

## **ANNEX 1 : ETUC SEMESTER TOOLKIT 2.0 - Influencing the European Semester**

### **MAIN TRADE UNION CHALLENGES WITH THE EU SEMESTER**

The ETUC Semester Toolkit 2.0 (“the toolkit”) is a new work method aimed at securing greater trade union influence in the decision-making process of the Economic Governance of the EU via the implementation of a trade union agenda for growth and social progress.

The Toolkit identifies four tools through which the ETUC and its members can operate in a more coordinated and structured way for an influential presence at the milestones of economic governance, mainly in the EU Semester.

Reinforcing the social agenda of economic governance is still a difficult challenge for the trade union movement. As long as the current narrative remains unchanged, economic considerations continue to prevail over the social dimension. The challenge for us is therefore to change this.

Social dialogue can be a driving force for successful, sustainable and inclusive economic, employment and social policy-making. The Quadripartite Declaration on “A New Start for Social Dialogue” insists on the role of the social partners for the social dimension of EU economic governance to materialise.

Further progress is needed at national level to ensure that national consultations amongst social partners are organised in a more consistent and structured manner at the different stages of the Semester process. A common approach can only be built together. This document must therefore be seen as ‘work-in-progress’. The Toolkit can be adjusted on the basis of practice and experiences gained in the course of its implementation.

### **FROM THEORY TO PRACTICE: FOUR WORKING TOOLS FOR A COMMON APPROACH**

A greater trade union influence on the European Semester can only be achieved through coordinated action between the ETUC and its members, moving from an approach based merely on reacting to policy documents, to a more proactive attitude. The new approach is twofold. First, the ETUC and the national trade union organisations need to put forward their demands for influencing the milestone documents of the Semester at an early stage. Second, once those documents are published, the ETUC and its affiliates will carry out an assessment, based on the inputs they provided the Commission. This will help make the Commission, the Council and the Governments more accountable for the outputs of the European Semester.

More specifically, the following toolkit implements a method of work through which trade unions may act in a more coherent and timely manner. In addition, thanks to web-based applications, the new toolkit simplifies the coordination process and enables the best use of resources. The toolkit includes working methodologies, timeframes, reporting templates and web support.

Economic governance is mainly the coordination of national policies. The main beneficiaries of the ETUC toolkit are therefore national affiliates of the ETUC.

A new method of work must be based on:

- Ownership of the process amongst the ETUC affiliates
- Involvement of ETUC affiliates in each phase of the European Semester
- Transparency of the process at all levels

All ETUC affiliates should appoint a Trade Union Semester Liaison Officer (TUSLO). The TUSLO is responsible for the following tasks and for implementing the ETUC toolkit to cope with the European Semester in their own organisation:

- Liaising with the ETUC at the milestones of the European Semester;
- Providing the national inputs for early-stage consultations on Country Reports in November;
- Liaising with other ETUC affiliates at national level with the aim of arriving at a single national position on an issue, where possible;
- Liaising and coordinating consultations with the European Commission (European Semester Officers and national visits);
- Regularly reporting on consultations with governments in the framework of the European Semester.

The TUSLOs will not constitute a new ETUC Committee, but they will have priority in terms of attending meetings concerning the EU Semester. They can be involved in training and seminars to exchange experiences, evaluate the methodology and improve the ETUC action within the Semester.

### **TOOL ONE: ETUC for Growth and Social Progress**

#### **Early-stage contribution to and assessment of the broad economic guidelines**

1. Target: Influencing, assessing and reacting to the Annual Growth Survey (AGS), Euro-area-specific recommendations, Alert Mechanism Report (AMR) and Joint Employment Report (JER).

*Timeline:*

*1<sup>st</sup> July: Every year, the ETUC Secretariat issues a first proposal for early-stage consultation on the upcoming AGS. The document entitled "ETUC for Growth and Social Progress" is based on inputs received from the concerned permanent committees.*

*1<sup>st</sup> September: The ETUC Secretariat issues the final version of the document "ETUC for Growth and Social Progress"*

*Mid-September - October: Consultation on the AGS + Tripartite Social Summit (TSS)*

*Mid-November: Publication of the AGS*

*End-November: ETUC assessment of the AGS published and Consultations on AGS (EMCO – Employment Committee of the European Council; SPC – Social Protection Committee of the European Council)*

*ETUC committees involved: Economic Policy Committee, Employment and Labour Market Committee, Coordination of Collective Bargaining and Wages Committee and the Social Protection Committee. Other relevant committees and interest groups will be consulted and will provide written contributions to be coordinated by the ETUC secretariat.*

2. The broad economic guidelines set the socio-economic scenario in which the Semester takes place. Early-stage consultation on the possible content of the socio-economic guidelines will be based on the document "ETUC for Growth and Social Progress". The ETUC committees are invited to identify main challenges and policy drivers that should

be prioritised under the forthcoming Semester. The four committees mentioned above will prepare the draft document, but other committees and/or working groups can contribute as well.

3. Structure of the yearly document “*ETUC for Growth and Social Progress*”.

OUTPUT 1	ETUC for Growth and Social Progress
Chapter 1	General economic analysis and main social/societal challenges
Chapter 2	<ul style="list-style-type: none"> <li>• Situation regarding trade union fundamental rights in Europe</li> <li>• Overview of the involvement of social partners in Europe</li> </ul>
Chapter 3	Thematic issues: <ul style="list-style-type: none"> <li>• Stability and convergence</li> <li>• Collective bargaining and wages</li> <li>• Labour market and employment</li> <li>• Social policies</li> <li>• Investments, taxation, and EU2020</li> <li>• Sector inputs from ETUFs</li> </ul>

Main outputs: Output 1. Document “*ETUC for Growth and Social Progress*”

**TOOL TWO: ETUC Report on TU inputs for early-stage consultation on Country Reports Paving the way for more socially-oriented National Reform Programmes (NRPs) and Country-Specific Recommendations (CSRs)**

1. Target: Influencing the European Commission’s Country Reports and enhancing coherence between consultation on Country Reports and involvement in National Reform Programmes.

*Timeline:*

*November: ETUC members submit their national inputs for Country Reports*

*1 December: “ETUC Report on TU inputs for early-stage consultation on Country Reports” is published.*

*First week of December: Consultation on Country Reports*

*January: Dialogue and exchanges between TUs and the EC continue*

*End February: Publication of Country Reports*

*March: Joint assessment of Country Reports with the EC + EMCO + TSS*

*Process: Inputs delivered by national affiliates.*

2. Country Reports provide for extensive country-based socio-economic analysis in which the European Commission (EC) identifies evidence-based challenges that Member States have to address in order to stick to their stability/convergence objectives. For that purpose, the EC points out some policy drivers that should be transformed into concrete actions within the National Reform Programmes (NRPs) and/or through the Country-Specific Recommendations (CSRs).

3. In preparation for the consultation on the possible contents of the Country Reports, the ETUC invites affiliated organisations to provide their contributions so as to prepare the “*ETUC Report on TU inputs for early-stage consultation on Country Reports*”. At the

request of affiliates, ad hoc meetings for country focuses can be arranged with the specific services of DG Employment.

	ETUC Report on TU inputs for early-stage consultation on Country Reports”
Chapter 1	General economic analysis targeting specific national situations
Chapter 2	Country Inputs <ul style="list-style-type: none"> <li>• Country 1: Challenges, policy drivers, evidence</li> <li>• Country 2: Challenges, policy drivers, evidence</li> <li>• Country 3: Challenges, policy drivers, evidence</li> <li>• ...</li> </ul>

4. National TU inputs should be divided into topics – according to the scheme outlined in “Tool N° 2: the editable pdf template” – and structured as follows:
  - Challenges (most urgent problems the country is facing)
  - Policy Drivers (policy demands to overcome the problems identified)
  - Evidence (facts and figures that support the TU demands)
5. ETUC members from the same country are invited to deliver a single and, possibly, commonly agreed contribution. This implies that affiliates should be encouraged to adapt their internal processes accordingly.
6. Particular attention and priority for eventual consultation with DG Employment must be given to countries that have been experiencing excessive imbalances. At the request of affiliates, the ETUC will push the EC to increase dialogue with trade unions in and for these specific countries.

Main outputs: Output 2. ETUC Report on TU inputs for early-stage consultation on Country Reports.

<p><b>TOOL THREE: National Reform Programmes (NRPs) and Country-Specific Recommendations (CSRs)</b></p>
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1. Target: Monitoring the involvement of trade unions in the designing of National Reform Programmes, and stability/convergence plans and medium-term budgetary objectives. Influencing the CSRs.

*Timeline:*

*March: National consultations on National Reform Programmes*

*Second half of April: Publication of the Country Reports*

*Mid-May: Publication of the Country-Specific Recommendations*

*Process: Trade Union Semester Liaison Officers (TUSLO)*

2. At this stage, the Semester cycle foresees the issuing of the following documents:

February	Country Reports	European Commission
April	National reform programmes	Member States
April	Stability/Convergence Programmes	Member States
April	Medium-Term Objectives	Member States
May	Draft Country-Specific Recommendations	European Commission
July	Adopted Country-Specific Recommendations	European Council

3. The Commission is trying to give new momentum to the NRPs. They should be consistent with challenges and policy drivers identified in the Country Reports. Compared to CSRs, they will be larger in scope and focused on growth. There is an emerging consensus that they should be designed in consultation with social partners.
4. It is up to the national social partners and governments to establish how the social partners should be involved. The content of national consultations is a national matter and the toolkit does not intervene in that process.
5. This third tool is designed to monitor trade union involvement at national level. It is in the common interest of the ETUC members that trade unions be properly involved in all Member States and that such involvement be improved through the exchange of best practices and targeted actions in countries where governments are reluctant to establish meaningful consultation with trade unions. Peer review exercises on the involvement of social partners at national level are important to oblige governments to do more.
6. The toolkit will be supported by an online application. An online questionnaire will treat at least the following information:
- Procedures to be involved in the drafting of the National Reform Programmes and its effectiveness
    - Format of the consultation/negotiations
    - Disclosure of documents
    - Meaningful timing
    - Effectiveness of the consultation
    - Trade union capacities
    - Publicity of the trade union positions
    - Involvement in the elaboration of the CSR
7. The national contributions to this toolkit will fall under the responsibility of the TUSLO. It must be updated every year in the month of June. Results will be reported in the ETUC document for Growth and Social Progress.
8. Once the Draft Country-Specific Recommendations have been issued, the only way to change them is to submit amendments.

Normally, amendments proposed should find their justification in the consultation documents on Country Reports or NRPs. However, short explanations may be attached to the amendments proposed. The timing for putting forward amendments is extremely

strict. National TU organisations need to react rapidly to the publication of the draft CSRs proposed by the EC and lobby their governments to present their amendments at the Council meeting.

Main outputs:

Output 3. Yearly Monitoring of trade union involvement at national level

Output 4. Amendments to the Country-Specific Recommendations

## **TOOL FOUR: Communication, Dissemination, Capacity-Building**

The ETUC Semester Toolkit 2.0 will be supported by:

- Media coverage strategy
- Communication standards
- Capacity building/Continuous training

### **Media Coverage**

Media coverage will be developed in cooperation with the ETUC Press and Communication department. The strategy is to highlight trade unions' positions during the milestone steps of the European Semester. It will be based on:

- Raising the media's awareness before the publication of the AGS, Country Reports and CSRs
- Timely and straight assessment of the AGS, CRs and CSRs immediately after publication
- Press releases highlighting specific topics or country situations (for instance, with more comprehensive data, fact sheets, etc.), in cooperation with the ETUC affiliates.
- The launch of a barometer and/or observatory on trade union involvement

### **Communication standards**

- Mainstreaming the use of templates and standards for ETUC reports
- The ETUC Semester Toolkit 2.0 website will be incorporated into the current ETUC website [www.etuc.org](http://www.etuc.org).
  - o The new ETUC web portal will include a dedicated area with an Internet-based platform for:
    - information collecting
    - information sharing
    - availability of all ETUC reports
    - interactive agenda of the Semester.

### **Capacity Building**

- The ETUC, in cooperation with the ETUI, will schedule regular training sessions, especially for TUSLOs, which will focus on:
  - o Understanding the economic governance of the EU
  - o Raising awareness on the EU semester and its functioning

- Building capacities to intervene in the EU Semester at national level
- Understanding and implementing the ETUC Semester Toolkit 2.0
- Providing skills and instruments to improve the quality of national inputs
- Enhancing exchanges and cooperation between the national and European levels.

ETUC and ETUI will cooperate to offer two training courses per year to ETUC members, according to the ETUI rules and methods of work.

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