Odborový Svaz Pracovníků Školství* (Czech Republic) commented:

> *"Teachers are not encouraged enough to get a higher level of development. There is no direct link between the level of further career development and the wages."*

Similarly: *Eesti Haridustöötajate Liit* (Estonia) commented:

> *"There are no guarantees for higher/extra pay and no guarantees for promotion. Teachers' involvement in professional development is significantly based on self-motivation."*

However, in contrast to the above views, some unions indicated that professional development requirements were too closely linked to external objectives, which could result in teachers' pursuing professional development opportunities to achieve a target rather than meet their own professional needs. Where this worked particularly badly, survey respondents indicated that teachers undertook professional development as part of a 'tick box' process to meet external expectations. This was often inefficient and bureaucratic – a view expressed by the *Zwiazek Nauczycielstwa Polskiego* (Poland). *Lietuvos mokytojų, švietimo ir mokslo profesinė sąjunga*, Lithuania, commented: '*Formally, teachers are just collecting certificates but not improving their skills during professional development courses*'. In England and Wales, the National Education trade union (NUT section) argued that high individual accountability in the system mitigated against teachers working with others. Indeed, failure to meet the expectation of collaborative forms of professional development was a common theme. Gymnasieskolernes Laererforening, Denmark, commented:

"More professional development is organised at the school level in order to save money and due to planning considerations. We argue that training with participants across schools is important for inspiration and to secure a national standard."

Similarly, *Christelijk Onderwijzersverbond*, Belgium, argued that there needs to be more emphasis on how professional knowledge can be shared, whilst others were concerned about the lack of time for professional reflection (*Danish National Federation of Early Childhood Teachers and Youth Educators*) and the '*limited opportunities for engagement in informal dialogue with others to improve teaching (lack of peer learning activities)*' (*Federation of Lithuanian Education and Science Trade Unions* (FLESTU), Lithuania). This issue highlights the completely interdependent relationship between so-called industrial and professional issues – teachers want time to collaborate and for reflection – but this needs to be established contractually so that teachers know the time is available and they can depend on it. Without contractual safeguards the time is often eroded due to competing demands. At all levels of education systems, training for teachers is seen as an easy target when financial cuts are imposed.

In summary, there are two key reasons why teachers are dissatisfied with the support and professional development:

1. The most commonly cited reason for teachers' non-participation in continuous professional development was that it conflicted with other working commitments. Teachers' workloads are hugely problematic in many European countries and rising (European Union, 2013). Finding time to undertake training can be extremely difficult. Insufficient resources are devoted to making training available and affordable, and providing the contractual safeguards that allow teachers to undertake this work within their normal duties. **In many cases the failure to address teachers' professional needs is caused by the on-going under-investment in education in many European countries**.

2. A number of problems relate to the inappropriate nature of professional development and a lack of relevance. For example, 39% of teachers believed that the continuous professional development opportunities available to them were not relevant and did not meet their professional needs. It seems clear is that teachers have little control over the nature of the training they are expected to undertake; organisational imperatives are more important than teachers' assessments of their own professional needs. At the same time, TALIS data reveals a 'perception gap' between the views of school leaders and the views of teachers. For example, while 70% of school principals indicated that formal induction processes were in place, only 52% of teachers reported that they were able to access them (OECD, 2014). **These issues suggest that all too often teachers have no meaningful voice in determining and addressing their own professional needs**.

4. MEETING TEACHERS' PROFESSIONAL NEEDS: FIVE UNION STRATEGIES

In the section above we highlight the problems faced by teachers in addressing their professional needs. Such problems point to the need for teachers to have a powerful independent voice to represent their interests on professional issue and here we identify five broad strategic approaches adopted by education trade unions seeking to meet the professional needs of their members. In presenting these five approaches, we emphasise that the strategies are by no means mutually exclusive – many unions work with several, or even all, of these approaches simultaneously, with any single strategy often reinforcing the others. We would also emphasise that all these strategies need to be considered within the particular context of the individual unions. The strategies are not presented as a blueprint. Rather, they set out possible approaches. Clearly, it is for individual unions to determine what fits with their own priorities and what might be possible within each specific context.

DEVELOPING AN EXTENDED BARGAINING AGENDA: THE IMPORTANCE OF SOCIAL DIALOGUE

This research demonstrates that there is no simple separation between so-called industrial and professional issues with regard to the work of educators. Questions of pay and conditions of employment are core concerns for union members, but so too are issues relating to professional learning and career development – often, they are inextricably linked. Where education trade unions are able to effectively represent teachers' professional needs through social dialogue, they are then able to develop an **extended bargaining agenda** with employers which reflects the totality of teachers' experience of work. Such an extended bargaining agenda works horizontally as unions are able to not only connect industrial and professional issues, but also **integrate** them, where appropriate. This works most effectively when extended bargaining also works vertically and when a union is able to ensure its bargaining agenda is reflected at all the different **levels** where social dialogue takes place. We refer to this as a process of **alignment**. Not all these levels of bargaining will be relevant in all contexts (for example the European level only refers to Member States of the EU), but the principle remains the same – bargaining takes place at multiple levels and will work most effectively when the objectives of an extended bargaining agenda are aligned at multiple levels. This is reflected in Figure 3.
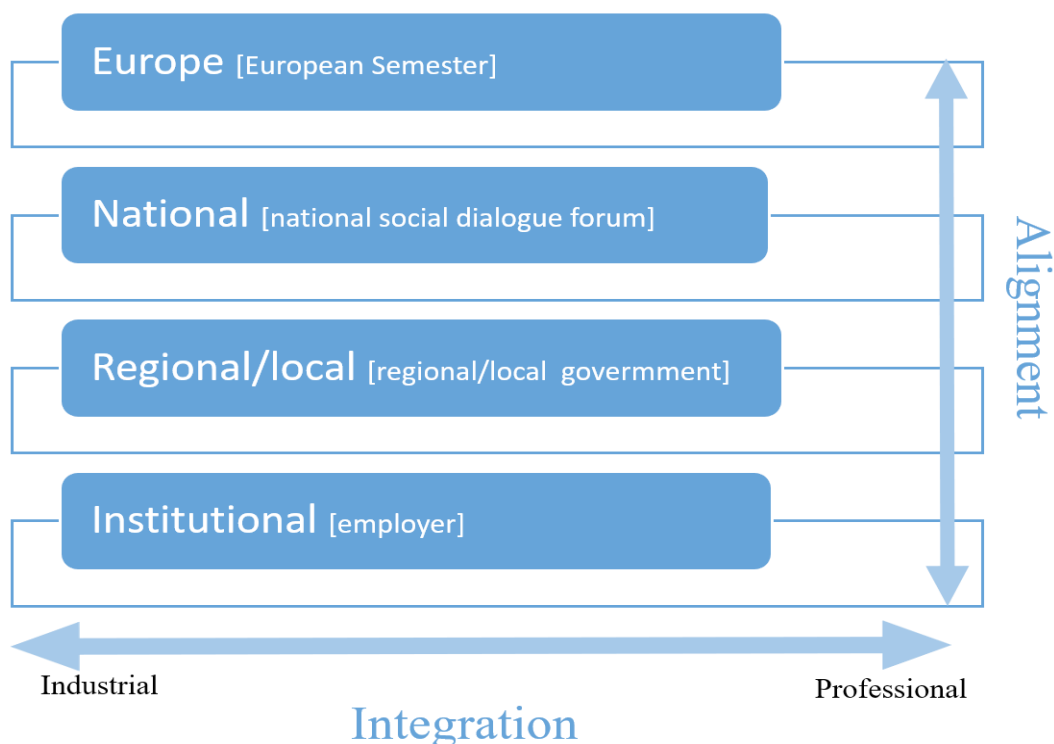
Figure 3: Extended bagaining through social dalogue: integrated and aligned

Social dialogue broadly refers to the relationship between employers, trade unions and government, and the mechanisms used to frame this relationship. In this report, we take as our starting point the definition of social dialogue provided by the European Commission. Obviously, this definition does not only apply to EU Member States, but provides a generic overview of the industrial relations framework. The European Commission defines social dialogue as the existence of discussion, consultation, negotiation or 'joint actions' between social partners (European Commission, 2016b). This can be considered as the **form** of social dialogue.

As well as establishing the form of social dialogue, it is important to identify the **level** at which dialogue takes place recognising this can occur at multiple levels. For education trade unions in the European Union the European level has become increasingly significant, in particular as the influential European Semester has much to say about education policy generally, including teacher policy (Stevenson et al, 2017). Clearly, this does not apply to Member States outside of the EU, but the need to identify at what level within the system key decisions are being made about teacher policy is essential if unions are to make effective interventions at the appropriate level.

In the survey, participating unions were asked about their involvement in different types of social dialogue within their country related to professional issues.

Level	Type of Social Dialogue	Often (%)	Sometimes (%)	Rarely (%)	Not at all (%)	Non-response
National	Communication of information	70.7	19.0	3.4	0.0	6.9
	Consultation	69.0	32.4	1.7	0.0	6.9
	Negotiation	63.8	17.2	6.9	3.4	8.6
Regional	Communication of information	43.1	15.5	8.6	15.5	17.2
	Consultation	39.7	19.0	6.9	15.5	19.0
	Negotiation	31.0	20.7	12.1	17.2	19.0
Local	Communication of information	34.5	20.7	10.3	17.2	17.2
	Consultation	31.0	19.0	12.1	20.7	17.2
	Negotiation	25.9	19.0	13.8	24.1	17.2
Institutional	Communication of information	43.1	22.4	10.3	8.6	15.5
	Consultation	44.8	25.9	3.4	12.1	13.8
	Negotiation	34.5	22.4	15.5	13.8	13.8

Table 1: Responses by category for Social Dialogue items

Education trade unions clearly have a significant role to play in discussing and deciding policy in relation to the professional needs of teachers. However, the responses suggest that education trade unions are less likely to be involved in social dialogue on professional issues than more traditional industrial issues. The data also points to a centralised model in which social dialogue is more likely to take place at national level (determining policy and national frameworks), but less likely to take place at institutional level, where teachers actually experience these issues.

Although education trade unions are involved in social dialogue on professional issues, it is important to recognise two important caveats. First, the picture can be extremely variable between countries. Second, raw figures can mask significant variation in quality – social dialogue can be tokenistic if undertaken without serious commitment to the principles. As Sabato et al (2017) argue, those participating in social dialogue can be '*listened to, but not heard*'. Both of these caveats were highlighted by evidence from the project workshops.

Some of the geographical patterns reflect what is already understood about social dialogue practices more widely across Europe (European Commission, 2008). For example, many Northern European and Scandinavian countries report relatively high levels of union involvement in social dialogue on professional issues. In this study, Danish education trade unions reported that all significant policy issues need to secure agreement through social dialogue as they are part of a collective agreement. By contrast, *Opetusalan Ammattijärjestö*, Finland, is embedded in all forms of social dialogue including joint activity with the employer. For example, the union is currently participating in the government project '*New Learning Environments and Digitalization*' which includes the introduction of digital materials and experimental schemes of pedagogy in initial teacher training and continuous professional development.

In Southern Europe, there was considerable evidence to suggest that social dialogue processes had been badly damaged in the years of austerity and, in these cases, the union voice was being marginalised

(Greece, Italy and Spain offer examples). In Central and Eastern Europe, the position was variable. It is well understood that social dialogue is best described as emergent in many Eastern European countries, but it is clear that, in several countries, progress is being made. For example, the *Bulgarian Union of Teachers* (SEP-Podkrepa) prepared 28 standards for teacher qualification that were subsequently adopted by the Ministry of Education, while two representatives of education trade union *LIZDA* (Latvia) are members of a Ministry of Education and Science working group that is currently reviewing and revising the Cabinet of Ministers' regulations on teachers' education, professional qualifications and professional competences. In contrast, *FLESTU* (Lithuania) reported that they were not even informed by their Ministry when discussions were arranged to discuss teachers' professional needs.

Where education trade unions are involved in social dialogue on professional issues, it appears more likely that they are involved in a wider range of issues addressing teachers' professional needs. For example *Kennarasamband Island*s, Iceland, indicated how it is involved in both social dialogue with the Ministry and in the direct provision of professional training to members:

> *"The union works also on continuous professional development issues through various consultation and cooperation with the government, the local authorities and the universities that educate the teaching profession. The focus of training provided by the union includes also equality issues and issues concerning the code of conduct for teachers. The union-provided training is also organised in cooperation with the government and other governmental bodies."*

This research highlights the importance of reflecting teachers' professional needs in social dialogue. It is through social dialogue that education trade unions have a meaningful voice in discussion with government and/or employers and it is through meaningful negotiations that real improvements can be both embedded and protected.

MEETING TEACHERS' PROFESSIONAL NEEDS: EDUCATING THE EDUCATORS

One of the key ways that education trade unions meet the professional needs of their members is through the provision of educational programmes to members, either directly by the union or in partnership with other organisations. The data highlight that this is widespread amongst unions but can take many forms. Some unions have established training institutes through which they are able to provide a wide range of programmes, often accredited by the relevant government department for the purpose of career development and progression. In other cases, unions may provide courses directly to members or commission specialist training providers to do the same.

What individual unions are able to offer will in part depend on the resources they have available, with obvious economies of scale being available to larger organisations. Some unions take the view that, regardless of the resource issue, this is not the role of the union and that providing appropriate training is an employer responsibility. Within this research, it was clear that bargaining through social dialogue mechanisms for improved employer-provided access to professional development was not inconsistent with the union providing training itself directly to members. Union training, even on so-called 'professional issues', is often presented as distinctively different from employer-provided training. Union training was considered to offer more autonomy to participants and be less driven by employer and management

agendas. In some cases, it was seen as a 'safe space' to discuss and raise issues that would not have been possible in employer-provided professional development.

Given the complex and rapidly changing working environments, many unions are experimenting with different ways of providing training, particularly using online methods. While such flexibility clearly has advantages, it was also recognised that the growth of online learning is itself a reflection of the way in which teachers' feel their time is 'compressed' by the demands of their jobs. The need for union training to maintain face-to-face provision, and to combat the individualism and isolation that modern work encourages, was seen as important.

Finally, we would caution against a formulaic distinction between union training provided for activists and union training for professional purposes. This is not necessarily a helpful differentiation as in reality the boundary is blurred. Several participants commented that participation in the union – and the confidence gained from an enhanced understanding of education policy – was the best professional development they had received from any source (union or otherwise).

Data from the survey highlights the diverse ways in which education unions support the professional development of members, and that this is a priority area of work for many unions (see Figure 4). For example, more than 80% of respondents indicated they were involved in negotiations to improve members' access to professional development, whilst slightly less than half of respondents indicated their union had a dedicated department to support the professional development of educators.

Education trade union involvement in supporting member professional development
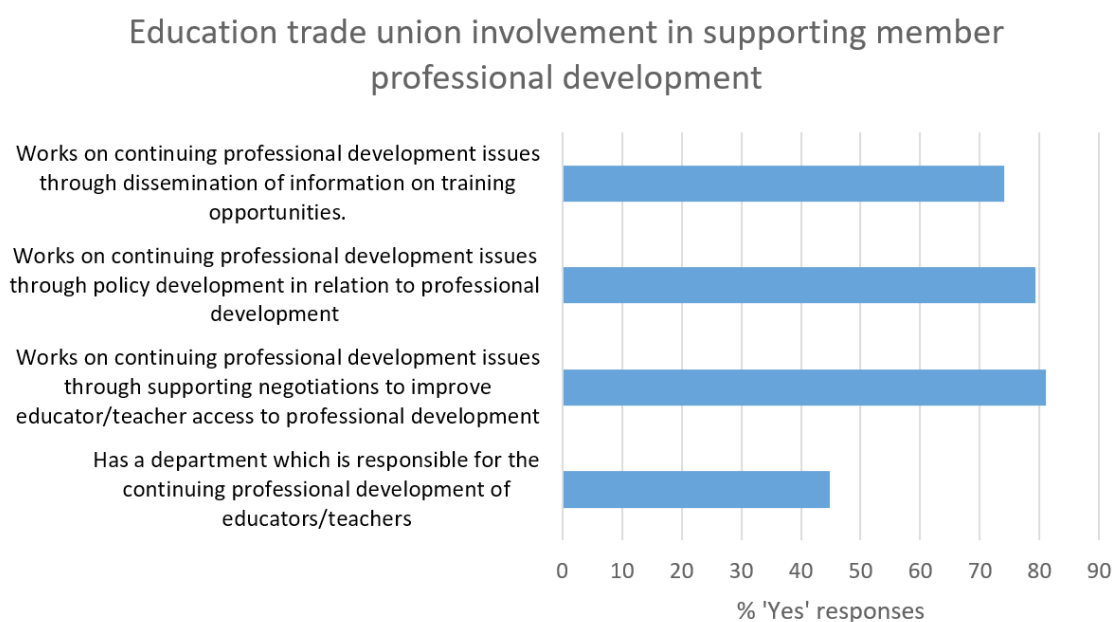
Figure 4: Education trade union involvement in supporting member professional development

Nearly two-thirds of education trade unions indicated that they provide professional training directly to members (62.1%). It is important to reiterate that this refers to training for professional development and not that provided to union officers and activists to support their union roles. In Spain *Federación de Enseñanza* CC.OO has specialist programmes that it targets and young and new teachers recognising the very specific needs of these educators. Such courses also serve to connect the union with younger teachers and build the connection between union and educator.

The most common focus of this type of professional development for members relates to what might be considered core 'industrial' issues. Several unions in the survey indicated that they only provide training to members on issues relating to employment law and contracts. For example, the *Swedish*

Association for University Teachers and Researchers (SULF) commented: '*SULF courses are mostly on workers' rights and policy development, not professional development, which is provided by the employer*'. Where such training was offered, 88.6% of respondents indicated that they provided training on workers' rights and working conditions. However, union provision also covers a range of issues including information on new policy developments and how they impact teachers'/educators' work (88.2%); support for personal and career development e.g. leadership development (62.7%); and training focused directly on pedagogy and didactics (55.5%).

The data also demonstrate that union provision assumes a wide range of forms (for example, nearly one quarter offer training online), and that unions work with a wide range of other partners to provide (through collaborative funding) and accredit the training. Formal accreditation appears to be less common but, where it does occur, a wide range of bodies are enlisted to provide it (the most frequently cited body is the Ministry of Education - 24.1%). More common than accreditation is the co-provision of training with other providers. It is clear that unions make extensive use of independent trainers and consultants (who provide specialist courses) but they commonly co-provide professional development with universities (29.3%), local authorities (24.1%) and teacher training institutes and centres (25.9%). *The Autonomous Union of Employees in Science and Research in Serbia* commented that '*the union-provided training is organised in cooperation with Ministry of Education and Research representatives*' and this points to a high level of state-union collaboration in some jurisdictions.

Several unions indicated that they had their own training institutes and that these provide a wide range of programmes, many of them accredited. For example, the *Romanian Free Trade Unions Federation in Education* (FSLI) commented:

> *"Training provided by our National Training Centre is on the following topics: health and safety in schools, quality assurance in education; internal evaluation of schools, teachers and pupils, management of education, equal opportunities, teaching methods for inclusive education. We use our own Trainers and Experts Body and experts from teacher unions who are our partners."*

Similarly, *UIL Scuola* (Italy) commented:

> *"UIL Scuola has helped set up a training and research institute that is autonomous but formally committed to spreading UIL Scuola views and principles. We encourage our active members to support it with their expertise but, at the same time, it has its own experts, coming from the academic sector, who help design and implement training activities."*

Further details of *UIL Scuola*'s training institute is provided in the Italian case study later in this report. Similar examples are provided in the Polish case study where both *Krajowa Sekcja Oświaty i Wychowania NSZZ "Solidarność" - National Education Section NSZZ "Solidarność"*, *SKOiW "Solidarność"*, and *Zwiazek Nauczycielstwa Polskiego* (ZNP) have their own training institutes.

FLSI (Romania) developed a project entitled '*Together for Quality in Education! Human resource development in school education through educational partnership*' and implemented in partnership with the National Agency for Quality Assurance in Education, as a result of which a national teacher training centre was established. The centre includes a network of eight regional centres and 16 national centres that provides training in quality assurance in the education system, health and safety in schools, school management, social dialogue, leadership, and several other key topics. All teacher training courses provided by the centre are certified and recognised by the National Agency for Quality Assurance in Education in Romania.

Swedish education trade unions also provided examples of the diverse range of educational opportunities offered to union members. *Lärarförbundet* publishes an online list of regional professional development courses including *inspiration evenings*, teacher meetings and teachers' task. Inspiration evenings are free seminars on themes such as raising self-esteem, multilingualism, and teaching with digital tools. In addition, regional branches hold Teacher Days i.e. 2-3 day CPD courses. *Teacher meetings* enable teachers to talk about daily working life. Alongside a theme bank of discussion topics, *Lärarförbundet* provides guidelines on how to facilitate conversations which lead to genuine professional development. Finally, *teachers' task* allows newly qualified teachers to make connections, exchange experiences and ask questions on industrial and professional issues.

Lärarnas Riksförbund also offers free local professional development seminars. Past themes include ICT as a pedagogical tool, mathematics for new arrivals, and human rights in schools. This union publishes podcast interviews on educational themes and provides advice on professional development funding. *LR Stud* has its own programme of social and professional events. *Lärarnas Riksförbund* offers a range of online career development resources including a job search engine, exemplar curriculum vitae, and advice on interviews, individual salary negotiations and contract agreements. At subject level, there are nine *subject forums* to deepen members' professional, didactic and behavioural scientific development, ensure continuity between school levels, and highlight special educational needs. *Omstart* offers newly arrived teachers advice on how to validate or complete their teacher training in Sweden. There are also online resources for teachers of newly arrived pupils, the *#lärarehjälper* hashtag which recruits retired and trainee teachers for work at refugee centres, and discussion groups for Swedish as a foreign language teachers. This last example illustrates the way education trade unions are often leading the way on supporting teachers respond to the increase in migration across Europe. Providing support on this issue was widely cited by many unions.

Direct support for members' professional development went beyond the provision of courses and seminars. Several unions provide support for members to undertake small-scale research projects (for example *Educational Institute of Scotland*) or work with research partners elsewhere to develop activity. *The Danish National Federation of Early Childhood Teachers and Youth Educators* works with the Early Years Education and Care Research Centre at Roskilde University to undertake research on professional development that addresses their members' needs.

It is also important to highlight the role played by media, publications and online resources in the professional development of members. Several unions provide regular publications which offer authoritative comment on current education policy (see the work of both unions included in the Polish case study in this report). Other unions have re-oriented their publications strategy in order to offer teachers access to different types of information in different formats. In Ireland, the *Irish National Teachers' Organisation* has a substantial programme of professional development courses for members (within the teachers' collective agreement, participation in some courses receives compensatory days off work later in the year) and, in 2013, it commenced publication of an open access academic-style journal
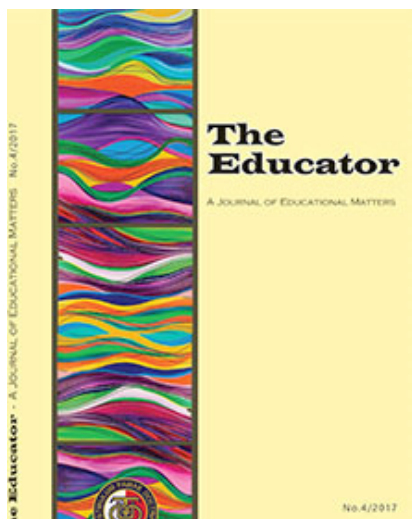
(the *Irish Teachers' Journal*) that seeks to bridge the gap between research and practice for members. A similar step was taken by the *Malta Union of Teachers* when, in 2013, the union launched an 'annual peer-reviewed journal of education matters' called *The Educator*. The switch from a newspaper format to a peer-reviewed journal was based on an assessment of the changing needs of teachers. Since much basic information is now rapidly and readily available to teachers online, the union decided that its contribution might be better focused on making considered, reflective and research-based material more accessible to teachers. The new journal contributes to the professional development of teachers, but also provides a space to debate the role and importance of professional development itself. For example, the 2016 volume contains an article by Michela Sammut titled '*On-going professional development of teachers: the case of Malta*' and offers an important insight into challenges and opportunities for enhancing teachers' professional development in a Maltese context.

TEACHERS' PROFESSIONAL NEEDS:
FACILITATING SELF-ORGANISATION

In considering how education trade unions meet teachers' professional needs, it can be tempting to see the role of the union as the provider of a service intended to meet the 'needs' of the individual member, who acts as a 'consumer' of union services. Similarly, the union 'represents' the needs of the membership to the employer, and acts on 'behalf' of the member(s). Such an approach can lead to a perception of the membership as largely passive, with the effectiveness of the union judged by the quality of its 'service' and the 'added value' it provides.

An alternative approach that emerged in this research considers the 'professional agenda' as a different aspect of teachers' work around which the union can organise members and develop models of member self-organisation. This approach is much more likely to be decentralised and organised closer to members in their workplaces. In such instances, union members understand their professional needs to be addressed by fellow union members. Consequently, cultures of self-organisation are developed and members' union identities are strengthened. In this study, this is perhaps best illustrated by Union Learning Representatives (ULRs) in the UK and, here, we illustrate the work of the *Educational Institute of Scotland* (EIS) as presented at the Warsaw project workshop.

The EIS has a long tradition of integrating industrial and professional issues into an extended bargaining agenda (see above) and utilises multiple forms of social dialogue (negotiation, consultation, joint actions) to make gains for teachers, which are then reinforced at school level so they are experienced as real by teachers, rather than simply the aspirations of policy makers. This process of reinforcement 'on the ground' is supported by the use of Union Learning Representatives (ULRs). ULRs are lay union officers[2] whose role is to advocate for improved professional learning opportunities for fellow union members and other colleagues. The role does have some statutory support and it is important to note this in terms of replicability issues in any non-UK context (ULRs are part of the UK legislative framework and not solely in Scotland). EIS has always taken the role of ULRs very seriously and seized on the opportunity they offered the union when they were first introduced. Hence it has developed a well-structured training

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2 Lay officers are union members who have a representative role in the union. They are educators and not union employees.

programme for ULRs, involving online study and a postgraduate module delivered in partnership with a Scottish university. The EIS has now trained over 200 EIS members as ULRs.

Most ULRs carry out their role in their own school, although there is some local authority level work also. What is evident is that ULRs provide a 'different face' of the union, and union members and other teachers see the union working for their professional needs visibly in their own workplace. Rather than a union initiative that can seem remote and detached from teachers' experience, EIS members see their own colleague (and fellow union member) supporting them on important issues of professional learning and career development in their own workplace. This helps to build union commitment and strengthen collective solidarity more widely. It can also serve to draw members into union activity who might not have become involved through more traditional routes. Finally, it legitimates the authority of the union on policy matters as it is seen and known as a union that takes professional issues seriously. In all senses, the union is strengthened through this increased engagement and commitment from members and through its ability to speak with authority and credibility on all the issues impacting teachers. As the union's General Secretary indicated at the project workshop, '*there are no major curriculum or pedagogical initiatives in Scotland where the EIS is not involved in the conversation*'. (For further discussion of the EIS's use of ULRs see Alexandrou 2007, 2009)

Another example of this 'organising-from-below' approach can be found in the newly formed *National Education Union* (UK) where union members, typically younger and newer members, are self-organising around a range of professional issues. Two examples illustrate this well; both started as single instances but appear to be growing organically and from the 'bottom up'. In the first example, union members partnered with their local university to undertake a project in which teacher trainees identified challenges for novice teachers entering the profession and the steps needed to tackle them. The project involved union members working directly with teacher trainees during their course of study. The results of the projects were presented by the teacher trainees and the best work has been incorporated into the future campaigning priorities of the local union. In the second example, union members, who were frustrated by the manner in which school-level discussions of policy and professional issues were 'filtered' to meet the requirements of policy makers, decided to organise their own reading group focused on educational literature. The meetings are informal, popular amongst young teachers and often attract attendees who do not attend 'traditional' union meetings. After the first group was formed, other groups have also been established and there are plans to 'network' the groups using various technology platforms.

Both the projects described above have connected with each other and adopted the common hashtag #NEUideas. They share many features – they are driven by young teachers and formed to meet the needs of (largely) young teachers. While union officials and organisers are supportive of these initiatives, the agenda is set, and the work is undertaken, by the young teachers. They reject bureaucratic ways of working and rely heavily on informality and networking. They also make substantial use of new technologies, both as a means of internal communications between themselves (WhatsApp groups for example) but also being outward facing (those who cannot attend the reading group in person participate in the debate via a group blog). What is perhaps most significant about these initiatives is the way they place the union in a new space where teachers more widely are self-organising around professional learning, but where unions have had limited presence. Social media has become a significant feature of the new professional learning landscape, but this area can be a challenge for unions where responses tend to be slower and more considered. Although the #NEUideas self-organising projects identified here are still embryonic they represent important examples of union members self-organising around professional issues and it will be important to learn from them as they develop.

SHAPING THE DISCOURSE ABOUT
QUALITY EDUCATION SUPPORT FOR
THE TEACHING PROFESSION

This strategy refers to the campaigning and advocacy role of unions. This is a well understood role of trade unions and education trade unions, in particular, are well known for making the case for public education to both the wider public and to policy makers. Such activity may be less commonly associated with meeting the professional needs of teachers, but we would argue it is no less important. Education trade unions undertake campaigning and advocacy work in order to 'shape the discourse' on education policy and in order to shift the parameters within which policy debates take place. Undertaking this outward-facing and campaigning activity helps to frame the narrative within which policy options are constructed. An obvious example relates to union campaigns on the funding of public education. Throughout this report, it is clear that teachers' professional needs often go unmet because there are insufficient resources to meet them. Where unions are able to challenge the narrative of austerity (and the 'unaffordability' of quality public education) increased resources can be shifted to education. This opens up the possibility of addressing many of the problems faced by teachers and identified in this report.

It is also important to recognise that many of the professional issues that teachers face as problematic are not simply about resources or the lack of them. A 'business capital' approach to teacher development (see section 3 above) has different implications for teachers and how they experience work than an alternative approach. There can be no ignoring the political dimension of 'professional issues' and therefore unions have a key role ensuring that public-service values, which promote quality public education for all, are always foremost.

In this research, we identified numerous examples of how education trade unions were 'reframing the narrative' about public education and therefore the parameters within which public policy solutions are framed.

In Greece, the *Federation of Secondary School Teachers of Greece and the Greek Primary Teachers*' Federation used World Teachers' Day to launch a national campaign in defence of academic freedom. Greek teachers have experienced devastating cuts since in the economic crisis with dramatic effects on all aspects of their working conditions, including access to professional development. However, one less obvious, but significant, impact of the crisis has been a closing down of the space in which teachers can exercise professional autonomy. Greek teachers' unions emphasised the potential threat to democracy and made the case for defending academic freedom and teachers' professional autonomy.

In Italy, all the teachers' unions combined to launch a joint campaign in defence of the Italian public school whose ethos and values had been undermined by the 'business capital' approach of the '*Buona Scuola*' education reforms. One effect of these changes has been to increase the power of the school principal, at the expense of teachers, on matters of professional development. The union campaign, *La Scuola è aperta a tutti e a tutte* ('The School is Open to Everyone') deliberately aimed to rebalance

the debate about education and put public-service values back at the heart of the Italian public school system. The campaign used the hashtag #scuolabenecomune and drew on the democratic tradition of the Italian constitution (70 year anniversary) and the work of radical educator Don Milani through the school he founded in Barbiana (50 year anniversary). Such an approach emphasised the need for the democratic and collegial governance of Italy's schools and therefore the professional autonomy of teachers.

Both of the above examples highlight ways in which education trade unions have campaigned around issues of academic freedom, professional autonomy and democratic governance and the manner in which teachers' control over their own work is often undermined by increased state control of education (experienced sharply in countries impacted by the crisis). In many other examples, education trade unions have waged high-profile campaigns for improved funding of public education. Although such campaigns are not immediately focused on meeting teachers' professional needs, they nevertheless confront the key issue of underfunding which this report has identified as a key explanation of why teachers experience limited access to professional development.

TEACHERS' PROFESSIONAL NEEDS: BUILDING ALLIANCES AND DEVELOPING PARTNERSHIPS

Many examples of education trade unions meeting teachers' professional needs presented in this project highlight the importance of alliances and partnerships with other organisations – governmental bodies, specialist providers of professional development, universities and pedagogical institutes, and other unions. Working with others clearly confers significant benefits:

- Additional and different expertise

- Access to wider networks

- Ability to leverage additional resources

Working in the professional policy space means that unions can often enhance their legitimacy by partnering with relevant organisations. In this report, there are multiple examples of unions working with research institutes, universities, think tanks and advocacy groups, both through the financing and the provision of programmes. In the survey 25% of respondents indicated they were able to secure funding from their government to support programme provision, whilst 35.7% of respondents were able to make use of EU project grants.

One union that demonstrates an effective use of partnerships is *FSLI* (Romania) who have made effective use of European Union funds to support their work, including 10 mobilities programmes (Leonardo da Vinci/Erasmus +) to train 398 teachers in Spain, Portugal and Italy. The union also works with other ETUCE-affiliated unions and it has partnerships with *Syndicat National des Enseignements de Second Degré* (France) and *Skolenes Landsfirbund* (Norway) to enhance its training offer to members. Developing partnerships across ETUCE member organisations may offer interesting possibilities for building future collaborations.

Many unions had developed collaborations with other training providers, including universities, pedagogical and research institutes to provide programmes. The range of providers, and their significance is illustrated in Figure 5.

Union partnerships for providing training (%)
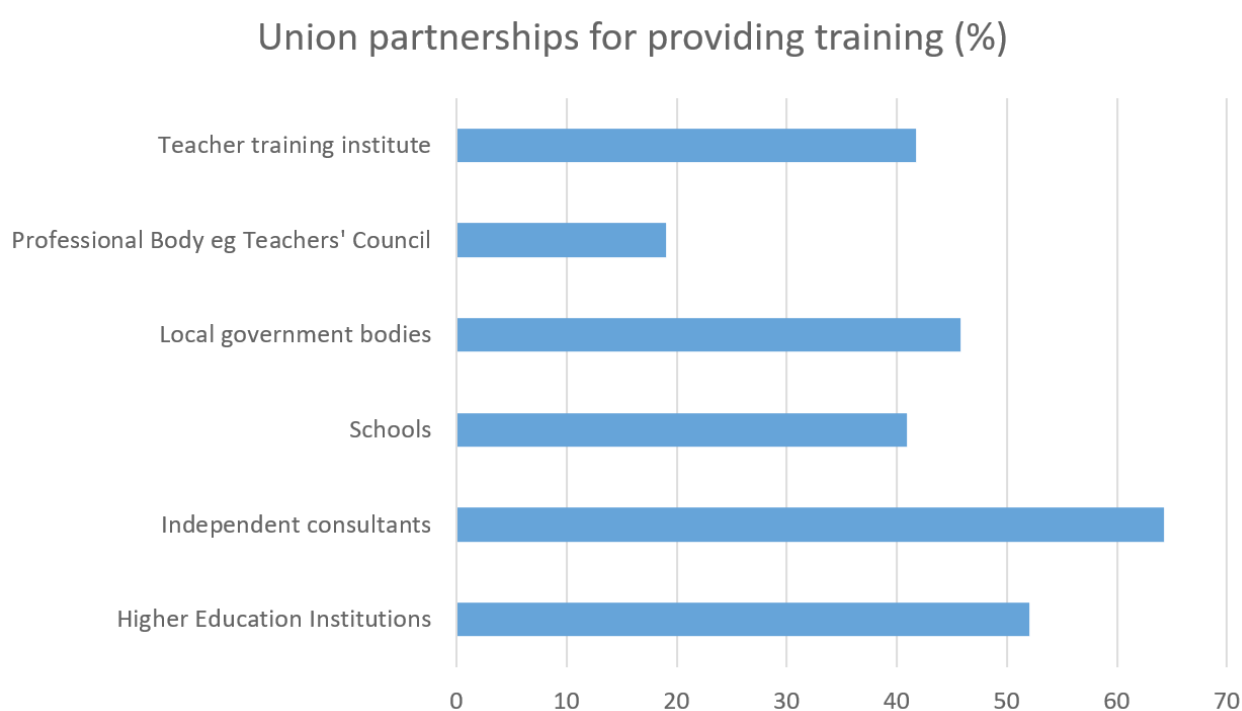
Figure 5: Union partnerships for providing training

In addition to partnering to provide courses and programmes many unions worked with research bodies in order to develop evidence based arguments to help advance union policies on professional issues. For example, ZNP in Poland was working with an independent research institute to develop an evidence base to help promote its policies for supporting teachers (see Poland case study), while several unions identified collaborations with specialist university departments.

5. MEETING THE PROFESSIONAL NEEDS OF TEACHERS: AN IMPORTANT ROLE FOR EDUCATION TRADE UNIONS

Education trade unions exist to reflect the collective interests of teachers and educators. As with all trade unions, the purpose of this collective organisation is to allow individual workers, through their collective organisation, to assert meaningful control over all aspects of their work. For education workers, the labour process of teaching is sometimes divided into 'industrial' and 'professional' issues. 'Industrial' matters refer to basic questions of work and how it is organised, covering pay and working conditions, while 'professional' matters refer to broader questions of pedagogy, policy and professional development. This distinction between the industrial and professional dimensions of teaching is often presented as an 'either/or' binary – that an issue is either one or the other and, in some instances, the two may be in tension.

At its Congress in 2016, ETUCE passed a motion which recognised that education trade unions need to address both the industrial and professional dimensions of teachers' work, and specifically it highlighted:

> *"[The] Dual role of education trade unions of both providing support to teachers in relation to their terms and conditions of employment and in relation to professional matters, and stress that they are highly competent in both roles"* *(ETUCE 2016).*

Individual unions will clearly have their own perspective on this issue, with particular positions reflecting historical traditions and specific contexts. In this report, we highlight three reasons why it is important for education trade unions to address both industrial and professional issues.

EDUCATION TRADE UNIONS MEETING TEACHERS' PROFESSIONAL NEEDS: SUPPORTING TEACHERS' CAREER AND PROFESSIONAL DEVELOPMENT

The work of teachers is multifaceted. To be highly effective practitioners in a complex and fast-changing world, teachers need to be able to access high-quality initial training, so they are able to enter the teaching profession as competent and confident professionals. Crucially, they also need opportunities to continue learning so they can combine their developing practical experience with wider insights gained from peer collaboration and engagement with research and pedagogical theory.

Opportunities to engage in professional learning and development throughout a career are central to supporting teachers to be the highly skilled and effective practitioners they aspire to be. They are also central to ensuring that teaching is a fulfilling role in which teachers experience high levels of job satisfaction and a sense of personal and career development. Moreover, when teachers experience work in this way, they are more likely to remain committed to a career in teaching, thereby developing teaching as a sustainable long-term career. What is well understood is that teachers who feel isolated and unsupported in their work are much more likely to quit teaching, creating a teacher shortage crisis that is evident in several parts of Europe.

Given the central importance of professional learning to teachers' professional and career development, but also the recognition that all too often teachers are denied access to high quality professional learning, education trade unions have a crucial role in ensuring that their members can access the professional learning opportunities they need to develop in their careers.

EDUCATION TRADE UNIONS MEETING THE PROFESSIONAL NEEDS OF TEACHERS: UNIONS AS THE TEACHERS' VOICE AT WORK

Several survey questions focused on the professional status of teachers. Teacher status is important because it is influenced, at least in part, by a policy framework created by organisations external to the profession such as state agencies and teacher registration bodies. These organisations often determine how membership of the teaching profession is defined and what on-going requirements may exist in relation to teachers' continuous professional development. Consequently, these policy actors have a significant influence on shaping teachers' professional needs, as teachers' professional and career development is often dependent on meeting these organisational expectations.

	Yes (%)	No (%)	Non-response
There is a professional requirements framework for educators/teachers e.g. a list of requirements which an individual must meet in order to be given status as a professional educator	94.8	3.4	1.7
There is an ethical framework or a common professional policy declaration	50.0	46.6	3.4
There is a nationally recognised professional development framework	62.1	32.8	5.2
There is a professional registration body (NOT the union) for educators/ teachers	24.1	72.4	3.4
Where such a body exists, is membership of such a body compulsory for all educators/teachers?	57.1	42.9	0.0

Table 2: Summary of responses to questions related to the legitimation of teachers' professional status [3]

Although a list of requirements to gain entry to the profession is extremely common, other frameworks and organisational structures related to status, ethics and professional development are less widespread in their extent. For example, fewer than one third of respondents confirmed that a professional registration body exists and, where such bodies exist there is generally strong teacher and education trade unions involvement at board level, with 64.3% of respondents indicating that the constitution guaranteed a majority teacher representation. In a slightly smaller proportion of cases (57.1%), education unions have guaranteed representation on the board of these organisations.

Education trade unions exist so that individual teachers and education professionals can, by organising collectively, assert greater influence over their work. In the education sector, the union concern with 'work' is often viewed rather narrowly as issues related to pay, pensions or conditions of employment. However, many challenges that teachers face in their work sit outside these core trade union concerns because they are so-called 'professional issues'. Questions of curriculum and pedagogy are not always seen as 'union issues'. Yet, it is in these areas that teacher professionalism can be most undermined. Teachers find their professional discretion on what and how they teach is constantly being eroded, while, at the same time, their performance, measured through student outcomes, is increasingly scrutinised. These challenges to professional status, described by Stephen Ball as the 'terrors of performativity' (2003) and the 'tyranny of numbers' (2015), mean that questions of professional autonomy (or the lack of it), workload, performance measurement and pay all become inseparable. For a teacher, who is attempting to do the best job they can under such circumstances, the issues raised are not neatly divided between the 'industrial' and the 'professional' – the distinction is meaningless. For that teacher in that moment, these issues are simply experienced as 'work'. The key questions confronting such a teacher and their colleagues relate to how they can take back control of their work. In this instance, it is the union that provides the vehicle for teachers to act collectively and reassert their professionalism and their agency over their work. However, this can only happen when education trade unions embrace an extended bargaining agenda which sees the 'industrial' and the 'professional' not only as connected but as integrated, and the labour process of teaching representing the totality of teachers' work.

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3 In order to present the data accurately, the tables include 'non-response' rates. In some cases, these are quite high. This response rate relates to the perceived appropriateness of some questions to certain respondents. For example, unions may have decided that some questions were irrelevant to their phase of education (e.g. higher education) or national governance structure (e.g. countries in which there is a clearly recognisable regional governance structure with significant responsibility for education). Thus, questions designed to capture contextual nuances are likely to draw higher non-response rates, if particular issues are considered insignificant.

EDUCATION TRADE UNIONS MEETING TEACHERS' PROFESSIONAL NEEDS: BUILDING AND STRENGTHENING THE UNION

When education trade unions commit to an extended bargaining agenda, new opportunities open up to engage with union members and draw union members into activity in the union. At a simple level union involvement in professional issues, including the provision of union training on professional issues, can be seen to 'add value' to the range of services provided by the union, which in turn may impact on union recruitment. Often this aspect of a union's work may appeal to sections of the membership that may not always be inclined to participate in more traditional forms of union activity which can be seen as bureaucratic and unwelcoming. There is already evidence that union provided professional development draws diverse attendance and that some groups who may be under-represented elsewhere in the union (such as younger members) are more likely to participate in activities of this type (Bascia and Stevenson, 2017).

However, when unions adopt an extended bargaining agenda, this is not simply a matter of 'adding value' or providing an improved 'service' for members, but rather it offers real opportunities to draw members into union activity, to develop their sense of collective identification with the union organisation and to help strengthen support for union policies and positions amongst the membership. In short, it represents a form of organising in which the union's collective strength is developed by embedding union membership in the professional identity of the teacher. The aspiration is a virtuous circle in which member engagement is broadened and deepened, which in turn develops union strength and influence.

6. EDUCATION TRADE UNIONS MEETING TEACHERS' PROFESSIONAL NEEDS: CASE STUDIES

In the following three case studies we illustrate how the issues described in this report are experienced in three different national contexts, and the diverse ways in which education trade unions in each of the three countries are responding to meet the professional needs of teachers.

GERMANY

ITALY

POLAND

GERMANY

TEACHER EDUCATION AS LIFELONG LEARNING: A DISRUPTED PROCESS

Teacher education in Germany started to receive greater political and professional attention in the 1990s. In the context of poor student performance in international comparative tests, a shortage of teachers and the Europeanisation of higher education through the Bologna Process, teachers' competences and the quality of their professional learning became the focus of increased criticism. The main concerns have related to the structure and content of the three distinct phases of teacher education: university study, preparatory service (in seminaries and training schools) and continuous professional development (CPD). Specific problems identified include: poor quality and integration of the university course components (e.g. educational sciences, subject didactics, research theory); poor organisation of university study and assessment; no institutional location for the study phase across the various university faculties; insufficient opportunities for practice-based inquiry; poor integration of the university study and preparatory service phases; a lack of career orientation and practical relevance in university study programmes; poor conceptualisation and development of CPD, and a lack of cooperation between schools and universities in this regard.

Despite widespread consensus on the deficiencies of teachers' professional learning and development, there are differences of opinion in how the problem should be solved. This is largely due to the fact that educational policy in Germany is the responsibility of the sixteen federal states (*Länder*). There is therefore no transnational approach to the development of teacher education. In fact, a recent report for the German Education trade union (GEW) referred to teacher education in Germany as 'a federal patchwork quilt' (Walm and Wittek, 2014).

BOLOGNA: THE HARMONISATION OF COMPLEXITY?

In the 1970s, the professional project of teachers was extended through the integration of teacher training colleges into university institutions. Teacher education is now university-led in all but one of the German federal states; teacher training colleges still remain in Baden-Württemberg. In 1999, The Standing Conference of the Ministers of Education and Cultural Affairs of the Länder in the Federal Republic of Germany (*Kultusminister Konferenz* or KMK) signed the Bologna Declaration. Since then, most reforms of teacher education have been a reflection of continued state-level commitment to the development of the European Higher Education Area. These have tended to be of a structural nature, namely, part of a requirement to fit all higher education programmes within a common European framework. However, a 2006 survey by the German Rectors' Conference (*Hochschulrektorkonferenz*) established that two different study models to teacher education had emerged:

- **The concurrent model** in which all the study components (educational sciences, subject didactics and subject knowledge) are studied at both Bachelors (BA) and Masters (MA) level.

- **The consecutive model** in which specialist subject knowledge is studied at BA level and educational sciences and subject didactics are studied at MA level. The first level has been referred to as a 'polyvalent' BA, since it allows students to leave the programme early and enter other occupations.

Despite the apparent structural convergence, differences still exist in selection criteria, course organisation, grading and length of training at the state level. In addition, it has been argued that the preparatory service and continuous professional development phases have not received as much attention as the study phase. Significantly, formal school induction programmes are only evident in some federal states and they are rarely linked to the study and preparatory service phases.

THE *LEHRAMT*: PROFESSIONS WITHIN A PROFESSION

Teaching is a civil service profession in Germany. However, the civil service grade (*Lehramt*) to which a teacher is assigned is contingent on study orientation (e.g. the type of school for which a teacher is educated) and individual state career regulations. In this regard, the GEW has argued that the teacher education system contributes to the development of a two-tier teaching profession and the indirect discrimination of women teachers. Currently, primary teachers, who are predominantly female, are a civil service grade lower (A12) than other teachers (A13). This not only has implications for professional status, it determines primary teachers' career-long pay structure since, with limited promotion opportunities, most teachers remain on the same grade until retirement.

In certain states (Berlin, Brandenburg, Bremen, Hamburg, Lower Saxony, North Rhine Westphalia and Schleswig-Holstein), the MA-level teacher education examination has replaced the First State Examination (*Erstes Staatsexamen*), whereas in others (Mecklenburg-Vorpommern, Rheinland-Palatinate and Saxony-Anhalt), the First State Examination is still required in addition to the new MA. In Thuringia, the equivalence of university and state examinations is the cause of much controversy, whilst Bavaria, Hesse, Mecklenburg-Western Pomerania, Saarland and Saxony-Anhalt would like to hold onto the conventional state examination until further notice. There are thus tensions between the requirements of the Bologna Process and political and institutional preferences at the local level. Following the university study phase, teacher trainees need to carry out a period of preparatory service and pass the Second State Examination (*Zweites Staatsexamen*) in order to attain civil servant status.

A DIVIDED SCHOOL SYSTEM

The First State Examination qualifies teachers to work in a certain type of school. However, universities only offer teacher education programmes related to the school types in their individual state. According to resolutions of the KMK, teacher education is considered comparable across Germany. Still, despite demands from the German Education trade union (GEW), the states are under no legal obligation to recognise these resolutions. Consequently, opportunities for teacher mobility between school types and states are limited.

THE GERMAN EDUCATION TRADE UNION (GEW): A TRADE UNION FOR A PROFESSIONAL COMMUNITY

The German Education trade union (*Gewerkschaft Erziehung und Wissenschaft* or GEW) is the largest educational trade union in Germany. It represents over 280,000 women and men who work in educational

and research occupations in early childhood, school, university, vocational and adult education, and other educational fields. Affiliated to the German Trade Union Confederation (*Deutscher Gewerkschaftsbund* or DGB), the GEW is independent in terms of its funding and party politics. The union has 16 regional associations with their own executive committees. Union membership varies between 15% and 50% at the state level. Young teachers are represented by *Die Junge* GEW.

The GEW considers the current decentralised system of teacher education confusing and chaotic, and advocates 'understanding and reforming teacher education as a holistic, cross-institutional process: from university studies through the traineeship to the career entry phase and in-service training for teachers' (Walm and Wittek, 2014). It argues that this should be based on teachers' professional self-understanding of their task in the school workplace.

TEACHERS' PROFESSIONAL LEARNING AND DEVELOPMENT OPPORTUNITIES

In addition to a range of specialist journals, GEW publishes a nationwide trade journal Education and Research (*Erziehung & Wissenschaft*) and state-level magazines. On the national website, there are many online resources related to the preparatory service component of teacher education e.g. an interview with a teacher on preparatory service, insurance tips for preparatory service, help with lesson preparation (Open Educational Resources), and advice on what should teachers learn during this phase of teacher education. Finally, GEW informs teachers of recent publications and media to support their teaching e.g. Between the Chairs (*Zwischen den Stühlen*) is a documentary film about three teachers' experiences of preparatory service. Finally, the Max Traeger Foundation (*Max-Traeger-Stiftung*) provides funding for academic research on educational themes for all types of schooling e.g. Early Years, Higher Education and Vocational Education and Training. It also supports the production of literature on topics such as inclusion. The foundation is funded partly through the GEW membership fee.

Continuous professional development is organised at the state level. In most of the federal states, GEW teacher training is done in cooperation with the public-funded State Institutes (*Landesinstitute*). These institutes run seminars, meetings, workshops on a variety of themes. However, in Hesse and North Rhine Westphalia, the state government does not fund a State Institute, but has opened up the teacher training market to private providers. Consequently, the GEW associations in these two federal states have founded their own training institutes. In Hesse, the Teacher Academy (*Lehrkräfteakademie*) provides training and counselling on themes such as: School Development; Lesson Development; Reading, Writing and Mathematics; Media Training; Special Education and Inclusion; the Integration of Pupils with a Non-German Native Language; Career and Study Orientation; All-day Schools; Subject Knowledge and Subject Didactics.

In addition to the training provided by the State Institutes, the GEW organises its own courses in response to members' needs. These needs are identified by the GEW association officers, who have knowledge of the local schools, or the members themselves. In Berlin-Schöneberg, the GEW association offers seminars on themes such as: Refuge, Migration, Extremism (Antisemitism in Berlin Schools – Causes, Forms and Responses; Islam, Islamism and Islamophobia; Refugee Children – between Trauma and Resilience; Think Differently: Political Training Against Antisemitism); for specific member groups (Fit for Retirement!; Conflicting Parent Conversations; My Appearance as a Teacher; Systematic Supervision and Coaching; Career-Long Health – Work-Life Balance; The Art of Mediation); for schools (Handling Aggression and Violence in School; The Berlin Route to an Inclusive School; Leaders in Dialogue: Lead and Guide in a Team; Attention Training: Help for Children with Attention Problems; What Makes Children Strong? Resilience); digitalisation; and a range of seminars for different levels and types of educational institutions (e.g. Study and then a Doctorate?; Dealing with Sexuality in Kindergarten; First Aid for Trainee Teachers). In addition, the GEW association in North Rhine Westphalia is the largest provider of school leader training in Germany. In larger federal states such as this, training is also offered at a more local level.

SOCIAL DIALOGUE

GEW has been at the forefront of discussions on teacher education policy since the 1990s. At the national level, social dialogue is conducted between the GEW head office in Frankfurt and the KMK. This relates largely to professional standards and the direction of teacher training. The KMK seeks to find consensus between all political parties at the state level, however there are differences of opinion on certain aspects of teacher education. The Social Democrats want a more inclusive education system in which special educational needs training is a core part of teachers' university studies. The Christian Democrats would like special needs teachers to have their own teacher education programme. Ultimately, the KMK can only give recommendations for what the federal states should do; the federal states may choose whether or not to follow these. At the state level, social dialogue takes place when there are policy proposals to change initial teacher education. In such cases, the GEW associations are allowed to provide a written policy response to draft legislation and debate laws and bi-laws in parliament. The GEW believes that social dialogue could be better at both national and state level. At the national level, particularly, the government tends to consult business and industry actors more than those who work in schools.

In recent times, GEW has advocated reform through the Future Forum for Teacher Education (*Zunkunftsforum Lehrer_innenbildung*). Active between 2014 and 2017, the Forum involved students, trainee teachers, teachers, study seminar leaders, university teachers, further educators, GEW officials and experts. The goal of the Forum was to formulate innovative guidelines for an inclusive teacher education and propose strategies for their implementation. The final report entitled 'Good education for a democratic, inclusive and social society' (*Gute Bildung für eine demokratische, inclusive und soziale Gesellschaft*) concluded that teacher education must address the challenges of a migration society. First, it called for greater diversity in the classroom and the staff room. Second, it promoted an inclusion-oriented teacher education, which is oriented to school levels rather than school types, deals with difficult developmental, learning and socialisation processes, and introduces mother-tongue and native languages into the classroom. Finally, it highlighted the need to better integrate theory and practice and give phases 1 and 2 the same value and length. Although the Forum met with members of various political parties, it has so far had more influence within the union than outside it.

Almost 70% of teachers in Germany are women and gender policies are particularly important to GEW. Yes-13 (Ja-13) is a campaign to get primary teachers the same civil service grade as other teachers. More generally, the GEW supports a more gender-sensitive teacher education and is demanding that all teacher education programmes are at least eight semesters in length. GEW is also campaigning for more time and financial support for teachers' continuous professional development as part of its 'Education. Think Again!' (*Bildung. Weiter denken!*) campaign to increase public investment in education.

ITALY

ITALY'S EDUCATION SYSTEM: CHALLENGE AND REFORM

Italy's education system faces a number of challenges with substantial policy reforms in recent years following many years of underfunding. According to PISA 2015 data, school students in Italy perform below the OECD average in the areas of science and reading and around the OECD average in maths. Attainment gaps are significant but generally lower than in other comparable systems. They are at their sharpest in relation to gender and by regions, reflecting divisions between the North and South of the country. The proportion of children in pre-school settings is above the OECD average and Italy has long had a reputation for high quality provision and innovative pedagogical practice in the early years. However, school drop-out rates are well above average and participation rates in third-level education are amongst the lowest in the European Union. Italy's schools are also responding to a significant increase in migration to the country. In 2006, 3.8% of school students were from migrant backgrounds, with this figure increasing to 8% by 2015.

Many of the problems, which affect Italian education at all levels, cannot be adequately understood without recognition of the long-term problem of underinvestment. While funding problems are historic, this situation worsened significantly after the economic crisis with cuts in absolute funding between 2009 and 2013. In 2013, Italy devoted 4.0% of GDP to education, a figure substantially below the OECD average. This situation is at its worst in the higher education sector where the government allocates just 0.3% of GDP and 0.7% of total government expenditure to universities and related sectors (OECD/European Commission, 2017). Since this time, there has been some additional investment, especially linked to specific reforms, but this is not always enough to replace previous lost funding and it is not always clear if the funding is genuinely 'new money' (or rather existing funding that is re-allocated).

Given the above situation, the consequences for teachers might be as expected. Teachers are poorly paid; primary and secondary teachers earn 65% and 72% respectively of the average salary of those with a tertiary education (OECD average is 81% and 89%). Teachers also report having less access to professional development than their peers in other OECD countries – TALIS 2013 data indicates that 75.4% of Italian teachers had accessed professional development in the previous 12 months compared to the TALIS average of 88.4% (OECD, 2014).

It is against this background that recent reforms must be assessed. These have been substantial and have had a major impact on Italian teachers, affecting everything from teacher training and professional development to the curriculum and school governance. The most significant set of reforms are those associated with the *La Buona Scuola* legislation (Law 107/15) introduced by the Renzi government in 2015. These promoted increased school autonomy and accountability. School leaders (*dirigenti scolastici*) were given increased responsibility for managing budgets and staff. One-off merit payments were introduced for a quota of the teachers judged to be best performing, while a requirement for professional development was introduced which was intended to be 'mandated, permanent and structural'. There was also substantial reform to broaden the curriculum and increase the work placement component for students. In parallel, a system of school evaluation was introduced (*Sistema nazionale di valutazione*) and substantial changes were made to teacher education. The 2017 Education and Training Monitor (European Commission, 2017b) reports that graduates with a *laurea magistrale* can compete for access to a three-year teacher education programme run jointly by universities and schools (*Percorso triennale di formazione, inserimento e tirocinio*). This programme includes formal training and a school-

based apprenticeship with the expectation that a permanent post will be awarded following successful completion of the programme.

Some aspects of these reforms had a degree of merit, in particular the efforts to address the high levels of precarious employment faced by many teachers. However, on the whole, the reforms were highly controversial and contested by education trade unions and students. Objections focused on the way that the reforms invested too much discretion in the hands of the school leader which disrupted the more collegial and democratic way that schools had traditionally worked in Italy. The introduction of performance-related pay and the proposals for professional development were seen as divisive, while there were also concerns that some measures encouraged system privatisation.

The *Buona Scuola* reforms were introduced as part of a 'public debate' about the future of education. However, the debate revealed a high level of opposition to the reforms and eventually the government guillotined the discussion and forced the legislation through parliament. This action reflects a wider unwillingness to engage with teachers and their unions about policies impacting schools and education. Collective bargaining had already been suspended following the economic crisis and the refusal respond to union concerns with regard to the Buona Scuola reforms indicated that the government was not willing to engage with teachers on professional and policy issues. Further illustration of this was provided by the experience of Italian education trade unions' involvement in European policy processes including the European Semester. The European Semester has made education-related Country-Specific Recommendations in five of the eight Semester cycles, but Italian education trade unions have had almost no input into this process. Commenting on this situation, Stevenson et al (2017) described social dialogue in Italy as 'fragile' and in a 'state of disrepair'.

EDUCATION TRADE UNIONS MEETING TEACHERS' PROFESSIONAL NEEDS: COLLECTIVE BARGAINING AND OTHER STRATEGIES

Prior to the elections in March 2018, there were significant developments in education. The hope was that new possibilities were opening up for the promotion of teachers' professional status in Italy. Most significant was the signing of a new collective labour agreement between the Ministry of Education, Universities and Research (MIUR) and the education trade unions. This agreement covers the years 2016-2018, and it is hoped that a further three-year agreement will follow. The new collective agreement is significant principally for two reasons. Firstly, it restores collective bargaining after a period of nearly 10 years during which this democratic right for Italian educators had been denied. Secondly, it broadens the range of bargaining issues over which the unions have been involved and therefore opens up the possibility of addressing many of the problems caused by *Buona Scuola* reforms.

The new collective agreement has the potential to begin to address the salary stagnation that has affected teachers in Italy since the economic crisis. However, it also tackles many of the issues that have led to an increase in managerialism in Italian schools such as investing too much authority in school leaders at the expense of teachers and using divisive forms of accountability that have created fractures in schools. For example, Law 107/15 made professional development compulsory for teachers with the priorities being determined by the MIUR's National Training Plan. Implementation was determined at school level by the school leader. Teachers had little ownership or control of this process, either collectively as a profession or individually as teachers. As a result of the new collective agreement, the Board of Teachers has the key role in shaping the professional development offer for teachers.

"The Board of Teachers has the full right to promote updating initiatives . . . and to define the training plan: there is no other person [or body] that can do it. It decides the contents, the procedures for the development of the training and the criteria for participation. This means that even the same definition of the training units . . . is in the full faculty of the teaching staff. " 4 (FLC- CGIL)

At the same time, the process of implementation of the National Training Plan at school level is now to be the outcome of a negotiation between the school leader and the school's *Rappresentanze Sindacali Unitarie* (an elected body of worker representatives, usually drawn from trade union lists of candidates and elected on three-year cycles). The consequences of all these changes is the removal of control of professional development from the MIUR and individual school leaders. This will provide teachers and their unions with a significant influence over professional development opportunities and how these are experienced by teachers.

It is clear from the above that an important way in which Italian education trade unions are able to support the professional needs of their members is through the vital function of collective bargaining. Although social dialogue in Italy has been debased in recent years, and remains fragile, the new collective agreement must provide hope that social dialogue is being re-established (see comment below). Moreover, the new collective agreement has a wide scope of issues and so can demonstrate how Italy's education trade unions are able to use collective bargaining in order to address issues such as professional development.

In addition to this vital role it is possible to identify several other strategies pursued by Italy's education trade unions that both directly, and indirectly, seek to meet the professional needs of teachers. One of the most significant of these is the *Istituto per la Ricerca Accademica, Sociale Ed Educativa* (IRASE) which is a body run in conjunction with UIL-Scuola and accredited by the Ministry of Education with expertise in several areas including didactics and methodologies, didactic innovation and digital teaching and problems of individual and system evaluation. Specifically, it provides:

1. training, updating, tutoring and consulting activities for school staff of all levels and professional training;

2. preparation activities for the candidates for entry to the role posts, related to the functional qualifications, foreseen for the staff of the school sector (http://www.irasenazionale.it/chi-siamo)

The courses and programmes available cover a wide range of issues from skills and knowledge development through to those focused more explicitly on career progression (such as leadership preparation programmes). The formats are flexible including face-to-face, online and blended provision. Where interested parties wish to commission courses, these can be discussed and, subject to questions of viability, bespoke courses can be provided.

Most recently *IRASE* became a member of the newly established National Forum of Professional Associations of Teachers and School Leaders (*FONADDS*) highlighting its significance and reach as a national body providing high-quality professional development opportunities for teachers and school leaders.

In addition to *IRASE*, all the education trade unions in Italy offer a range of ways to meet the professional needs of teachers through conferences, seminars, workshops and publications. For example, CISL Scuola publishes a regular journal *Scuola e Formazion*e dealing with policy and professional issues for teachers,

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4 http://www.flcgil.it/scuola/la-formazione-del-personale-della-scuola-le-competenze-del-collegio-e-della-contrattazione.flc

while it also publishes an annual report, Agenda, looking at complex policy issues in greater detail. The union also provides a rich range of regional meetings and seminars in which teachers can engage in professional discussions. These combine both traditional 'training' as well as events that are more open and polemical in which topical issues of interest are discussed.

Federazione Lavoratori della Conoscenza (FLC-CGIL) is similarly involved in supporting teachers' professional needs and provoking debate about the professional issues that frame teachers' working lives. A recent example was the organisation of a major national conference, which took place just a few days after the 2018 general election, under the title '*The school that will come*' (*La Scuola che verrà*). The conference sought to 'relaunch the school of the Republic' (FLC-CGIL online 2018), based on a rejection of the trajectory charted by Law 107/15. Significantly, it recognised that if Italy's schools are to fulfil their historic mission to the Constitution, the conference needed to confront questions of pedagogy, teaching and democratic governance. In summary, the need for teachers to have both professional support and autonomy to perform their role. In opening up these spaces for debate education trade unions create the opportunities for teachers to discuss professional issues in ways that are not always possible in other fora.

ITALIAN EDUCATION TRADE UNIONS MEETING THE PROFESSIONAL NEEDS OF TEACHERS: SUMMARY AND CURRENT ASSESSMENT

This case study highlights how education trade unions in Italy have worked to meet the professional needs of teachers. This is work that has been undertaken in very difficult circumstances. Italian education is poorly funded, and that situation has deteriorated since the economic crisis. At the same time, social dialogue has been debased and radical and unpopular reforms have been imposed on teachers. Throughout all this time the education trade unions have sought to meet the professional needs of their own members by directly providing training, but also seeking to 'reframe the narrative' about the importance of the public school and the important work of teachers. This was demonstrated recently when all three unions featured in this report participated in a campaign to present an education manifesto in 2017 under the title '*The School is Open to Everyone*' (*La Scuola è aperta a tutti e a tutte*). It can be hard to quantify the impact of this campaign, but it is significant that, in the 2016-2018 *Contratto Collectivo Nazionale Lavoro* (national collective agreement), there is a clear commitment to the school as the centre of an educational community, rather than as a business enterprise, which was the direction of the *Buona Scuola* changes. This collective agreement represents a significant development and a step back from the days when social dialogue had been dismantled. However, its commitment to schools as places of democratic participation and collegial professional relations is also a clear recognition of the need for teachers to have a strong voice on professional issues. There are therefore some reasons to be hopeful. However, at the same time there is also a need for vigilance. On 18th April, the MIUR published a major report 'Professional development and quality of in-service training' (MIUR, 2018) with significant implications for teachers. Despite its potential impact on the teaching profession, education trade unions had not been involved in the preparation of the report. The extent to which education trade unions in Italy have a meaningful input into the policies that might flow from this document will be the test of whether there is a 'new start for social dialogue' (European Commission, 2016b) in Italy.

At the time of writing the education trade unions have asked for urgent discussions with the new government to address pressing issues across the education sector, not least the need to negotiate and adequately resource a new national contract for 2019-2021. As such the economic and political environment facing Italian teachers continues to be extremely challenging.

POLAND

Poland's education system has experienced considerable change in the period since 'transformation' (when Poland emerged from its years as part of the Soviet bloc). Change has often felt like a 'permanent revolution', although it is possible to identify three significant periods of reform: 1999, 2008, and 2014 onwards (Jakubowski and Wisniewski, 2017).

In 1999, school structures were changed in order to extend the period of comprehensive education and increase school autonomy (Jakubowksi et al. 2010). There was greater system decentralisation (with responsibility devolved to local government) and also substantial examination reform. Local government appoints principals and principals employ and manage teachers independently, although pay and staff funding issues are determined centrally. Teachers experienced significant changes when at the same time a new scheme for teachers' remuneration and career development was introduced. During this time, teachers were given increased autonomy to choose their own teaching materials and to plan their lessons. This was intended as a significant move towards a more decentralised system in contrast to the pre-transformation era. As a result of these reforms, teachers in Poland have experienced above average levels of teacher autonomy when compared to other OECD countries (OECD/European Commission, 2015).

The most significant change for teachers was the introduction of a four-level teaching scale, with each level linked to differences in pay (*Karta nauczyciela*). Teachers must demonstrate they meet several criteria as they progress from one level to the next, and this requires teachers to generate appropriate evidence in the form of a portfolio. The introduction of this system has resulted in teachers being sharply focused on meeting the requirements of the system, and this in turn has led to high levels of demand for professional qualifications. In Poland, a high proportion of teachers have Masters degrees and teachers are known as an occupational group with the highest level of demand for postgraduate study and professional learning. For example, 94% of teachers participate in professional learning, compared to 88% as the OECD average (OECD/European Commission, 2015).

The system has now created an 'inverted pyramid' with more than half of all teachers on the highest grade and many fewer on lower grades. There is some evidence that the system is leading to cynicism amongst teachers who feel the pursuit of higher grades is onerous and bureaucratic (interview evidence from project research visit in October 2017). There is also a concern that, as the numbers of teachers on the chartered grade increase, a form of rationing is being introduced with the length of time required to achieve the highest level being extended. These concerns have been vindicated more recently as government proposals for reform of the *Karta nauczyciela* system look to place additional burdens on teachers, making career progression both a slower and more difficult process. Teachers in Poland already earn below OECD average salaries when compared to other graduate qualification occupations (OECD/European Commission, 2015).

The 2008 reforms represented further substantial changes to the Polish school system as international trends and assessments had increasing influence on Polish education. Some have argued that the principal impact of the curriculum reforms at this time was to enhance teacher professionalism and autonomy, while also encouraging a shift away from a narrow knowledge focus and towards broader skills such as critical and analytical thinking (Jakubowski and Wisniewski, 2017). Alongside all these reforms, there has been a steady increase in the provision of early years education.

Clearly, there have been many developments in Polish education since the period of transformation and it is difficult to ascribe any systemic improvements to any particular reform. However, the European

Commission has claimed 'the overall education performance is strong' (European Commission, 2017c, p 4) and advocates argue that Poland's impressive performance (described by OECD/European Commission (2015, p 4) as 'rapid improvements') in international assessments can be largely attributed to the reforms introduced in 1999 and 2008. Given this achievement, it is difficult to understand why more recent reforms (2014 onwards) threaten to jeopardise this, by apparently putting earlier reforms into reverse (Jakubowski and Wisniewski, 2017). This is best illustrated by the changes to school structures that reverse the commitment to extending comprehensive education. These dramatic changes, and the school closures that have resulted, have led to redundancy for many teachers. Alongside these changes, the power of the inspectorate has been strengthened, leading to concerns that a return to pre-1989 centralisation is underway. Furthermore, significant curriculum changes have been introduced, including the introduction of a new history curriculum that many teachers consider to be politically divisive (*Financial Times*, 2017).

At the time of writing education policy in Poland continues to be highly contentious with significant implications for the professional autonomy, the professional status of teachers and the working conditions of teachers. In 2016 there were significant protests by teachers and parents (Reuters, 2016) and many of these anxieties remain unaddressed.

EDUCATION TRADE UNIONS IN POLAND

There are several teachers' unions in Poland, three of which are affiliated to ETUCE and to Education International. *Krajowa Sekcja Oświaty i Wychowania NSZZ "Solidarność"* – National Education Section NSZZ "Solidarność", *SKOiW "Solidarność", Krajowa Sekcja Nauki NSZZ "Solidarność"* – National Science Section NSZZ "Solidarność", KSN "Solidarność" and *Zwiazek Nauczycielstwa Polskiego* (ZNP). The focus in this report is on *SKOiW "Solidarność"* and ZNP which are the two unions that organise in the school sector (KSN is a higher education sector union).

Polish education trade unions are involved in social dialogue processes with the Ministry and local government in relation to the professional issues facing teachers. The Polish constitution commits the country to the '*solidarity, dialogue and co-operation of social partners*'[5]. At the national level, there is a Social Dialogue Council and this also has sectoral equivalents, including for education. Towards the end of 2016 the inaugural meeting of the Group for Professional Status of Education Employees took place. This provided an opportunity for important issues facing Polish teachers to be discussed by the representatives of trade unions, the government and local authorities. One of the positive outcomes of these meetings is the first increase in teacher's salaries since 2012. A further step for the Group for Professional Status of Education Employees will be to review the system of teachers' salaries, which at the moment is complicated. Discussions are still ongoing on this issue.

Education trade unions in Poland seek to engage with these processes and use them to meet the professional needs of teachers. However, some unions see government commitment to social dialogue as erratic. For example, ZNP officials are critical of current social dialogue arrangements and believe they have been marginalised by the government.

Both *SKOiW "Solidarność"* and ZNP have a strong and long-established commitment to meeting the professional needs of their members.
For *SKOiW "Solidarność"*, this is work is largely undertaken through an institute established by the union for this purpose - *Instytut Promocji Nauczycieli "Solidarność*. The institute has three different elements to its work:

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5 https://www.mpips.gov.pl/en/social-dialogue/

- *Instytut Doskonalenia Nauczycieli „Solidarność"* is a national institute focused on providing accredited professional development to teachers and union members (who are entitled to reduced rates). Teachers can acquire formal qualifications through the Institute and, as the organisation has Ministry of Education recognition, all relevant qualifications can support career development and progression. The institute is based in Gdansk, but operates across Poland through more than 20 branches in the regions. Courses are provided on information technology, health and safety, career progression, school evaluation, classroom and behaviour management, and education management.

- *Przegląd Oświatow* is the union's bi-weekly magazine. The publication discusses key educational topics of the day and reports union policy on professional issues. It is a vital means by which the union seeks to inform and shape the education policy debate in Poland.

- *Instytut Badań Społecznych „Solidarność"* acts as the research arm of SKOiW "Solidarność". Researchers within the institute conduct sociological research among teachers and they prepare and publish reports on all aspects of education policy and teachers' working lives. The union is able to use this research to advance its case for meeting the professional needs of teachers.

ZNP similarly has its own training centre which is organised through 11 individual branches across the country. The institute provides a range of training programmes for teachers, which are mostly provided for teachers directly in their schools. In the last full year 2016-17, the ZNP's institute provided training for 3,000 teachers.

Another example of ZNP's support for the professional development of teachers is through the assistance provided by the union for teachers seeking career progression in the *Karta nauczyciel*a. The union did not support the introduction of the four-level teachers' pay structure in 1999 (see above) but it realised that union members would need considerable support if they were to make successful progress up the new career structure once it was introduced. Progression required teachers to produce a portfolio of evidence against a range of criteria. Such documentation of this type and form had not previously been required previously. The union immediately committed substantial resources to supporting teachers navigate this process, particularly in the first tranche when large numbers of teachers wanted to make the progression as soon as possible. The support included seminars and workshops as well as a range of publications. Much of this work was provided in localities as the union recognised the need to decentralise its resources to the regions and communities. It proved to be very effective for Polish teachers and is now provided on an on-going basis by ZNP. Obviously, in subsequent years, and after the initial wave, the number of teachers looking to make progress has reduced but helping teachers through this process remains an important aspect of the union's work.

One novel example of the union's provision for its members is the establishment of a *Young Trade Unionist Academy* developed to support young teachers as members of the union. This programme has successfully managed two cohorts of students and, at the time of writing, a third group is about to commence. The Academy involves a group of young teachers who meet several times a year for extended workshops. The programme requires participants to undertake projects in between workshops and several of these focus on campaigns around professional issues. It also involves a week-long international visit to Germany where course participants are hosted by members of the *IG Metall* and *GEW*. It is important to recognise that the programme is aimed principally at the development of members for future leadership roles in the union. However, there is no simple division between 'union training' and 'professional training', with evidence from elsewhere that training for 'union purposes' often has a beneficial impact on the participant as a teacher. As one *ZNP* official said, '*the course aims to produce better trade unionists and better teachers*'.

ZNP works hard to promote professional issues in the public discourse and, through this, to help shape education policy that impacts teachers. The ZNP is helped in this task because the union's weekly newspaper *Glos Nauczycielski* (*Teachers' Voice*) is considered the most important specialist media outlet on education in Poland. The journal is read widely by teachers and educationalists across the country and beyond the union. It is known for publishing a wide range of articles, many of which focus on pedagogical and professional issues. This allows the union to influence the public discourse on education policy issues and thereby indirectly address the professional needs of teachers. The union also seeks to 'shape the discourse' by working with civil society organisations that influence education policy. One example is the recently formed 'Evidence Institute' (www.evidenceinstitute.eu) which is an independent research institute which aims to ensure that education policy in Poland is based on a sound evidence. This type of work is considered particularly important at a time when government policy in education rejects the professional views of many educators. *ZNP* has contributed to a number of reports on education policy issues in partnership with the Evidence Institute under the banner of '*The Benefits of Education*'.[6]

ZNP supports the professional needs of its members also through the publication of learning materials and professional development resources that directly address the needs of Polish teachers at the current time. For example, the union has produced a series of publications on key issues for teachers entitled '*Readings about Education*'. The first publication in 2011 was on discrimination and subsequent publications have focused on privatisation, professional ethics and, most recently, history in the curriculum. Given the controversial nature of changes in the history curriculum indicated above, this publication written by teachers, union officials and academics is seen as an important resource for teachers who want to maintain an independent and critical pedagogical approach to the teaching of history. All the '*Readings*' are available free online.

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6 The reports are available at - http://znp.edu.pl/projekty/korzysci-z-edukacji/

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8. APPENDIX: RESEARCH METHODS AND DATA COLLECTION

Data for this study was collected from two sources. A survey was distributed to all ETUCE member organisations. The online survey was available in three languages (English, French and Russian) and had closed and open text responses. Surveys were received from 51 member organisations representing education trade unions from across Europe and a list of respondents are included in Table 7. In addition data was collected at each of the two day workshops that took place as part of the project. These workshops took place on

- **Warsaw**, Poland   27-28 November 2017

- **Berlin**, Germany   5-6 March 2018

- **Rome**, Italy   26-27 April 2018

There were a total of 112 participants at the three workshops and data was collected from keynote presentations and workshop discussions. A full list of all unions participating in the workshops is presented in Table 8. In addition to the survey and workshops relevant documentation was collected from ETUCE unions, and national and European policy documents.

SURVEY RESPONDENTS: TRADE UNIONS

Country	Name
Albania	Trade Union Federation of Education and Science of Albania
Albania	Independent Trade Union of Education of Albania
Austria	Gewerkschaft Öffentlicher Dienst
Belgium	Christelijk Onderwijzersverbond
Bulgaria	Bulgarian Union of Teachers (SEP-Podkrepa)
Cyprus	Kıbrıs Türk Orta Eğitim Öğretmenler Sendikası
Cyprus	Cyprus Turkish Teachers' Trade Union
Czech Republic	Českomoravský Odborový Svaz Pracovníků Školství
Denmark	Gymnasieskolernes Laererforening
Denmark	The Danish National Federation of Early Childhood Teachers and Youth Educators
Estonia	Eesti Haridustöötajate Liit
Finland	Opetusalan Ammattijärjestö
France	Fédération Formation et Enseignement Privés
France	Syndicat National des Enseignements de Second Degré
FYROM	Trade Union of Education, Science and Culture
Germany	Gewerkschaft Erziehung und Wissenschaft
Germany	Verband Bildung und Erziehung
Greece	Federation of Secondary School Teachers of Greece
Hungary	Syndicat des Enseignants de Hongrie
Hungary	Teachers' Democratic Union of Hungary
Iceland	Kennarasamband Islands
Ireland	Teachers' Union of Ireland
Ireland	Irish Federation of University Teachers
Israel	Israel Teachers Union
Italy	UIL Scuola
Latvia	Latvijas Izglītības un zinātnes darbinieku arodbiedrība
Lithuania	Federation of Lithuanian Education and Science Trade Unions
Lithuania	Lietuvos mokytojų, švietimo ir mokslo profesinė sąjunga
Luxembourg	Syndicat National des Enseignants
Montenegro	Trade Union of Education of Montenegro
Netherlands	Algemene Onderwijsbond
Norway	Utdanningsforbundet
Poland	Sekcja Krajowa Oświaty i Wychowania NSZZ "Solidarność"
Portugal	Federação Nacional dos Sindicatos da Edução
Portugal	Sindicato dos Professores do Norte

Country	Name
Portugal	Federação Nacional dos Professores
Portugal	Sindicato Democrático Professores
Republic of Armenia	Republican Union of Trade Union Organisations Workers of Education and Science of Armenia
Republic of Kazakhstan	Kazakhstan Trade Union of Education and Science Workers
Republic of Krygyzstan	Trade Union of Workers of Education and Science of the Kyrgyz Republic
Romania	Federatia Educatiei Nationale
Serbia	Autonomous Union of Employees in Science and Research
Serbia	Teachers' Union of Serbia
Slovakia	Independent Trade Unions of Slovakia
Slovakia	Odborový zväz pracovníkov školstva a vedy na Slovensku
Slovenia	The Education, Science and Culture Trade Union of Slovenia
Spain	Unión General de Trabajadores
Sweden	The Swedish Association for University Teachers and Researchers
Turkey	Eğitim Sen
UK	University and College Union
UK (England and Wales)	National Education Union (NUT section)

WORKSHOP PARTICIPANTS: TRADE UNIONS

Country	Name
Albania	Independent Trade Union of Education of Albania
Albania	Trade Union Federation of Education and Science of Albania
Austria	Gewerkschaft Öffentlicher Dienst
Belgium	Christelijk Onderwijzersverbond
Belgium	Christelijke Onderwijscentrale
Belgium	Syndicat Libre de la Fonction Publique - Vrij Syndicaat van het Openbaar Ambt
Bosnia and Herzegovina	Sindikat srednjeg i visokog obrazovanja, odgoja, nauke i kulture BiH
Bosnia and Herzegovina	Samostalni Sindikat Visokog Obrazovanja i Znanosti Bosne i Hercegovine
Bosnia and Herzegovina	Samostalni Sindikat Osnovnog Obrazovanja I Odgoja Bosne I Hercegovine
Bulgaria	Bulgarian Union of Teachers (SEP-Podkrepa)
Bulgaria	Syndicat des Enseignants Bulgares
Croatia	Nezavisni sindikat znanosti i visokog obrazovanja
Cyprus	Organisation of Secondary School Teachers of Cyprus
Cyprus	Cyprus Greek Teachers' Organisation
Czech Republic	Českomoravský Odborový Svaz Pracovníků Školství
Denmark	Gymnasieskolernes Laererfor+ening
Denmark	The Danish National Federation of Early Childhood Teachers and Youth Educators
Estonia	Eesti Haridustöötajate Liit
Estonia	Federation of Estonian Universities, Institutions of Science, Research and Development
Finland	Opetusalan Ammattijärjestö
France	Union nationale des syndicats autonomes - Education
France	Syndicat National des Enseignements de Second Degré
France	Fédération Nationale de l'Enseignement, de la Culture et de la Formation Professionnelle - Force Ouvrière
France	Syndicat national unitaire des instituteurs, professeurs des écoles et PEGC
FYROM	Trade Union of Education, Science and Culture
Germany	Gewerkschaft Erziehung und Wissenschaft
Germany	Verband Bildung und Erziehung
Greece	Federation of Secondary School Teachers of Greece
Greece	Greek Primary Teachers' Federation

Country	Name
Hungary	Workers' Councils Teachers' Branch
Hungary	Teachers' Democratic Union of Hungary
Ireland	Teachers' Union of Ireland
Ireland	Irish National Teachers' Organisation
Italy	Federazione Lavoratori della Conscenza
Italy	CISL Scuola
Italy	UIL Scuola
Latvia	Latvijas Izglītības un zinātnes darbinieku arodbiedrība
Lithuania	Federation of Lithuanian Education and Science Trade Unions
Malta	Malta Union of Teachers
Montenegro	Trade Union of Education of Montenegro
Netherlands	Algemene Onderwijsbond
Norway	Utdanningsforbundet
Poland	Sekcja Krajowa Oświaty i Wychowania NSZZ "Solidarność"
Poland	Zwiazek Nauczycielstwa Polskiego
Romania	Fédération des Syndicats Libres de l'Enseignement
Romania	Federația Națională Sindicală ALMA MATER
Serbia	Autonomous Union of Employees in Science and Research
Serbia	Teachers' Union of Serbia
Slovakia	Independent Trade Unions of Slovakia
Slovakia	Odborový zväz pracovníkov školstva a vedy na Slovensku
Slovenia	The Education, Science and Culture Trade Union of Slovenia
Spain	Federación de Enseñanza CC.OO.
Spain	Central Sindical Independiente de Funcionarios. Sector de Enseñanza
Sweden	Lärarnas Riksförbund
Turkey	Eğitim Sen
UK	Educational Institute of Scotland
UK (England and Wales)	National Education Union (NUT section)