

Rhetoric or game changer:
Social dialogue and industrial relations
in education midst EU governance
and privatisation in Europe

Glossary of Terms





This Glossary of terms accompanies the study **“Rhetoric or game changer: Social dialogue and industrial relations in education amidst EU governance and privatisation in Europe”**.

Privatisation challenges the capacity of trade unions to bargain collectively and to participate in shaping education policies through well-established systems of industrial relations enshrined in the European tradition. In national and educational contexts, different terms and phrases associated with education privatisation are used to describe similar processes. Sometimes, forms of privatisation may remain ‘hidden’ or be taken for granted due to the distinctive history of a system. In a similar manner, the nature and forms of social dialogue and industrial relations are often understood differently in different contexts.

This glossary defines the main concepts adopted in the research project. The glossary is meant to serve as a guide for education trade unions in understanding and framing the issues at stake according to their specific contexts.

ETUCE-CSEE

Boulevard Bischoffsheim 15, B- 1000 Brussels
secretariat@csee-etu.org

WWW.CSEE-ETUCE.ORG

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Commercialisation is the creation, marketing and sale of education goods and services to education systems and schools by external providers. It happens in systems and in schools as opposed to happening to systems and schools (Hogan and Thompson, 2017).

Ed-tech (educational technology) refers to the industry and companies that provide educational technology for teaching and learning.

Educationalisation refers to a specific way of framing education, teaching and learning as means to solve economic and social problems in societies (skills mismatches and supply, youth unemployment, economic competitiveness, inclusion, social cohesion, terrorism, etc.). As a crisis management strategy, educationalisation thus involves that education institutions are allocated greater responsibility for solving major problems while the sources of these problems (e.g. economic models and labour market dynamics) might not be questioned (Tröhler 2016; Valiente et al. 2020).

Liberalisation concerns structural, regulatory and/or ownership transformations towards a market- and competition oriented paradigm. Liberalisation has implications for the relations between the state, the market and civil society (Dunne, 2017) and includes e.g. 1) policies aimed at opening up new markets e.g. in public sectors; 2) policies combining deregulation and regulation to create favourable conditions for competition; 3) structural reorganisation (typically, vertical separation); 4) privatisation, as both sales of public enterprises and contracting out or outsourcing services.

New Public Management (NPM) labels a set of political reforms of public administrations and public sectors carried out by governments from the end of the 1970s in order to introduce market mechanisms in the governance of public services. In the education sector, this is evident in increased marketisation, the promotion of school-based management and a managerialist approach to the governance of education institutions, outcomes-based incentives, performance related pay, education services further oriented toward families' demands, and standardised teacher evaluation or accountability systems (Gunter et al, 2016).



Privatisation can be broadly defined as a process through which there is an increase in private sector participation in economic activities that used to be the remit of the state (Verger, 2020). The broad spectrum of policies and practices associated with privatisation can range from the sales of public enterprises, a shift to private provision through contracting out with public funding and regulatory reform and market-opening (Dunne, 2017). In this latter form, it can be intended as the development of quasi-markets through institutional and policy structures that privilege parental choice, school autonomy, competition between schools and *venture philanthropy*, often with the state regulating for public accountability (Hogan and Thompson, 2017).

- **Endogenous privatisation** or privatisation *in* education involves the importing of ideas, techniques and practises from the private sector in order to make the public sector more like business and more business-like. This includes for example school choice policies, budget devolution, competition between schools, publication of league tables of school results, new managerialism, contract and competitive funding, performance management (Ball and Youdell, 2008).
- **Exogenous privatisation** or privatisation *of* education involves the opening up of public education for private sector participation (whether on a for-profit basis or not), and using the private sector to design, manage or deliver aspects of public education. (Ball and Youdell, 2008; Ball, 2007).
- **Policy privatisation** concerns the involvement of private enterprises or philanthropies in policy design, development and implementation. It develops through flows of actors, tools and ideas between the state, education services and the private sector and involves activities of cognition, calculation, experimentation and evaluation that influence policy thinking about education (Grimaldi and Serpieri, 2013).

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Philanthropy involves the flow of subsidies to education from the private sector, benefactors, NGOs, and philanthropists, social entrepreneurs and parents through donations and payments for charity purposes. In some circumstances, private donors might directly influence education policy, attach conditions to the donations or expect 'returns' on their donations (Ball and Youdell, 2008).

Public-Private Partnerships (PPP): PPP is a generic term used to describe partnerships through which the private sector participates in the provision and/or operation of public education. Such arrangements may include for example (Education International, 2009):

- **Infrastructure PPPs** - where a private operator is granted a franchise (concession) to finance, build and operate an educational facility such as a public school, university building or hostel, training centres, digital infrastructure, and so on.
- **Private operation of public institutions** - where a private firm or organisation (including faith based) operate schools and other education institutions under a contract to a public agency. They remain publicly funded (and owned) but are privately managed.
- **Outsourcing of education services** - Governments contract with the private sector for the provision of education-related services to schools, universities and other education institutions such as: curriculum development and/or delivery; assessment or administration of examinations; school evaluation, review and/or school improvement programmes, digital infrastructure and ICT tools for teaching and learning, initial and continuous professional development programmes for teachers, and so on.
- **Innovation and research PPPs** - Government programmes encourage business-university, or industry-research, partnership to promote the adherence of public research outcomes to market/commercial needs.



Country-specific recommendations are published by the European Commission every spring in the context of the European Semester. They provide tailored advice to individual Member States on how to boost jobs, growth and investment, while maintaining sound public finances. The recommendations adapt priorities identified at EU level and they give guidance on what can be achieved by Member States in the next 12-18 months.

EU multi-level governance refers to a single yet complex governance system, of which national systems of education and industrial relations form part. In EU multi-level governance, decision-making competencies are shared by actors at different levels, and European, national and local political arenas are interconnected rather than nested in each other, with actors and networks operating and connecting at different levels (Hooghe and Marks, 2001).

European Semester. Introduced in 2010, the European Semester is an annual cycle of economic, budgetary, and social policy coordination. The main outcomes of the Semester are country-specific recommendations issued by the Council of the EU to each Member State. Education, training and labour market policies are considered as part of the European Semester. The recommendations are provided in the context of the Stability and Growth Pact and the Macroeconomic Imbalances Procedure. The European Semester also addresses challenges facing the EU with reference to the twin goals of digital and climate transition structured around four dimensions: environmental sustainability, productivity, fairness, macroeconomic stability.

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Industrial democracy refers to all the participation rights of employers and employees in the governance of employment relationships, either directly or indirectly, via trade unions, works councils, shop stewards or other forms of employee representation at any level. It is understood both as an end in itself and as a means to achieve other valuable ends. It is defined (Eurofound 2018) by four sub-dimensions:

- **Autonomy** of social partners in collective bargaining;
- **Representation** rights at both macro (collective bargaining, social dialogue) and company level (works councils, etc.);
- **Participation**, understood as mechanisms for involving employees in management decision-making at company level;
- **Influence**, linked to bargaining power and the relative ability of either side of industry to exert influence over the other side in the context of collective bargaining or management decision-making.

Industrial relations: the term refers to the set of rules governing employment and relations at the workplace, together with the ways in which the rules are made, changed, interpreted and implemented by trade unions, employers and the state. It concerns the collective - rather than individual - aspects of the employment relationship between workers, employers and their respective representatives. This includes the tripartite dimension where public authorities (at different levels) are involved (European Commission 2019).

Social dialogue: all types of negotiation, consultation or simply exchange of information between, or among, representatives of governments, employers and workers on issues of common interest relating to economic and social policy (European Commission, 2017).

- **Negotiations** - usually leads to a formally agreed outcome (e. g. collective agreement).
- **Consultation** - organisations, such as education trade unions, are invited to submit views. The dominant body (e. g. government) may or may not accept/consider views submitted.
- **Communication** - various parties share information.

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