



EUROPEAN TRADE UNION COMMITTEE FOR EDUCATION
COMITE SYNDICAL EUROPEEN DE L'EDUCATION

REPORT

ETUCE Council and Conference, Amsterdam, 14-15 June 2004

Education and the Lisbon Process
Developing policies on the use of indicators and benchmarks



Education and Culture

Socrates

*This project has been carried out with the support of
the European Community in the framework of the Socrates programme*

The information expressed in this publication reflects the views only of the author,
the Commission cannot be held responsible for any use which may be made of the information

Index

1. Introduction	<i>p.3</i>
2. General Report	<i>p. 4</i>
2.1 The educational context	<i>p. 4</i>
2.2 The use of indicators and benchmarks	<i>p. 5</i>
2.3 ETUCE representation in the European Commission's working groups	<i>p. 8</i>
2.4 A common European Union education policy?	<i>p. 8</i>
3. Reports from Group Discussions	<i>p. 10</i>
3.1 Working Group 1	<i>p. 10</i>
3.2 Working Group 2	<i>p. 11</i>
3.3 Working Group 3	<i>p. 12</i>
3.4 Working Group 4	<i>p.14</i>
4. Summary: Recommendations for ETUCE policy	<i>p. 17</i>
5. Programme	<i>p. 20</i>
6. Participants List	<i>p. 22</i>
Annex 1: The Lisbon Process	<i>p. 27</i>
Annex 2: Final list of indicators – July 2003	<i>p. 34</i>

1. Introduction

For some years now, the European Union has been occupied with developing indicators and benchmarks in education. The *European report on quality of school education* presented by the European Commission in 2000 marked the first result of previous years' initiatives, proposing 16 indicators on four areas: attainment levels; educational success and transition; monitoring of school education; educational resources and structures.

ETUCE has followed this work from the beginning in the context of development of policy on quality in education. In the response issued by ETUCE to the *European report on quality of school education* and again in the ETUCE Round Table in Berlin in March 2001 "A challenge to Education in the New Economy – indicators, new skills and lifelong learning in Europe", one of the main points raised was the need to develop indicators which more adequately reflect the complexity of the reality of schools.

The ETUCE Council and Conference in Amsterdam on 14-15 June 2004 further developed the education trade unions' policy on the use of indicators and benchmarks. In the context of the Lisbon Strategy, the EU's cooperation on indicators is expanding and now includes 29 indicators, with new indicators underway.

The conclusions from the ETUCE Council and Conference presented in this report demonstrate that there is still a significant gap between the current use of indicators by governments and the requirements and recommendations of the education trade unions.

In particular, the conclusions call for new and more adequate indicators to be developed in the area of education and training of teachers, both initial and continuing. Another area of high priority is the development of more qualitative indicators, notably indicators aimed at skills and knowledge of crucial importance but which are more difficult to measure, such as citizenship, social cohesion, democracy and creativity. Equally, the conclusions highlight the importance of giving teachers sufficient support and training in working with indicators and of involving teachers directly when making changes in national education policies.

The European Union is arguably on its way to developing a common education policy with common objectives and purposes as identified in the Lisbon and Copenhagen processes, aimed at improving the EU's education and vocational training systems. As confirmed in the discussions on this issue in the Council and Conference, it is important that ETUCE continues to promote the respect and recognition of cultural diversity in the European cooperation on education policy.

The continuous need to strengthen the social dialogue was confirmed. It is the hope of ETUCE that the conclusions drawn in the Council and Conference will contribute to the effective advancement of trade union policy positions at national as well as European Union level.

Martin Rømer
General Secretary



2. General report

2.1 The educational context

In the conclusions of the Lisbon European Council in 2000, education is described as a major tool for achieving a strategic goal at EU level for the first time. The Lisbon Strategy aims to make the EU “*the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion*” by 2010, and EU Ministers of Education were given the mandate to submit a report on the concrete future objectives for education and training systems with a view to contributing to the overall goal. Three strategic objectives and 13 associated objectives were defined in 2001¹ and were followed in 2002 by a Detailed Work Programme² on the implementation of the agreed objectives (see Annex I). In the work programme, the EU Education Ministers also formulated an ambitious goal for the EU education systems: “*the highest quality will be achieved in education and training and Europe will be recognised as a world-wide reference for the quality and relevance of its education and training systems and institutions*”.³

The Lisbon Process is implemented by means of the Open Method of Cooperation, which sets out a new working method for cooperation within the EU based on:

- identifying and defining jointly the common objectives
- agreeing on benchmarks and indicators
- exchange of good practice
- peer review.

In order to assist the implementation of the adopted objectives, the European Commission set up eleven working groups between 2001 and 2003, consisting of national experts from EU/EFTA-countries, applicant countries (Bulgaria, Romania and Turkey), stakeholders and other international organisations. ETUCE is represented in four of the eleven working groups.



The European Commission also established a Standing Group on Indicators and Benchmarks (SGIB) in 2002. Following consultations with each of the working groups, the SGIB issued in July 2003 a final list of 29 indicators⁴ to measure progress towards the agreed objectives (see Annex II).

¹ Report from the Education Council to the European Council: “*The concrete future objectives of education and training systems*”, 12 February 2001.

² “*Detailed work programme on the follow-up of the objectives of education and training systems in Europe*”, adopted by the Council (Education) and the Commission on 14 February 2002.

³ Ibid., p. 9.

⁴ Report from the Standing Group on Indicators and Benchmarks: “*Final list of indicators to support the implementation of the work programme on the future objectives of the education and training systems: Results of the consultation of the working groups*”, July 2003.

All indicators chosen had to be based on data already available and on valid and comparable data (i.e. Eurostat or OECD). Areas in which new indicators need to be developed were also identified and will be further elaborated in a report from the SGIB to be issued on 9 December 2004.

In addition, the EU Education Council adopted in May 2003 five benchmarks in the area of education and training⁵ to be applied for monitoring progress. The benchmarks, or reference levels of European average performance, were also selected according to available and comparable data. These benchmarks and the 29 existing indicators formed the basis for the evaluation of progress made in the Lisbon Strategy in the area of education and training which was included in the joint Council and Commission interim report “*Education and Training 2010: The success of the Lisbon Strategy hinges on urgent reforms*”, submitted to the European Council on 26 March 2004.

2.2 The use of indicators and benchmarks

From the plenary interventions and debates during the two-day Council meeting, a number of points regarding the use of indicators and benchmarks can be identified:



As **Anders Hingel from the European Commission** pointed out, the intention of the EU’s indicators is the identification of good practice in individual countries, not a ranking of member states. In the joint Council and Commission interim report of Spring 2004 mentioned above, the indicators were used to point out a number of warning lights towards areas in which urgent efforts were needed from member states. Such warning lights include: a lack of investment in human resources; rates of early school leavers still too high; too few women in scientific and technological fields; nearly 20% of young people fail to acquire key competences; a shortage of qualified teachers and trainers

is looming; the level of mobility is very low; too few adults participating in lifelong learning.

In a general overview of the benefits as well as the difficulties of using indicators, **Professor Peter Mortimore, former Director of the Education Dpt, University of London**, noted the following:

1. Indicators should be used to provide the best available information. They should always include necessary caveats and health warnings. It should be remembered at all times that the purpose of the indicators is to improve the outcomes for individual students, classes of students, whole schools, systems, or Unions of member states.

⁵ Council Conclusions: “*Reference Levels of European Average Performance in Education and Training (Benchmarks)*”, 5 May 2003.

2. Indicators can help the classroom teachers in providing comparative data for evaluations of progress: How much has my student progressed? Is this more or less than 'average' for the student's age? Are there clear gender differences? Are ethnic minorities achieving equity? Are the disadvantaged achieving a fair deal? A golden rule is that those closest to the site of evaluation gain the most information.
3. Indicators can help the improvement process for classes, schools or systems by: a) auditing the current situation with "yardsticks"; b) setting intelligent "benchmarks"; c) evaluating the before and after "indicators"; d) balancing change and stability.
4. The difficulties associated with indicators include:
 - Easy to judge the quality of some of the components of education
 - School premises and equipment
 - Teachers' qualifications
 - Students' final examination results
 - Hard to judge:
 - Quality of experience of an individual or group
 - Contribution made to progress by school, municipality or system
 - A surrogate for quality is effectiveness.
5. The use of indicators becomes particularly problematic if the stakes involved are too high, i.e. if policy is based too easily on the use made of indicators. This leads to cheating with results. Another disastrous policy practice that can result from the use of indicators is the public naming and shaming of schools.
6. As the way forward for judging the effectiveness of schools, Professor Mortimore pinpointed self appraisal and self review with indicators. Self appraisal implies that the most knowledgeable judges and those with the most to gain or lose are involved. Self review with indicators must include qualitative judgments and should also deal with attitudes and other affective areas.
7. Professor Mortimore moreover made the point that one of the positive aspects of the EU's work on indicators was the fact that, in this case, indicators are created



by other organisations than national governments. This is essential for ensuring that the selected indicators exceed local interest.

In the panel debates,⁶ the main points of view put forward were:

There are three aspects to consider for ETUCE: How to make the best possible use of existing indicators; awareness of abuse of indicators, and developing new indicators.

ETUCE should focus on indicators that support member organisations in their work. Thus, priority should be given to those indicators that can help the classroom teachers. The use of indicators should be carried out in a bottom-up manner. Teachers should be given direct access to information on indicators and trade unions should supervise the use of indicators in the classroom and provide direct support to the teachers. It should never be forgotten that indicators are a tool, not an aim.

Trade unions should be alert to the instances where indicators can provide political power for trade unions in improving education. For example, indicators that show that 1,000,000 new teachers are needed⁷ are very useful for trade unions.

To make the best possible use of indicators, it is important to teach teachers how to work with them.

The use of indicators should be combined with peer reviews and the exchange of good practice. It is when the good practices identified by indicators can be transferred to a different cultural context that benefits from international cooperation on indicators are drawn.

There are many examples in the past of indicators being used by governments to introduce expenditure cuts in education. Trade unions should work for the use of indicators to lead to increased resources to improve results, not to expenditure cuts. But it must be remembered that indicators always involve political stakes, or, in other words, the indicators are political, while the stakes are educational.

The indicators selected by the Standing Group on Indicators and Benchmarks (SGIB) to measure progress towards objective 1.1: *Improving education and training for teachers and trainers*, were identified as seriously inadequate, due to their purely quantitative nature (age distribution of teachers, number of young people, and ratio of pupils to teaching staff). ETUCE should take the opportunity to create new indicators in this area.

⁶ John Bangs (NUT), Radovan Langer (CMOS-PS), Marjatta Melto (OAJ), and Rudy Van Renterghem (COC).

⁷ See Commission Staff Working Paper: “*Progress towards the common objectives in education and training: Indicators and benchmarks*”, 21 January 2004, p. 5.

The majority of the indicators developed by the SGIB are of a quantitative nature. We should seek to establish more qualitative, more advanced indicators. Of course, the problem with the more advanced indicators is that they cost more.

2.3 ETUCE representation in the European Commission's working groups

The four ETUCE representatives in the European Commission's working groups⁸ within the follow-up of the Lisbon Strategy gave a presentation of the groups' work and the role of the social partners in the groups. In general, the working groups were described as a good forum for influence for the social partners. The representation in the groups provides an insight into the implementation process and gives transparency to the process, even though the Commission and the national governments' representatives remain the main actors in the groups. One of the disappointing aspects mentioned was the fact that very few recommendations and comments from the working groups were included in the joint Council and Commission interim report on progress in the Lisbon Strategy within education and training, adopted in Spring 2004.

On the cooperation with the Standing Group on Indicators and Benchmarks in selecting the list of indicators, the general message was that the working groups would have liked to see more qualitative and innovative indicators than were included in the final list. The group on Basic Skills is interested in developing new indicators on learning-to-learn skills and on cultural awareness. Indicators on the quality of teacher education and on an area such as the percentage of teachers who receive in-service training, on which no current data is available, are priority areas for the working group on Teacher Education.

2.4 A common European Union education policy?

In the wake of the follow-up of the Lisbon Strategy, one question is becoming more and more pressing: Are we on the way to a common European Union education policy? This question was addressed at the Council meeting in the intervention by **Ulf Fredriksson**, Mid Sweden University, who divided it into three questions: How can a European education policy be created within the existing framework of the European Union? What could be the content of such an education policy? What could be the policy of ETUCE?

While the use of the Open Method of Coordination and different "processes" (Lisbon, Copenhagen) were highlighted as a way to create a common policy in accordance with the EU's competencies in the area of education, three elements were



⁸ Jean-Louis Biot (UNSA-Edu), Birgitte Birkvad (DLI), Ulf Fredriksson (Mid Sweden University), and Christoph Heise (GEW).

identified as the central content in the EU education policy: a) recognition of qualifications and diplomas at all levels; b) improving the quality of education; c) expanding the concept of education to the broader context of lifelong learning.

The crucial issues for ETUCE policy are accordingly:

- The future distribution of responsibilities between the EU and individual countries? Where would ETUCE like to see this education policy be developed?
- The EU's education policy explicitly aims at a *convergence* of national policies in order to attain common objectives, while *harmonisation* is forbidden according to the Treaty. However, the two terms are open to interpretation and at times difficult to tell apart.
- The methods used to develop the EU education policy. Do we have other working methods than those already in use?
- What would ETUCE like to be the content of this education policy?

In the panel debate which took place on the second day of the meeting, some critical viewpoints were expressed on this issue:

1. The question of what kind of education system we want will always be dependent on local circumstances, so the question should not be answered generally.
2. Instead of implementing one model, the emphasis should be placed on supporting diversity. This question is also related to strengthening social cohesion. The education systems should bring together students from different backgrounds, promote tolerance and face difference, which in turn will benefit social cohesion.

The Council Meeting moreover included an informative speech by the **Dutch Minister of Education, Maria van der Hoeven**, on the priorities of the Dutch EU Presidency in the area of education in the latter half of 2004. During this period, special attention will be devoted to promoting mobility, transparency and language learning in the "European Area of Education" as well as to the question of the role of education in strengthening social cohesion and active citizenship. Minister Van der Hoeven underlined that the goals and priorities of the Lisbon Strategy are a guiding line for the Presidency's work in this area, and gave her view of the merits of the Open Method of Coordination. In particular, the Minister highlighted the method as a valuable instrument for identifying individual 'good practices' through which EU member states can learn from each other. In this context, the Minister also spoke of her experiences with translating the five EU benchmarks in the area of education into national priorities in the Netherlands during her time as Minister of Education.



3. Reports from group discussions

The Council and Conference provided for in-depth discussions in two working group sessions during the second day of the meeting. Working groups were asked to base their discussion on the following questions regarding the use of indicators and benchmarks in education: Our interest as teachers? Our interest as trade unions? How are education policies shaping indicators and vice versa? What are the challenges for ETUCE and how to respond?

The recommendations for ETUCE policy on indicators and benchmarks formulated by the working groups are as follows:

3.1 Working Group 1

Chair: Birgitte Birkvad
Rapporteur: Ronnie Smith

Firstly, the group wished to draw attention to four main points:

1) Early childhood education

The European Commission's expert groups' work on developing indicators and benchmarks concentrates too much on schools and pays too little attention to the significance of early childhood (nursery) education. Also, there is a focus on outputs and a tendency to play down the importance of inputs, though funding and investment have a big impact on the outcomes. A better balance of indicators is needed.

2) Publication of data

The group expressed strong concerns about the increasingly widespread practice of publishing data about individual schools. In small schools this could result in the identification of individual pupils. Usually, only limited areas of information are published – data that is easily measurable and capable of being used to compare schools. This gives an incomplete picture of the school, but forms the basis upon which important judgements are made. Furthermore, teachers feel they are held personally responsible for the outcomes (e.g. performance in literacy tests). Indicators may then have a negative effect as they become the driver, a determinant of teachers' work, instead of being a tool to measure progress.



3) Soft indicators

A narrow focus should be avoided. In measuring pupils' key competencies for example, emphasis should also be given to *soft* skills such as democracy, peace, citizenship.

4) Entrepreneurship

In discussing the work of the Commission Expert Group B (basic skills), two different perceptions of the term “entrepreneurship” arose. Some objected to the concept as inappropriate, being too business-focused and strengthening the individual at the expense of the collective, with schools being run as enterprises. Other group members interpreted the term in a positive way, stressing that the term should be understood as signifying more broadly based skills, such as innovation and team working.

In conclusion, the group pointed out the following priority areas for ETUCE policy:

- The importance of investment in education should be emphasised at all levels.
- Priority should be given to the continuous professional development and training of teachers. In this respect, the training and qualification of school leaders are also important.
- Indicators should take account of the conditions of the school environment (e.g. class size).
- There is a growing concern about publication of data on individual schools, notably of how this easily distorts the picture of the school as, in most cases, it fails to take account of the broader context.

3.2 Working Group 2:

Chair: Christoph Heise

Rapporteur: Olwyn Gunn

1) Situation of the teacher

The group highlighted the importance of involving teachers when making changes in national education policies. Whilst there must be accountability in the education system, this must be aligned with professionalism and autonomy for teachers.

The group posed some questions. Could indicators be a waste of resources? Are indicators healthy? Have indicators become a political tool? Should teaching hours be an indicator? The group expressed concern about the impact upon indicators of working conditions, GDP and level of resources.

2) Soft and hard indicators

A balance between the use of soft and hard indicators should be achieved. A wide range of important values and skills fostered by school education is extremely difficult to measure (e.g. citizenship, democracy, creativity, etc.) and in any case they are not grasped by hard indicators. Soft indicators should be developed.

Indicators should not be used to make judgments about teachers. Indicators are a tool, not an objective. In some cases, indicators aimed at measuring student progress are interpreted as reflecting the quality of teaching. Frequently, indicators are used as a political tool instead of a tool to improve the quality of teaching and learning.

It must be recognised and accepted that cultural differences have an impact upon indicators.

The social background of the pupils plays an important part and should be taken into account and reflected in the indicators. Information on the social background of the pupils should be based on dialogue with the teacher.

3) Cultural diversity, citizenship and social cohesion

For future ETUCE work, the group wishes to give priority to work on indicators in the fields of citizenship and social cohesion. ETUCE should look beyond the EU agenda's focus on economic growth and maintain the focus on better quality education for pupils.

Furthermore, ETUCE should work actively to foster respect and recognition of cultural diversity. The potential for exchange of best practice among ETUCE members should be further developed.

3.3 Working Group 3

Chair: Ulf Frederiksson

Rapporteur: Pat Lerew

1) Teacher Education

Firstly, the group discussed the impact of the Bologna Process on teacher education. In particular, the group expressed strong concerns about the consequences on the level of teacher education if teacher education is to be fitted into a three plus one/two structure, as implied by the Bologna Process's two-cycle system. At the end of each phase, students should be able to enter the labour market. Among the participants of the group, 15 members representing 10 different countries, there was a clear consensus that teacher education has not paid sufficient attention to this problem, in contrast to other sectors such as engineering or medical studies. It was clear to the participants that training cannot adequately be undertaken if reduced to one cycle of three years. The combination of

theoretical and practical training that is crucial to teacher education requires a minimum of four years study.⁹ Trade Unions will need to stand firm on this point.

The group recommended that the ETUCE Higher Education Standing Committee should be involved in responding to this in the work on the Bologna Process.

In Italy, different qualifications are required for pre-primary, primary and secondary teachers, making it difficult for teachers to change between levels during their career.

2) *Professional development*

The situations of lifelong learning and professional development for teachers were discussed with reference to country differences. The access to continuous professional development varies greatly between countries, but, overall, there are insufficient government funds in this area. ETUCE should be more proactive on this issue.

The group recommended that:

- The amount of professional development must be monitored;
- The number of qualified teachers needs to be identified. EU governments lack this data; ETUCE should be a forum for the harmonisation of collecting national figures on this issue.

3) *Classroom indicators*

Regarding indicators related specifically to classroom teaching, the group recommended that different types of testing in schools should be monitored. Moreover, ETUCE should look beyond the Lisbon Strategy's economic focus, and seek to develop indicators aimed at such complex aspects of learning as emotional intelligence and critical thinking. Class size should be an indicator and the quality of teaching in teacher education should be a priority area for developing new indicators.



⁹ This statement did not imply the position of the teacher training colleges training for example for pre-school teachers and/or primary school teachers, but refers to the so-called 'academic-route'.

4) *External/internal evaluation*

Finally, the group discussed the relationship between external and internal evaluation of schools. In the majority of countries, there was a strong need to achieve a better balance between the two.

3.4 Working Group 4

Chair: Jean-Louis Biot

Rapporteur: Georges Pasquier

1) *The influence of indicators on education policies*

With a view to discussing the overall question of how indicators have shaped education policies and vice versa, the group took the area of ICT in education as a starting point.

In this area, the use of indicators has most often led to furnishing schools with ICT equipment, but this has, in general, not been accompanied by the proper training of teachers in the use of ICT. This is the case in Belgium, for example. In Portugal, ICT has mainly been introduced in secondary schools. While the political impetus to develop the use of ICT in education exists, the economic recession hinders a more rapid advancement. In Hungary, a project named “Schuli-net” was launched in the 1980s; consequently all upper secondary schools and 80% of primary and lower secondary schools are now connected to the Internet but, apart from those educated specifically to teach information technology, teachers still need adequate training in this area.



In general, the reports given from members of the group revealed that indicators influence national education policies in a very partial manner. In Hungary, for example, there is a problem of indicators being manipulated to further the interest of the government; even quantitative indicators such as GNP have been abused in this way. In Belgium, PISA results have in some cases influenced political decisions, but in the specific case in which PISA results demonstrated the inequality inherent in the Belgian education system, no conclusion was drawn to change education policies.

2) *Consultation with trade unions*

The group came to a worrying conclusion: In all of the countries represented by members of the group, trade unions had not been consulted by their governments on national education policies on ICT.

In Bulgaria, for example, the Ministry of Education and the World Bank have signed a contract for providing schools with ICT-equipment without involving the trade unions, who did not become acquainted with the agreement until a year after it was signed. This agreement, moreover, only covered insufficient equipment for schools and no training for teachers in ICT was provided, even though this aspect had been planned.

3) *Recommendations for ETUCE policy*

The group recommended that a European Research Centre on ICT in education be established which could inform everyone on this issue. Considering the major influence ICT exerts on the organisation of our society, what influence is it not having on our education systems? The development of the use of ICT in education is moving forward very rapidly and trade unions will need to be very proactive on the question of the use and harmonisation of indicators on ICT.

Among the many perceptions and ideas on ICT in education circulating in society and which a European Research Centre should address, the group mentioned:

- The use of computers and the internet can enhance reading literacy (PISA), openness to the world, knowledge, etc. But this seems to be true only for those coming from an environment already open to the world; in other cases, the use of ICT seems to be limiting young people in developing their skills.
- How to teach pupils to be selective in using information available on the internet?
- Paediatricians and psychologists have drawn attention to the possible impact of computers on the development of the child's personality, e.g. fatigue, isolation.
- Will ICT replace the teacher? Many fears exist on the use of ICT for distance learning.

Should trade unions propose counter-indicators or new indicators?

Indicators should be accepted to the extent that trade unions can control the use made of them by governments.

Indicators are widely used to further economic interests; now it is necessary to ensure that the teaching profession has the means to make use of indicators for pursuing its own goals. It is not enough for trade unions to have access to indicators; they must be able to draw maximum benefit from them. The use of existing indicators and the development of new indicators must serve the goals of the school and of the teaching profession. Thus, indicators which support the education system internally and which reflect teachers' working conditions should be given priority. In other words, ETUCE should give priority to work on qualitative indicators.

Indicators must be continuously updated. Trade unions should be alert to the use of indicators by governments for justifying unjust political choices. If one says, for example, "one teacher for every twelve pupils", the actual situation is hidden.

How to work towards a European unification of the goals of the education system without jeopardising the cultural diversity of our education systems?

Why not set minimum standards for the material conditions in our schools? The EU sets minimum standards for cattle breeding, but no such standards for our schools!

4. Summary

Recommendations for ETUCE policy

Developing new indicators

1. The existing indicators on education and training of teachers are all of a quantitative nature and utterly inadequate. ETUCE should take the opportunity to develop new indicators in this field. Specific areas in which indicators should be created include:
 - the amount of professional development for teachers
 - the number of qualified teachers
 - the quality of teaching in teacher education
 - the training and qualification of school leaders

ETUCE should in this connection be a forum for the harmonisation of collecting national figures on the number of qualified teachers.

2. ETUCE should work for more qualitative indicators to be developed. The majority of the EU's existing indicators are quantitative, but a wide range of important values and competences fostered by school education cannot be measured by hard, quantitative indicators. Priority should be given to work on developing qualitative indicators in the fields of citizenship, social cohesion, democracy and creativity, as well as indicators aimed at measuring complex aspects of learning such as emotional intelligence and critical thinking.
3. Indicators should moreover reflect the conditions of school environment (e.g. class size) and teachers' working conditions and should take account of the social background of the pupils. In the latter case, information used should be based on dialogue with the teacher.

Supporting teachers and the education system

4. It should be recognised at all levels that the purpose of indicators is to improve educational results. Indicators are a tool, not an objective. The use of indicators should support education systems internally and lead to increased resources to improve educational outcomes.
5. A bottom-up approach should be taken. Teachers must be given direct access to information on indicators and be trained in how to work with them. Trade unions should supervise the use of indicators in the classroom and provide direct support to teachers. In this respect, the importance of involving teachers when making changes in education policies should also be reiterated.
6. Trade unions should, where possible, draw maximum benefit from existing indicators in providing political power to pursue the goals of the union policies.

7. To derive full benefit from international cooperation, the use of indicators should be combined with peer reviews and exchange of good practice. In this connection, the potential for exchange of good practice among ETUCE members should be further developed.

Awareness of abuse of indicators

8. Trade unions should be very alert to instances where indicators are manipulated or interpreted in a partial manner by governments to further its own interests, to the detriment of the education system. Many examples exist of indicators being used by governments to justify expenditure cuts in education.
9. ETUCE and its members must be strongly concerned with the increasingly widespread practice of the use of indicators leading to publishing data about individual schools. Usually only limited areas of information are published (e.g. comparable data), which easily distort the real picture of the school as they fail to take account of the broader context.
10. Other unsound uses of indicators to which ETUCE and its members must be alert include the use of indicators aimed at measuring student progress being interpreted as reflecting the quality of teaching as well as indicators leading to an increasing trend of testing.

A more balanced Lisbon Strategy

11. Early childhood education should be given greater emphasis in the EU's development of indicators and benchmarks. As ETUCE has stressed previously, early childhood education plays a crucial role in giving equal access to lifelong learning and equal opportunities later in life.
12. In the context of the EU's Lisbon Strategy specifically and in the light of the demands and challenges of the knowledge society more broadly perceived, the international acceptance of the importance of education is increasing. However, ETUCE should at all times look beyond the economic focus of the Lisbon Strategy and maintain the focus on quality education for all.
13. The EU's work in the field of education is taking on an increasingly prominent role, to the extent that the contours of a common European Union education policy are beginning to take shape. ETUCE should continue to work actively to promote respect and recognition of cultural diversity in the European cooperation on education politics.
14. The importance of investment in education should be emphasised at all levels.
15. A better balance between input and output indicators is needed.

16. A better balance between internal and external school evaluation should be achieved.

Other policy proposals

17. ETUCE must urgently consider the impact of the Bologna Process on teacher education. The quality of teacher education is seriously at risk if it is to be fitted into the Bologna Process' two-cycle system of three plus two year courses in which students are to be able to enter the labour market after the end of each course. The combination of theoretical and practical units that is essential to teacher education requires a minimum of four years study.

18. It was furthermore suggested that ETUCE should consider developing a proposal to the European Commission for the establishment of a European Research Centre on ICT in education.

ETUCE Council and Conference

Amsterdam, 14-15 June 2004

Programme

EDUCATION AND THE LISBON PROCESS

Developing policies on the use of Indicators and Benchmarks

Monday, 14 June

- 10.00h – 11.00h: **Registration**
- 11.00h – 11.15h: **Opening of the ETUCE Council / Conference**
by the President of ETUCE, Doug McAvoy
- 11.15h – 12.00h: **Education and the Lisbon Process**
Focus: The use of Indicators and Benchmarks in the development of common education policies
by Mr. Anders Hingel, DG Education & Culture, European Commission- responsible for the Expert Group on Indicators.
- 12.00h – 12.30h: **Questions and debate**
- 12.30 h – 14.00h: Lunch**
- 14.00h – 14.30h: **Relations to the Bruges / Copenhagen Process**
- 14.30h – 15.30h: **Debate on the work in the European Commission's Expert Groups**
Plenary:
Contributions by the ETUCE representatives in the Commission's Expert Groups.
- 15.30h – 16.00h: Coffee break**
- 16.00h – 16.30h: **On the way to a Common European Union Policy?**
*By Ulf Fredriksson, Senior Lecturer, PhD
Department of Education, Mid Sweden University*

16.30h – 17.00h: **Debate in plenary**

19.00h *Dinner*

Tuesday, 15 June

9.00h – 9.45h: **Indicators and the Classroom Teacher**
by Professor Peter Mortimore, former Director of the Education Dpt, University of London

9.45h – 10.15h: **Questions and Debate**

10.15h- 11.30h **The Challenge from Lisbon: Using Benchmarks and Indicators**
Working groups including *Coffee Break*

11.30h – 12.00h: **Education Priorities of the Incoming Dutch Presidency**
by Mrs Maria van der Hoeven, Dutch Minister of Education

12.00h – 13.30h: Lunch

13.30h – 14.00h: **Developing Policies on the Use of Indicators and Benchmarks in Education**
Panel Debate: Representatives from 5 member organisations

14.00h – 15.00h: **Future ETUCE Policy on the use of Indicators and Benchmarks**
Group discussions

15.00h – 15.30h: **Group Reporting and conclusions**
Plenary

15.30h: **Closing of Council and Conference**

Participants list

Country	Organisation	Last Name	First name
Belgium	ACOD	Deckers	Hugo
Belgium	COC	Van Renterghem	Rudy
Belgium	ACOD	Vansweevelt	George
Belgium	UCEO-CSEns	Desmedt	Michel
Belgium	CSC (fic)	Bastien	Michel
Bulgaria	SEB	Damianova	Kounka
Bulgaria	Podkrepa	Kroumov	Kroum
Cyprus	POED	Kasoulides	Andreas
Cyprus	POED	Peyiotis	Ioannis
Cyprus	POED	Kouratou	Alexandros
Cyprus	OLTEK	Mattheou	Niki Stavrou
Cyprus	OELMEK	Iosef	Andreas
Cyprus	OELMEK	Theophilou	Stelios
Cyprus	KTOEOS	Selchuk	Samiye
Czech Rep.	CMOS-PS	Langer	Radovan
Denmark	BUPL	Lund	Stig
Denmark	NLS	Darinder	Lillemor
Denmark	DLF	Andersen	Stig
Denmark	GL	Madsen	Peter
Denmark	GL	Laugesen	Hans
Estonia	EEMU	Parkel	Vaike

Finland	FUURT	Matilainen	Riku
Finland	FUURT	Rönnholm	Ragna
Finland	OAJ	Rusk	Anders
Finland	OAJ	Melto	Marjatta
France	SNEP-FSU	Camel	Frédéric
France	FEP-CFDT	Fondard	Marie-Agnès
France	UNSA-Edu	Biot	Jean-Louis
France	UNSA-Edu	Gonthier	Patrick
France	SNES	Ferrari	Roger
France	SNES	Jean	Gisèle
France	SNES	Cordelier	Odile
France	SNETAA	Pabot	Bernard
France	SNETAA	Lang	Catherine
Germany	VBE	Eckinger	Ludwig
Germany	VBE	Zimmermann	Michael
Germany	GEW	Buch	Volker
Germany	GEW	Stange	Eva Maria
Germany	GEW	Heise	Christoph
Germany	BLBS	Rosenau	Renate
Greece	OLME	Giakoumakis	Kostas
Greece	OLME	Kalomoiris	Grigoris
Greece	OIELE	Haralambos	Stertsos
Greece	OIELE	Kostoula	Dafni
Greece	DOE	Babouras	Polyzois
Greece	DOE	Beladakis	Manolis

Hungary	SEH-PSZ	Vajna	Tünde
Hungary	SEH-PSZ	Varga	Laszlo
Ireland	INTO	Long	Seamus
Ireland	INTO	Corcoran	Austin
Italy	CGIL	Giorgetti	Gabriella
Latvia	LIZDA	Trapenciere	Ilze
Lithuania	LEETU	Babrauskiene	Tatiana
Netherlands	AOB	Van Nie	Auke
Netherlands	AOB	Dresscher	Walter
Netherlands	AOB	Dumont	André
Netherlands	AOB	Kerperien	Trudy
Netherlands	AOB	Stemerding	Gerrit
Netherlands	AOB	Verlinden	Claire
Netherlands	OCNV	De Jong	Evert
Netherlands	OCNV	Huisman	Francis
Norway	NARW	LEM	Sigrid
Norway	Utdanningsforb.	Holst	Haldis
Norway	Utdanningsforb.	Østereng	Berit
Norway	Utdanningsforb.	Skulberg	Harald
Poland	NSS Solidarn.	Misterkiewicz	Boguslaw
Portugal	SINDEP	Chagas	Carlos
Portugal	FNE	Bragança	Arminda
Portugal	FENPROF	Gaspar	Ana
Slovakia	OZPSaV	Pavlovicova	Katarina
Slovakia	OZPSaV	Gasperan	Jan

Slovenia	ESTUS	Modrijan	Sandi
Spain	STEs	López Cirugeda	Justo
Spain	FETE-UGT	Caño	Isabel
Spain	FETE-UGT	López Cortiñas	Carlos
Sweden	LR	Hallenberg	Lars
Sweden	LR	Astrom	Sonja
Sweden	Lärarförbundet	Norrstad	Mats
Sweden	Lärarförbundet	Lindholm	Jörgen
Switzerland	SER	Schöb	Suzanne
Switzerland	SER	Pasquier	Georges
UK	SSTA	Eaglesham	David
UK	SSTA	McKenzie	Alan
UK	NASUWT	Lerew	Pat
UK	NASUWT	Gunn	Olwyn
UK	ATL	ROWLEY	Judith
UK	ATL	Imison	Gerald
UK	NUT	Jarman	Arthur
UK	NUT	Fawcett	Barry
UK	NUT	Bangs	John
UK	NUT	McAvoy	Doug
UK	EIS	Wardhaugh	Sheena
UK	EIS	Smith	Ronnie

Guests:

Fredriksson	Ulf
Hingel	Anders
Lennon	Charlie
Mortimore	Peter
Mouchoux	Alain

ETUCE:

Birkvad	Birgitte
Falktoft	Annemarie
Jenaro	Elena
Rømer	Martin
Verschueren	Danielle



Annex I

ETUCE Council/Conference
Amsterdam 14-15 June 2004

The Lisbon Process Education & Training 2010

In 2000, the Lisbon European Council set a strategic target for the European Union for 2010: *“to become the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion”*. The Education Council was asked within this context to undertake *“a general reflection on the concrete objectives of education systems, focusing on common concerns while respecting national diversity”*.

In 2001, the Education Council adopted three strategic objectives for the education and training systems to be achieved by 2010:¹⁰

- **Increasing the quality and effectiveness of education and training systems in the European Union**
- **Facilitating the access of all to the education and training systems**
- **Opening up education and training systems to the wider world**

In addition, thirteen concrete associated objectives were identified to support the three main objectives:

Objective 1: Increasing the quality and effectiveness of education and training systems in the European Union

- 1.1 Improving education and training for teachers and trainers
- 1.2 Developing skills for the knowledge society
- 1.3 Ensuring access to ICT for everyone
- 1.4 Increasing the recruitment to scientific and technical studies

¹⁰ Report from the Education Council to the European Council: "The concrete future objectives of education and training systems", 12 February 2001.

1.5 Making the best use of resources

Objective 2: Facilitating the access of all to the education and training systems

2.1 Open learning environment

2.2 Making learning more attractive

2.3 Supporting active citizenship, equal opportunities and social cohesion

Objective 3: Opening up education and training systems to the wider world

3.1 Strengthening the links with working life and research, and society at large

3.2 Developing the spirit of enterprise

3.3 Improving foreign language learning

3.4 Increasing mobility and exchanges

3.5 Strengthening European co-operation

In 2002, EU Ministers of Education and the European Commission endorsed a *Detailed Work Programme*¹¹ for the implementation of the concrete future objectives adopted in 2001. The work programme sets out forty-two key issues that need to be addressed to achieve the three strategic objectives and their thirteen associated objectives, and it identifies the main instruments that will be used for measuring progress.

The Education Council and the Commission furthermore defined the following goals to be achieved by 2010:

- 1) *the highest quality will be achieved in education and training and Europe will be recognised as a world-wide reference for the quality and relevance of its education and training systems and institutions;*
- 2) *education and training systems in Europe will be compatible enough to allow citizens to move between them and take advantage of their diversity;*
- 3) *holders of qualifications, knowledge and skills acquired anywhere in the EU will be able to get them effectively validated throughout the Union for the purpose of career and further learning;*

¹¹ “Detailed work programme on the follow-up of the objectives of education and training systems in Europe”, adopted by the Council (Education) and the Commission on 14 February 2002.

- 4) *Europeans, at all ages, will have access to lifelong learning;*
- 5) *Europe will be open to cooperation for mutual benefits with all other regions and should be the most-favoured destination of students, scholars and researchers from other world regions.*

The forty-two key issues defined in the work programme are as follows, reprinted in relation to the three strategic objectives and their thirteen associated objectives:

Objective 1

Increasing the quality and effectiveness of education and training systems in the European Union

1.1 Improving education and training for teachers and trainers

Key issues:

- 1) Identifying the skills that teachers and trainers should have, given their changing roles in knowledge society
- 2) Providing the conditions which adequately support teachers and trainers as they respond to the challenges of the knowledge society, including through initial and in-service training in the perspective of lifelong learning
- 3) Securing a sufficient level of entry to the teaching profession, across all subjects and levels, as well as providing for the long-term needs of the profession by making teaching and training even more attractive
- 4) Attracting recruits to teaching and training who have professional experience in other fields

1.2 Developing skills for the knowledge society

Key issues:

- 1) Identifying new basic skills, and how these skills together with the traditional basic skills can be better integrated in the curricula, learned and maintained through life
- 2) Making attainment of basic skills genuinely available to everyone, including those less advantaged, those with special needs, school drop-outs and to adult learners
- 3) Promoting official validation of basic skills, in order to facilitate ongoing education and training and employability

1.3 Ensuring access to ICT for everyone

Key issues:

- 1) Providing adequate equipment and educational software so that ICT and e-Learning processes can be best applied in teaching and training practices
- 2) Encouraging the best use of innovative teaching and learning techniques based on ICT

1.4 Increasing the recruitment to scientific and technical studies

Key issues:

- 1) Increasing the interest in mathematics, science and technology from an early age
- 2) Motivating more young people to choose studies and careers in the fields of mathematics, science and technology in particular research careers and scientific disciplines where there are shortages of qualified personnel, in a short and medium term perspective, in particular through the design of strategies for educational and vocational guidance and counselling
- 3) Improving gender balance among people learning mathematics, science and technology
- 4) Securing a sufficient numbers of qualified teachers in mathematics and scientific and technical subjects

1.5 Making the best use of resources

Key issues:

- 1) Increasing investment in human resources while ensuring an equitable and effective distribution of available means in order to facilitate general access to and enhance the quality of education and training
- 2) Supporting the development of compatible quality assurance systems respecting diversity across Europe
- 3) Developing the potential of public-private partnerships

Objective 2

Facilitating the access of all to the education and training systems

2.1 Open learning environment

Key issues:

- 1) Broadening access to lifelong learning by providing information, advice and guidance, on the full range of learning opportunities available
- 2) Delivering education and training so that adults can effectively participate and combine their participation in learning with other responsibilities and activities
- 3) Ensuring that learning is accessible for all, in order to better respond to the challenges of the knowledge society
- 4) Promoting flexible learning paths for all
- 5) Promoting networks of education and training institutions at various levels in the context of lifelong learning

2.2 Making learning more attractive

Key issues:

- 1) Encouraging young people to remain in education or training after the end of compulsory education; and motivating and enabling adults to participate in learning through later life
- 2) Developing ways for the official validation of non-formal learning experiences
- 3) Finding ways of making learning more attractive, both within the formal education and training systems and outside them,
- 4) Fostering a culture of learning for all and raising the awareness of potential learners of the social and economic benefits of learning

2.3 Supporting active citizenship, equal opportunities and social cohesion

Key issues:

- 1) Ensuring that the learning of democratic values and democratic participation by all school partners is effectively promoted in order to prepare people for active citizenship
- 2) Integrating fully equal opportunity considerations in the objectives and functioning of education and training
- 3) Ensuring fair access to acquisition of skills for the less privileged or those currently less well served and motivating them to participate in learning

Objective 3

Opening up education and training systems to the wider world

3.1 Strengthening the links with working life and research, and society at large

Key issues:

- 1) Promoting close co-operation between education and training systems and society at large
- 2) Establishing partnerships between all types of education and training institutions, firms and research facilities for their mutual benefit
- 3) Promoting the role of relevant stakeholders in developing training, including initial training, and learning at the work place

3.2 Developing the spirit of enterprise

Key issues:

- 1) Promoting the sense of initiative and creativity throughout the education and training system in order to develop the spirit of enterprise (“entrepreneurship”)
- 2) Facilitating the acquisition of skills needed to set up and run a business

3.3 Improving foreign language learning

Key issues:

- 1) Encouraging everyone to learn two, or where appropriate, more languages in addition to their mother tongues, and increasing awareness of the importance of foreign language learning at all ages
- 2) Encouraging schools and training institutions in using efficient teaching and training methods and motivating continuation of language learning at a later stage of life

3.4 Increasing mobility and exchanges

Key issues:

- 1) Providing the widest access to mobility to individuals and to education and training organisations, including those serving a less privileged public and reducing the remaining obstacles to mobility

- 2) Monitoring the volume, directions, participation rates as well as qualitative aspects of mobility flows across Europe
- 3) Facilitating validation and recognition of competencies acquired during mobility
- 4) Promoting the presence and recognition of European education and training in the world as well as their attractiveness to students, academics and researchers from other world regions

3.5 Strengthening European co-operation

Key issues:

- 1) Enhancing the effectiveness and timeliness of recognition processes for the purpose of further study, training and employment throughout Europe
- 2) Promoting co-operation between responsible organisations and authorities in view of more compatibility in quality assurance and accreditation
- 3) Promoting transparency of information on education and training opportunities and structures in view of the creation of an open European area for education
- 4) Promotion of the European dimension of teaching and training

Annex II

Final list of indicators as proposed by the Standing Group on Indicators and Benchmarks in July 2003¹²

Objective 1.1

- Age distribution of teachers together with upper and lower retirement age.
- Number of young people in the 0-15 and 16-19 age groups and as percentage of total population.
- Ratio of pupils to teaching staff by education level.

Objective 1.2

- Percentage of those aged 22 who have successfully completed at least upper secondary education (Isced 3).
- Percentage of pupils with reading literacy proficiency “level 1” and lower on the PISA reading literacy scale.
- Distribution and mean performance of students, per country, on the PISA reading literacy scale.
- Distribution and mean performance of students, per country, on the PISA mathematical literacy scale.
- Distribution and mean performance of students, per country, on the PISA science literacy scale.
- Percentage of adults with less than upper secondary education who have participated in any form of education or training, in the last 4 weeks by age group (25-34, 35-54 and 55-64).

Objective 1.4

- Students enrolled in mathematics, science and technology as a proportion of all students in tertiary education (ISCED 5A, 5B and 6).
- Graduates in mathematics, science and technology (ISCED 5A, 5B and 6) as percentage of all graduates (ISCED 5A, 5B and 6).
- Total number of tertiary (ISCED 5A, 5B and 6) graduates from mathematics, science and technology fields.
- Share of tertiary graduates in mathematics, science and technology per 1000 inhabitants aged 20-29 - Broken down by ISCED levels 5A, 5B and 6.

Objective 1.5

- Public expenditure on education as a percentage of GDP
- Private expenditure on educational institutions as a percentage of GDP

¹² Report from the Standing Group on Indicators and Benchmarks (SGIB): “*Final list of indicators to support the implementation of the work programme on the future objectives of the education and training systems: Results of the consultation of the working groups*”, July 2003. The SGIB is an expert group set up by the European Commission in 2002 to give advice on the use of indicators.

- Enterprise expenditure on continuing vocational training courses as a percentage of total labour costs.
- Total expenditure on educational institutions per pupil/student by level of education (PPS)
- Total expenditure on educational institutions per pupil/student by level of education relative to GDP per capita.

Objective 2.1

- Percentage of population aged 25-64 participating in education and training in 4 weeks prior to the survey by level of educational attainment.

Objective 2.2

- Hours in CVT courses per 1000 hours worked (only enterprises with CVT courses), by NACE.
- Hours in CVT courses per 1000 hours worked (all enterprises), by NACE
- Participation rates in education by age and by level of education.
- Share of the population aged 18-24 with only lower secondary education and not in education or training

Objective 3.3

- Distribution of lower/ upper secondary pupils, learning foreign languages.
- Average number of foreign languages learned per pupil in upper secondary education.

Objective 3.4

- Inward and outward mobility of teachers and trainers within the Socrates (Erasmus, Comenius, Lingua and Grundtvig) and Leonardo da Vinci programmes
- Inward and outward mobility of Erasmus students and Leonardo da Vinci trainees
- Foreign students enrolled in tertiary education (ISCED 5 and 6) as a percentage of all students enrolled in the country of destination, by nationality (European country or other countries)
- Percentage of students (ISCED 5-6) of the country of origin enrolled abroad (in a European country or other countries)

The Standing Group on Indicators and Benchmarks has identified the following areas as priority areas for developing new indicators:

- Language competencies
- Efficiency in expenditure on education and training
- Learning to learn skills
- Percentage of teachers and trainers in continuous training
- Social background of tertiary students
- Social cohesion and active citizenship
- Equity
- ICT
- Mobility