Next Steps in Managing Teacher Migration

Papers of the Sixth Commonwealth Research Symposium on Teacher Mobility, Recruitment and Migration

Edited by Jonathan Penson and Akemi Yonemura

Commonwealth Secretariat

United Nations Educational, Scientific and Cultural Organization

International Institute for Capacity Building in Africa

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Dedication

This book is dedicated to Dr Michael Daniel Ambatchew (1967–2012), who contributed the paper 'Teacher attrition in Wolaita: The cases of domestic migration of Bolosso Sore and Damot Gale *woredas*'. He presented this paper at the Sixth Commonwealth Research Symposium on Teacher Mobility, Recruitment and Migration, while working as an adviser to Link Community Development.

Dr Ambatchew earned a Bachelor of Arts degree from Addis Ababa University in Ethiopia in 1987; a Master's in Education from Exeter University in the UK in 1992; and a Doctorate in Literature, specialising in English, from the University of Pretoria in South Africa in 1994. Starting work in 1988 as teacher educator at the Kotebe College of Education in Addis Ababa, he devoted his career to teaching English as a second language, training teachers and writing children's books. He published over 30 articles and chapters in books, and over 40 teaching materials and readers.

Dr Ambatchew passed away on 25 September 2012 in Addis Ababa after receiving treatment in hospitals locally and abroad. He is survived by his wife Ms Fassikawit Ayalew and his two sons, Beruk, aged 12, and Ezra, aged 7.

Foreword

Migration is both a millennia-old phenomenon and a distinctive feature of our times. For centuries, people have migrated in search of better economic opportunities, to find new challenges and to experience and learn from cultures other than their own. People have also migrated throughout history to escape conflict, environmental stress, natural disasters, and social, political and economic hardship. In the modern era, the ease of transport and communications and the changes in expectations brought about by globalisation mean that the potential and opportunities for international mobility are arguably greater than ever, even in a global environment where immigration controls are stronger than they have ever been. People no longer necessarily feel constrained by their horizons, but understand that they have the potential to work wherever they are needed and where they will be rewarded. We are witnessing too shifts in the patterns of conflict and complex emergencies, from the large-scale international militarised wars of the twentieth century to smaller-scale, intra-national conflicts where civilians have become increasingly targets of violence. Climate change is also predicted to increase the number of migrants escaping environmental stress.

Similarly, the movement of ideas and practices related to education is rapidly accelerating. Moving alongside are teachers. This is both an opportunity and a risk, for teachers and for education systems. Teachers may benefit enormously, both in financial terms and in terms of opportunities to develop professionally. But they may be exploited or abused, or face great personal and institutional barriers to the practice of their profession. Education systems may benefit from greater efficiency in the deployment of teachers, and from the greater inter-cultural understanding that results from international migration. But at the same time, large investments in teacher training may be lost when teachers move away.

Well-managed teacher migration can contribute both to increasing access to education for at-risk children (such as refugees and the rural poor) and the quality of education children receive, even in difficult circumstances. It is critically important to provide frameworks that protect teachers and to acknowledge that, formally recognised and properly supported, these same teachers can present an important resource for recipient countries to educate children. Managing migration well – as suggested at a Commonwealth level by the Ramphal Commission on Migration and Development's current series of reports *People on the Move*[1]; at a UN level by a 2008 UNESCO Expert Group Meeting report on *Migration and Education: Quality Assurance and Mutual Recognition of Qualifications*[2]; and at the African Union level by its 2006 *Migration Policy Framework for Africa*[3] and the *Second Decade of Education for Africa (2006–2015)*[4] – is thus a key factor in achieving the Millennium Development Goals for educational access and equity and the Education for All quality objectives, as well as securing migrant teachers' rights and protecting education systems.

The *Commonwealth Teacher Recruitment Protocol* (CTRP), adopted by Commonwealth ministers of education in 2004, is one instrument which helps countries to manage migration. It was a response to the concern voiced by a number of Commonwealth countries, particularly small states, that a significant proportion of their teaching workforce was being lost to targeted recruitment drives to work in other countries. While the mutual benefits to source and destination countries of teacher migration were recognised, it was felt that the migration process needed to be managed in order to maximise these benefits and minimise any negative consequences. The CTRP outlines the rights and responsibilities of recruiting countries, source countries and recruited teachers, as well as action plans to promote this tool as an international standard for organised teacher

recruitment. Since its adoption, the CTRP has been acknowledged by international organisations, such as the UN Educational, Scientific and Cultural Organization (UNESCO), the International Labour Organization (ILO), the Organization of American States (OAS) and Education International, as a document of good practice in education and migration issues within and outside of the Commonwealth.

As one of the action plans of the protocol, since 2006 the Commonwealth Secretariat has convened researchers and policy-makers from government, academia and civil society to address the need for reliable data on, and research about, teachers across all regions of the Commonwealth and beyond. There have now been six teacher research symposia, each one addressing a particular theme. Many of the papers presented at previous symposia concentrated on teachers recruited to work in developed countries. However, South-to-South migration is increasingly important, as are teachers who are forced to migrate because of conflict, environmental stress or other non-voluntary reasons. The sixth symposium, held in Addis Ababa, Ethiopia, in June 2011, therefore addressed these issues.

This report presents a collection of research papers submitted to the Sixth Commonwealth Research Symposium on Teacher Mobility, Recruitment and Migration, organised jointly by the Commonwealth Secretariat and UNESCO International Institute for Capacity Building in Africa (IICBA). The authors of the reports are policy experts, particularly in education and migration issues or education in emergencies. The report presents the key issues and trends in migration and development, followed by the genesis and rationale of the CTRP, its implementation status and challenges, and an examination of issues for new stakeholders, regions and instruments, such as the emerging African continental protocol. This is supported by specific examples from case studies from countries that are applying some of the key principles of the CTRP. Some solutions for better management of migrant teachers are proposed, and suggestions made for better investment in teacher development and recruitment within destination countries instead of actively recruiting from small states or poor countries. The report also addresses some issues not explicitly covered by the CTRP, such as those related to refugee teachers, unorganised recruitment, domestic migration and harmonisation of qualifications among countries. The final paper suggests some proposals for the better management of teachers forced to migrate, considering all these issues raised by the experts.

The papers provide policy-makers and practitioners with a critical and timely analysis of the urgent issues that affect teacher migration, so that they are equipped with the latest evidence to guide them. The report is particularly helpful in identifying issues around the implementation of teacher management instruments and solving them collaboratively, which will assist stakeholders to take the initiative in promoting and institutionalising them, and in addressing issues surrounding teacher migration in difficult circumstances, contributing to increased access to and quality of education for children.

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Deputy Secretary-General
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Notes

1 Gamlen, A (2010), *People on the move: Managing migration in today's Commonwealth*, first report of the Ramphal Commission on Migration and Development, The Ramphal Centre, London, available at: http://www.imi.ox.ac.uk/pdfs/people-on-the-move-managing-migration-in-todays-commonwealth (accessed 29 July 2011).
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2 Hawthorne, L (2008), *Migration and education: Quality assurance and mutual recognition of qualifications*. Summary of Expert Group Meeting (Nine Country Audit), UNESCO, Paris, available at: http://unesdoc.unesco.org/images/0017/001798/179851e.pdf (accessed 28 May 2012).
3 African Union (2006), *The migration policy framework for Africa*, African Union, Banjul, available at: http://www.iag-agi.org/bdf/docs/migration_policy_framework_for_africa.pdf (accessed 28 May 2012).
4 Olubusoye, (2006), *Second Decade of Education for Africa*, African Union, Addis Ababa, available at: http://www.africa-union.org/root/ar/index/INDICATORS%20AND%20DATA%20FOR%20MONITORING%20-REPORT.pdf (accessed 28 May 2012).

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We are also extremely grateful to the following experts who generously peer-reviewed the papers: Dr John Bailey, Professor Maria Pia Bassi, Bill Bolloten, Richard Bourne, Professor Francis Faller, Dr Pauline Greaves, Dr Halla Bjørk Holmarsdottir, Geoff Howse, Amir Jones, Gustavo Armando Infante Marquez, Peter Merckx, Dr Paul Miller, Hamis Mugendawala, Dr Rosemary Preston, Daniel Redondo, Dr Lee Rusznyak, Professor Michael Samuel, Emma Sarton, Jael Shisanya, Dennis Sinyolo, Jon Sward, Dr Louis J van der Westhuizen, Dr Winsome Waite, Gabriel Mwema Waithaka and Peter Williams. Thanks are also due to Anne-Marie Philip for assisting in copyediting and proofreading the papers.

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This publication was edited by Jonathan Penson and Akemi Yonemura.

Contents

Abbreviations and acronyms

AAU	Association of African Universities
ABE	alternative basic education
ACP	African, Caribbean and Pacific Group of States
AfDB	African Development Bank
AFT	American Federation of Teachers
AU	African Union
BSTU	Barbados Secondary Teachers' Union
BUT	Barbados Union of Teachers
CARICOM	Caribbean Community
CCEM	Conference of Commonwealth Education Ministers
16CCEM	16th Conference of Commonwealth Education Ministers
CHOGM	Commonwealth Heads of Government Meeting
CIS	Center for Immigration Studies (US)
CPD	continuing professional development
CTRP	Commonwealth Teacher Recruitment Protocol
DFID	UK Department for International Development
ECA	Economic Commission for Africa
EFA	Education for All
EI	Education International
EMIS	education management information system
EPRDF	Ethiopian People's Revolutionary Democratic Front
EPSR	Education Programme for Sudanese Refugees
ESDP	Education Sector Development Programme (Ethiopia)
ESL	English as a Second Language
ETP	Education and Training Policy (Ethiopia)
GCIM	Global Commission on International Migration
GDP	gross domestic product
GFMD	Global Forum on Migration and Development
GMR	Global Monitoring Report
GUNI	Global University Network for Innovation
HACU	Hispanic Association of Colleges and Universities
HBCUs	historically black colleges and universities
HEQMISA	Higher Education Quality Management Initiative for Southern Africa
HSIs	Hispanic-serving institutions
IDP	internally displaced person
IDRC	International Development Research Centre
IICBA	UNESCO International Institute for Capacity Building in Africa
ILO	International Labour Organization
INEE	Inter-Agency Network for Education in Emergencies
IOM	International Organization for Migration
IRC	International Rescue Committee
JCPS	Jefferson County Public Schools
JRS	Jesuit Refugee Service
KZN	Kwa Zulu-Natal
MoE	Ministry of Education
MoU	Memorandum of Understanding
NEA	National Education Association (US)
NUT	National Union of Teachers (UK)
OAS	Organization of American States

ODA	official development assistance
OECD	Organisation for Economic Co-operation and Development
PEER	UNESCO Programme of Education for Emergencies and Reconstruction
PEN	Pilipino Educators Network
PGCPS	Prince George's County public schools
PTUZ	Progressive Teachers' Union of Zimbabwe
REC	regional economic community
RSD	refugee status determination
SA	South Africa
SADC	South African Development Community
SAQA	South African Qualifications Authority
SARUA	Southern African Regional Universities Association
SNNPR	Southern Nations, Nationalities, and People's Region (Ethiopia)
SNNP REB	Southern Nations and Nationalities People's Region Education Bureau (Ethiopia)
SOLO	Sudan Open Learning Organisation
SOLU	Sudan Open Learning Unit
SOMOLU	Somalia Open Learning Unit
SPLA	Sudan People's Liberation Army
SPLM	Sudan People's Liberation Movement
TDP	Teacher Development Programme (Ethiopia)
TFG	Transitional Federal Government (of Somalia)
TGE	Transitional Government of Ethiopia
TSM	Teacher Service Management (Botswana)
TVET	technical and vocational education and training
UIS	UNESCO Institute for Statistics
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNHCR	United Nations High Commissioner for Refugees
UNICEF	United Nations Children's Fund
UPE	universal primary education
WEO	Woreda Education Office (Ethiopia)
ZANU PF	Zimbabwe African National Union Patriotic Front

1. Introduction

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The Sixth Commonwealth Research Symposium on Teacher Mobility, Recruitment and Migration, organised by the Commonwealth Secretariat and UNESCO-IICBA, took place in Addis Ababa, Ethiopia from 8–9 June 2011. The overall objective of the symposium was to share research on issues affecting teacher mobility, recruitment and migration so that policy-makers would be equipped with the latest evidence to guide them. The Sixth Symposium addressed two main thematic areas: first, learning from the implementation of the existing Commonwealth Teacher Recruitment Protocol (CTRP) to help improve future implementation and the development of new protocols by other organisations, including the African Union; and second, the provision of high-quality inclusive education in difficult circumstances, including the role and status of refugee teachers and the issues surrounding forced migration of teachers. The domestic migration of teachers was also touched on.

This publication brings together the eight papers presented at the symposium, along with five others submitted for the event but which time did not allow to be presented. It forms a companion to the Proceedings Report of the Sixth Symposium.[1]

The first paper, 'Migration and development: Key issues for consideration for the Commonwealth', by Constance Vigilance, sets the scene by reviewing current issues in the migration and development debate. Major development partners such as the World Bank, the International Organization for Migration and the Commonwealth Secretariat are actively engaged on migration and development issues including remittances, international recruitment and brain circulation. The review identifies the ways in which these issues can be addressed by development partners so that developing countries can benefit. It reveals emerging trends, highlights projects reducing the cost of remittances and assesses the impact of international recruitment protocols such as the CTRP. Its findings touch on the important positive impacts of remittances, the diaspora and brain circulation on development, and on the negative impact of 'brain drain'.

'Towards a global response to teacher preparation, recruitment and migration' by Michael Omolewa provides a background to the need to manage teacher migration, and the development of the policies, strategies and instruments designed to achieve this. The paper reviews how some of the major international organisations, especially UNESCO, the Organisation for Economic Co-operation and Development (OECD), the ILO and the Commonwealth, have sought to confront the challenges of teacher training, recruitment and retention. It highlights the major similarities and unique experiences of the organisations' approaches and compares the instruments developed, such as declarations, guidelines and protocols. It then reviews the strategies and modalities of the instruments, and discusses the uniqueness of the CTRP, identifying the major obstacles facing the effective implementation of its goals and objectives. The paper then suggests how the problems can be addressed at the local, national and international levels, and concludes by exploring ways in which the broad principles of the CTRP can be applied beyond the Commonwealth.

Kimberly Ochs' paper 'Revisiting the implementation of the Commonwealth Teacher Recruitment Protocol: Furthering implementation and addressing critical steps in the recruitment process' looks at the review of the implementation of the CTRP, undertaken in 2009, in the light of more recent research, bringing the analysis of teacher management instruments up to date. The paper first re-examines key findings from the review. Next, it reports on a research study that revisited the teachers who featured in the review to assess evidence of implementation that might have emerged since 2009. The study particularly explores the experiences of migrant teachers in identifying work opportunities. A systems analysis of teacher mobility is presented, which identifies key actors, contextual factors, and critical steps in the recruitment and migration process. Finally, critical steps in the recruitment process needing to be addressed to further the implementation of the protocol are identified.

The fourth paper, 'A continental teacher recruitment protocol in Africa: Key considerations from the Commonwealth Teacher Recruitment Protocol' by James Keevy, looks to the future by examining how the challenges and lessons in implementing the CTRP might influence the development of a continental teacher mobility protocol for Africa. The paper articulates the need to think about Africa's distinctive geographical and cultural aspects outside the confines of Eurocentric concepts and categories; to move from 'policy borrowing' to 'policy learning'; to gather accurate data on teacher recruitment; to recognise qualifications through qualifications frameworks; and to increase the professionalisation of teachers. This would ensure that the emerging recruitment protocol is uniquely African and addresses the particular challenges of the recruitment of teachers in Africa.

'Managing teacher recruitment and migration: A case study of the Barbados experience', by Roderick Rudder, describes the institutional frameworks required to implement an instrument like the CTRP successfully. The paper highlights Barbados' experience in managing teacher recruitment and migration. As a small developing state that was losing a large percentage of its teachers to overseas migration, Barbados has undertaken a leading role in the promotion of strategies to manage teacher migration, including in the development of the CTRP. Barbados has been guided by a robust policy framework, which has proved successful due to a number of factors: a flexible but firm approach to balancing teachers' needs with the country's; direct engagement between the Ministry of Education and recruiting governments; the establishment of good working relationships with teachers' unions; promoting both high standards and the provision of incentives for teachers; and institutionalising the policy framework through legislation. This resulted in the protection of Barbados' investment in training of its teachers and contributed to enhanced management of teacher supply and demand.

'Teacher migration and the role of historically black colleges and universities and Hispanic serving institutions in the United States' by Helen Bond looks at the nexus of teacher migration and teacher supply from the point of view of the demand side. The CTRP recommends that recruiting countries have an obligation to manage their own teacher resources better so as not to deplete or displace the resources of other countries. The paper examines how investing in minority teacher recruitment and development at historically black colleges and universities (HBCUs) may help the United States better manage its teacher supply and demand, thus reducing the need to recruit from limited pools of trained teachers in developing nations. The paper notes that teachers trained at HBCUs are suited to working effectively in challenging schools that overseas-trained teachers may have difficulty in, and that encouraging the deployment of teachers from these institutions would reduce demand for teachers who come from more resource-constrained countries.

In 'The need for teachers: an Ethiopian case study', Theodros Shewarget, Theresa Wolde-Yohannes and Akemi Yonemura present a case study on the need for teachers in Ethiopia, thereby comparing local realities with the international policy framework. Ethiopia has recruited a number of teachers from other countries, mainly to satisfy a shortfall in its higher education institutions. Research was undertaken to understand the dynamics of the teacher supply and demand situation, and to compare Ethiopia's recruitment practices

with the principles of the CTRP. The paper finds that, in general, there was a close alignment between the protocol's ethical tenets and the recruitment process. However, Ethiopia still faces challenges in deploying sufficient teachers; there are continued barriers to recruitment; and some impediments to the formulation of bilateral agreements remain.

The eighth paper, by Sadhana Manik, 'Zimbabwean education professionals in South Africa: Motives for migration', moves into the area of forced migration – an area not explicitly addressed by existing teacher management instruments. The paper presents an ethnographic study of the nature of Zimbabwean education professionals' migration to South Africa. The findings illuminate two cohorts of education professionals, teachers and lecturers. They reveal that the professionals exited Zimbabwe for multiple, interrelated reasons mainly connected to the economic situation in Zimbabwe coupled with the current political climate. Together, these negatively influenced the education opportunities available to them in Zimbabwe. The paper concludes with suggestions for education stakeholders in South Africa, such as the need to provide support to Zimbabwean education professionals, who could assist in addressing labour shortages that in South Africa, and to reduce the institutional and social barriers to accommodating them in the workforce.

The next paper is 'Where have all the teachers gone? Why there are never any teachers in Africa's refugee camps and what we can do about it' by Barry Sesnan, and it moves us further into the territory of education in emergencies. The paper highlights the experiences of forced migrant and refugee teachers in conflict-related emergency environments. Detailing five case studies, the paper argues that teachers in difficult circumstances work where salaries are better, but they also need training and support to educate large numbers of children. The paper discusses how an effective teaching cadre can be established quickly where there is conflict or a natural disaster, and outlines gaps in policy provision for migrant teachers in difficult circumstances.

The tenth paper, 'Teacher migration and education in conflict and post-conflict countries: Experience from Somalia' by Christophe Mononye, further discusses teacher migration and education in conflict and post-conflict countries. The paper focuses on the migration of Somali teachers to other countries in search of better conditions and the recruitment of immigrant teachers from other countries to fill the gaps. Three aspects of teacher migration are focused on: teachers' motivations for leaving Somalia; teacher qualifications; and teacher compensation. The paper also discusses some challenges facing teacher management and compensation in crisis situations. It concludes by calling for further discussion to contribute to a greater understanding of planning and management of teacher migration in conflict and post-conflict countries.

In 'Teacher attrition in Wolaita: The cases of domestic migration of Bolosso Sore and Damot Gale woredas by Michael Daniel Ambatchew, takes us back to the local level to look at internal teacher migration, rather than international. The paper concentrates on government primary schools in two districts in the south of Ethiopia, gathering data on teacher attrition. It concludes that although teacher attrition may be one of the problems within the educational system, it may not be as big a challenge as it is first appears. The paper argues that attrition can be a distraction from more underlying issues such as qualified but poorly trained teachers, inadequate teaching materials and poor facilities. The paper stresses the need to consider less capital-intensive and more creative solutions that could both minimise staff attrition as well as mitigate its negative effects, concentrating on empowering local stakeholders to take the necessary course of action themselves.

Regional initiatives to improve and standardise quality have an important role to play in facilitating teacher mobility. In 'Challenges facing higher education in the Southern African Development Community' Louis van der Westhuizen describes the development by the South African Development Community (SADC) and other stakeholders of new mechanisms to improve the quality of education in the region to counter the perceived decline and variation in quality in higher education. Assuring quality education is the key to achieving policy goals such as student and staff mobility and the portability of

qualifications, to regulate private provision, to assure qualification equivalence frameworks, and to increase co-operative teaching and learning. The paper describes the groundwork done to assure quality in higher education provision in the region, and the remaining challenges: to ensure sufficient numbers of qualified pedagogical staff, to improve quality assurance practices, to address capacity needs and to reorient national systems for regional comparability.

The concluding paper attempts to draw together some of the strands emerging from the papers and discussions at the symposium. 'Beyond the Commonwealth Teacher Recruitment Protocol: Next steps in managing teacher migration in education in emergencies' is by Jonathan Penson, Akemi Yonemura, Barry Sesnan, Kimberly Ochs and Casmir Chanda. Teachers are significantly under-represented in refugee populations. By analysing the reasons why this is so, and finding gaps in the existing policy environment and legislative framework, the paper attempts to determine the connections between the issues refugee teachers face, the protection of their rights, and the contribution they are able to make towards increasing access to and quality of education. To exemplify how these issues play out on the ground, the paper describes a case study of Sudanese refugees in Uganda. Following a review of how the learning from the application of the CTRP might be applied to efforts to improve institutional frameworks for the management of teachers in emergencies, the paper concludes with recommendations for policy-makers aimed at protecting the professional role and status of teachers forced to migrate and enhancing their ability to operate constructively in emergency conditions.

The field of teacher migration encompasses a whole range of different disciplines: education and economics; conflict studies and climate change; sociology and psychology. Coming together in a complex and dynamic interplay, in a world where change is occurring at an ever more rapid rate, these issues make understanding the centuries-old phenomenon of migration difficult. But understand it we must. We hope that these diverse papers, taken together, contribute to the onward debate about teacher mobility, recruitment and migration.

PART I. Managing Teacher Recruitment and Migration

2. Migration and development: Key issues for consideration for the Commonwealth

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Abstract

Major development partners such as the World Bank, the International Organization for Migration and the Commonwealth Secretariat are actively engaged in migration and development issues. These issues include remittances, international recruitment, brain drain and brain circulation. Recent data show that there are about 215 million international migrants, equivalent to 3 per cent of the total global population. Remittances worldwide amounted to US$325 billion in 2010, a 6 per cent increase from the previous year and a 246 per cent increase from the 2000 figure of US$132 billion. Activities undertaken by development partners include monitoring of trends, projects to reduce the cost of remittances and international recruitment protocols such as the Commonwealth Teacher Recruitment Protocol. The ways in which the migration of skilled professionals is addressed have had an effect on the corresponding sector in the developing country concerned. Teacher migration, like migration of other skilled professionals such as doctors and nurses, is a subset of the development debate on migration.

This paper reviews the major issues, and the ways in which they can be addressed by development partners so that developing countries benefit. The major findings, obtained through secondary data and a literature review, include the important positive impacts of remittances, the diaspora and brain circulation on development, and the negative impact of brain drain.

Key words
Migration, Remittances, Brain Drain, Brain Circulation, Diaspora, International Recruitment

2.1 Introduction

International migration – an integral part of globalisation – has always been part of human existence. The recent upsurge in international migration has occurred in conjunction with a general increase in flows of trade, investment, finance, cultural products, information and technology (International Labour Organization, 2007). International migration has transnational implications when migrants pursue livelihoods in 'receiving' states and at the same time sustain links and activities in their countries of origin, thus affecting two states (Sriskandarajah, 2008).

Migration plays an important role in many small states, assisting them to diversify employment opportunities and providing funds, through remittances, for schooling, health, and other expenses. For small states in the Pacific region, migration assists with overcoming the limitations imposed by their size and isolation. However, migration and remittances should not be viewed as a substitute for growth, income and employment creation in source countries but as a contributor to the development of the country (Lin, 2009). A general conclusion that can be drawn from existing studies and the experiences of countries of large-scale emigration – such as India, Mexico and the Philippines – is that, on its own, sending workers abroad is highly unlikely to be an effective 'development strategy'. A recent European Committee on Migration report on migrant workers in the global economy thus concluded that 'migration can contribute positively to development

where a country is already poised to develop; it cannot, however, create such a condition' (Taran and Ivakhnyuk, 2009: 16).

The migration of teachers, like the migration of other professionals, such as health workers and engineers, must be viewed within the context of the migration and development debate. Studies by Sives, Morgan, Appleton and Bremmer (2006) and Morgan, Sives and Appleton (2006) show a direct correlation between the migration of teachers and shortages of teachers within the educational system, except in subject areas where shortages had already been identified (i.e. mathematics and science). However, the fact that replacements could be found for migrant teachers does not signify there were no negative repercussions. From the survey done by Sives *et al.* (2006) on the Jamaican education system, the key problem raised by school principals was the loss of experience since migrant teachers were 'seasoned' and were generally replaced with newly qualified teachers. The other issues caused by the migration of teachers include teachers teaching outside their subject expertise, larger class sizes and the difficulty experienced by some children who had developed strong emotional bonds with their teachers. The positive benefits of teacher migration were mainly at the individual level, where teachers benefited financially and professionally. For the wider society, remittances and savings had a positive impact.

The findings of this study on the impact of teacher migration on Jamaica can be applied to most developing countries. As such, there is now global consensus that the time has come for countries to devise appropriate policy responses for migration so as to address the potential drawbacks for origin and destination countries and to maximise possible gains. This summary highlights the recent trends in two major migration and development indicators, discusses the key issues in the migration and development debate and reviews the work of international organisations on this issue. The summary concludes with a brief outline of the way forward in mainstreaming migration and development.

2.2 Recent trends

2.2.1 Number of international migrants

According to UN statistics, there are about 215 million international migrants, equivalent to 3 per cent of the total global population. World Bank data (Ratha, Mohapatra and Silwal, 2011) show that remittances to developing countries amounted to US$325 billion in 2010, a 6 per cent increase from the previous year and a 246 per cent increase from the 2000 figure of US$132 billion.

2.2.2 Remittances

A closer look at remittances from available data (Ratha *et al.*, 2011) shows that the volume of remittances to the various regions varied according to the location of migrants. Remittance flows to Latin America and the Caribbean and Europe and Central Asia declined in 2009 by 12 per cent and 23 per cent respectively due to the recession in Europe and North America where migrants are located. Remittances flows to these regions recovered slightly in 2010 by 2 per cent and 3.7 per cent respectively. Remittance flows to sub-Saharan Africa are estimated to have remained nearly flat during the global economic crisis and registered a modest 4 per cent gain in 2010 to reach US$21.5 billion. Remittance flows to South Asia, and to some extent East Asia and the Pacific, held up and grew robustly in 2010 because of the sectoral and geographical diversification of their migrants in places such as the Middle East that were relatively less affected by the global economic crisis. Remittance flows to South Asia are estimated to have grown by 10.3 per cent in 2010, while remittance flows to East Asia and the Pacific are estimated to have grown by 6.4 per cent in 2010. Remittance flows to the Middle East and North Africa region are estimated to have grown by 5.3 per cent to US$35 billion in 2010.

The top ten Commonwealth recipients of remittances over the period 2000–2008 were India, United Kingdom, Bangladesh, Pakistan, Nigeria, Australia, Sri Lanka, Jamaica, Malaysia and Kenya (World Bank, 2011*b*). In the latest estimates for 2010, India, China,

Mexico and the Philippines retain their position as the top recipients of migrant remittances in US dollar terms. Other large recipients among developing countries include Bangladesh and Nigeria. The top recipients in terms of the share of remittances in gross domestic product (GDP) in 2009 include smaller economies such as Tajikistan, Tonga, Lesotho, Moldova and Samoa.

2.2.3 Net migration

Net migration figures show that the top ten recipients of migrants in the Commonwealth were developed countries (World Bank, 2011*c*).[1] World Bank data shows that South Asia is the top sending region for migrants. For the year 2010, the top ten countries of emigration were, in order: Mexico, India, Russian Federation, China, Ukraine, Bangladesh, Pakistan, the Philippines, Turkey and Egypt. In the same year, the top ten countries of emigration of tertiary-educated migrants were: Guyana, Grenada, Jamaica, St Vincent and the Grenadines, Haiti, Trinidad and Tobago, St Kitts and Nevis, Samoa, Tonga and St Lucia (World Bank, 2011*a*). The high proportion of these that are small island states from the Caribbean or the Pacific is notable.

2.3 Key topics and concepts

The debate on migration and development covers a number of issues. How these issues are prioritised by decision-makers influences the implementation of policies and the actions taken in both the recipient and source countries in the area of migration. These priority issues, which should also be the focus of policy studies and discussion by development partners, include the following.

2.3.1 Brain drain/brain circulation

The idea of 'brain drain', associated with the migration of highly skilled individuals, is the most commonly cited negative consequence of migration on development. More recently, however, the term 'brain drain' has fallen out of favour, to be replaced by terms such as 'brain circulation' (Deshingkar, Gent, Jena and Oppen, 2010). The interactions between highly skilled migration and development highlight many key issues including: the potential of remittances from highly skilled migrants; opportunities for increased international trade and investment; and the prospect of migration encouraging greater uptake of education.

2.3.2 Impact of remittances

If 'brain drain' is seen as the key negative aspect of the pairing of migration-development, remittances are frequently lauded as the key positive aspect. Remittances are important for developing countries at both the macro and micro levels. At the macro level, remittances comprise a large proportion of the GDP in many developing countries, especially small states. Remittances have had a positive impact on source countries through increasing household incomes and reducing poverty. In sub-Saharan Africa, in particular, there is a high transaction cost associated with remittances, stemming partly from lack of competition, regulatory barriers, lack of awareness of available remittance channels and their relative cheapness and accessibility to banks (Katjavivi, 2009). There is also the need to use remittances for more productive purposes, notwithstanding the fact that remittance consumption sometimes dismissed as 'unproductive' goes towards financing schooling for children.

2.3.3 The diaspora

More important than remittances are the international connections that highly skilled migrants create between their country of origin and destination countries. Empirical evidence suggests foreign direct investment from the USA to particular countries is positively correlated with educated migrants from that country living in the USA (Deshingkar *et al.*, 2010). Many diaspora networks have been established to promote

continued links between migrants and their communities or countries of origin. The charitable activities of diasporas can assist in relief and local community development.

2.3.4 International recruitment

Since the 1950s, there has been the recruitment of skilled workers from developing countries to work in priority areas in developed countries. As a cost-saving measure and without addressing the root causes of labour shortages in critical areas, developed countries tend to engage in the international recruitment of specific skilled groups (American Federation of Teachers, 2009). For example, there is empirical evidence (Cali and te Velde, 2008) that recruitment agencies from developed countries target teachers and health workers, mainly doctors and nurses, from the Philippines, South Africa and the Caribbean, and information technology (IT) workers from India. Internationally recruited teachers (American Federation of Teachers, 2009) are often being placed in hard-to-staff inner-city or very rural schools in the US and/or teaching the hard-to-fill disciplines of maths, science and special education. Exploitation of internationally recruited workers is well documented. Recruited workers are often exploited by for-profit recruiters and misled by inflated and inaccurate expectations about life in developed countries, receiving no information about income tax rates or the cost of living (American Federation of Teachers, 2009).

2.3.5 Temporary labour migration

Temporary migration programmes have been described as a 'triple-win' situation: first, they allow destination countries to fill labour needs quickly; second, countries of origin gain from remittances without losing their productive population forever; third, migrants benefit from the opening up of legal, state-supported, migration routes (Agunias and Newland, 2007). According to Abella (2006), temporary migration is important for developed countries with ageing workforces and less mobile societies, and whose industries demand new skills. It can also support strategic industries e.g. those facing chronic shortages in the local labour market because they offer workers very limited opportunities for advancement.

2.3.6 Irregular migration, human trafficking and forced migration

In common with irregular and trafficked migrants, the ability of forced migrants to contribute to development may be limited by their migration status. The uncertainty of irregular migrants' positions in destination countries may also have an impact on the way in which they remit money (Deshingkar *et al.*, 2010). Irregular migrants may be unwilling or unable to access formal banking due to fear of exposing their irregular migration status. However, studies have found that despite their irregular status and informal ways of sending money, remittances from such migrants do benefit sending families and countries. For example, Koser's study (2008) of 50 migrants smuggled to Europe, the USA and Canada from Pakistan and Afghanistan suggests it took them two years to repay their debts to their smugglers. However, once these debts were repaid, their remittances had a significant impact for their families/households left behind.

2.3.7 Impact of global challenges on migration

Migration flows have traditionally been linked to the push created by deteriorating employment conditions in source locations and the pull of better wages and employment conditions in destination. However, global challenges such as climate change and environmental disasters, global economic and financial crises, conflict zones and failed states have exacerbated migration. Foresight (2011) reports that although environmental change will affect migration, it will be difficult to distinguish individuals for whom environmental factors are the sole driver, i.e. those termed 'environmental migrants' by the International Organization for Migration (cited in Thomas-Hope, 2011: 8).

2.4 Engagement of international institutions on migration and development

Several international and regional organisations have recognised the importance of migration to development, and have engaged in work to address the key issues that arise. These organisations are profiled below.

The *Commonwealth Secretariat* is involved in migration and development mainly through three departments: the Economic Affairs Division, the Social Transformation Programmes Division, and the Legal and Constitutional Affairs Division. The activities of the Commonwealth Secretariat can be broadly classified under four main categories: 1) good practice guidelines such as the Commonwealth Teacher Recruitment Protocol and the Commonwealth Code of Practice on the International Recruitment of Health Workers; 2) engagement in collaborative activities such as the May 2007 pre-Global Forum on Migration; 3) policy studies on remittances and other economic development issues; and 4) advocacy on issues such as human trafficking. Commonwealth Heads of Government, at their 2011 summit in Perth, Australia, recognised the need to maximise benefits of migration, both economic and social, as highlighted by the Commonwealth Eminent Persons Group in its recommendation for Commonwealth Heads of Government that 'Commonwealth countries should collectively monitor the ramifications of migration and development in the international community' (Commonwealth Secretariat, 2011: 66).

The *Ramphal Commission* was established in 2010 as an independent commission on migration and development to encourage Commonwealth governments and agencies to take up the question of migration within the Commonwealth. Its goal is to make recommendations for governments and agencies on ways of developing mutually beneficial and practical policies to maximise the benefits of international migration. In its first statement, issued in 2010, entitled 'A Call to the Commonwealth', the commission makes the case for Commonwealth action, and encourages it to take the lead in helping the world to begin a process of managing migration so that it can have significant and positive impacts on the development of the countries of origin (Ramphal Commission on Migration and Development, 2010).

The *Global Commission on International Migration* (GCIM) was requested by the then UN Secretary General Kofi Annan to consider how to frame a global response to international migration. Its report *Migration in an interconnected world: New directions for action* included six principles for action of which the sixth was 'Enhancing governance: Coherence, capacity and co-operation'. This recommended that the governance of international migration should be enhanced by improved coherence and strengthened capacity at the national level; greater consultation and co-operation between states at the regional level; and more effective dialogue and co-operation among governments and between international organisations at the global level (GCIM, 2005). The report was taken forward in 2006 to a UN High Level Dialogue on International Migration and Development, the first UN event devoted to this topic at this level. The future of the Global Commission on Migration and Development is uncertain. It will be assessed before the next UN High Level Dialogue in 2013.

The *Global Forum on Migration and Development (GFMD)* was established by UN member states to address migration and development concerns. These concerns include remittances and diaspora resources, human rights and policy, and institutional coherence. The GFMD provides a forum for policy-makers and promotes the exchange of good practices and experiences, as well as structuring the international priorities and agenda on migration and development. Since 2007, the GFMD has been meeting annually to chart the way forward on international priorities. Under a rotating chairmanship, the sixth meeting of the GFMD will take place in Mauritius, the current chair, in November 2012 to discuss the way forward on circulating labour for inclusive development; factoring migration into development planning, managing migration and perceptions of migration for development outcomes, and gender, human rights and migration.[2]

Table 2.1 Commonwealth trends in migration and remittances

Country	Workers' remittances (US$ Mn)[7]				Net migration ('000)[8]	
	2007	2008	2009	2010	2000–05	2005–10
Antigua and Barbuda	24	26	24	25	–	–
Australia	3,826	4,713	4,579	4,840	132.3	224.9
The Bahamas	–	–	–	–	1.3	1.3
Bangladesh	6,562	8,941	10,521	10,852	−298.7	−581.6
Barbados	141	101	113	123	–	–
Belize	75	78	80	80	–	–
Botswana	105	114	88	100	4.3	4.3
Brunei	–	–	–	–	0.7	0.7
Cameroon	167	167	192	195	–	–
Canada	–	–	–	–	–	–
Cyprus	172	279	153	146	12.4	8.8
Dominica	26	26	25	26	–	–
Fiji	160	123	154	183	−12.4	−5.8
The Gambia	56	65	80	116	−2.7	−2.7
Ghana	117	126	114	136	2.3	−10.3
Grenada	55	55	53	55	−1.0	−1.0
Guyana	283	278	278	308	−6.6	−8.0
India	37,217	49,977	49,468	54,035	−384.6	−600.0
Jamaica	2,144	2,181	1,912	2,011	−15.2	−20.0
Kenya	1,588	1,692	1,686	1,777	5.0	−37.9
Kiribati	–	–	–	–	–	–
Lesotho	625	596	623	746	−5.4	−4.0
Malawi	–	–	–	–	−4.0	−4.0
Malaysia	1,556	1,329	1,131	1,301	79.3	16.9
Maldives	3	3	4	4	−0.0	−0.0
Malta	50	54	51	48	1.7	1.0
Mauritius	215	215	211	226	–	–
Mozambique	99	116	111	132	−4.0	−4.0
Namibia	16	14	14	15	−1.6	−0.3
New Zealand	654	641	628	843	27.3	13.0
Nigeria	9,221	9,980	9,585	10,045	−34.0	−60.0
Pakistan	5,998	7,039	8,717	9,690	−350.0	−400.0
Papua New Guinea	8	15	12	15	–	–
Rwanda	51	68	93	92	–	–
Samoa	120	135	131	143	−3.6	−3.1
Seychelles	11	8	12	11	–	–
Sierra Leone	42	28	47	58	100.0	12.0
Singapore	–	–	–	–	46.5	144.4
Solomon Islands	2	2	2	3	–	–
South Africa	834	823	902	1,119	140.0	140.0
Sri Lanka	2,527	2,947	3,363	4,155	−20.0	−50.0
St Kitts & Nevis	40	44	43	44	–	–
St Lucia	31	31	30	31	−0.1	−0.2
St Vincent & the Grenadines	33	31	30	31	−1.0	−1.0
Swaziland	100	90	93	109	−9.2	−1.2
Tonga	101	94	72	85	−1.6	−1.6
Trinidad and Tobago	109	95	109	120	−4.0	−3.9
Tuvalu	–	–	–	–	–	–
Uganda	452	724	778	915	−1.0	−27.0
United Kingdom	7,883	7,862	7,252	7,532	193.7	204.0
United Republic of Tanzania	14	19	23	25	−69.0	−60.0

Continued

Table 2.1 Commonwealth trends in migration and remittances (continued)

Country	Workers' remittances (US$ Mn)[7]				Net migration ('000)[8]	
	2007	2008	2009	2010	2000–05	2005–10
Vanuatu	6	6	6	6	–	–
Zambia	59	68	41	44	−16.3	−17.0
TOTAL	**83,580**	**102,018**	**103,638**	**112,592**		

Sources: World Development Indicators database, http://databank.worldbank.org/dpps; UN World Population Prospects database, http://data.un.org.

The *Global Migration Group*[3] is based within the UN structure itself, alongside the Global Forum process. The group is formed of the heads of agencies who meet on a regular basis under a revolving chair every six months. At the time of writing, the group is headed by the Office of the High Commissioner for Human Rights. It aims to promote the coherence of activities around migration and development and also to optimise activities of its member bodies. The work plan for 2010 focused on promoting the mainstreaming of migration into policies for human development and analysing the implications of the global economic and financial crisis for migration and migration policies.

At the UN, preparations are currently underway for the second *High Level Dialogue on Migration and Development*, scheduled for 2013. The UN General Assembly held the first High Level Dialogue in 2006. Since this forum, many countries have implemented innovative policies and programmes to engage diasporas in development and reduce the cost of remittances. The 2013 forum is expected to focus on migrants' contribution to development and improving international co-operation on international migration and development.

In July 2009, the *African, Caribbean and Pacific Group of States* (ACP) established a migration facility called ACP Migration[4] to: collect migration data; build the capacity of civil society groups working on migration and development; provide information for migrants and potential migrants; and push for greater coverage of migration and development issues in national and regional governments and institutions.

Much of the *European Union's* work on migration and development is done through partnership with other regional bodies, for example, under the Cotonou Agreement with ACP countries or with international organisations such as the UN under the auspices of the EC-UN Joint Migration and Development Initiative.[5] This acts as an information source on migration and development, and funds a variety of projects operated by civil society groups, universities and local authorities, globally.

The *World Bank* monitors global migration and remittance flows and contributes to the global policy agenda on migration and development. The Migration and Remittances Team is the Bank's focal point on remittances. The World Bank has also been working in migration and development through its regional departments. The Europe and Central Asia region has been active in providing a range of live and virtual interactive programmes to support the improvement of the environment of migrant workers within the Commonwealth of Independent States. In South Asia, the World Bank recently launched a regional research initiative to benchmark cross-border labour mobility and remittances and their implication for economic development in South Asia. In Africa, the Africa Migration project is being undertaken jointly with the African Development Bank (AfDB). It seeks to improve the understanding of migration and remittances in sub-Saharan Africa, including their magnitude, causes and impacts on poverty reduction, with a view to generating informed policy recommendations. It also seeks to strengthen the capacity of policy-makers, researchers, financial institutions and donor agencies in Africa to enhance the development impact of migration and remittances in Africa. The World Bank also convenes various seminars and conferences and publishes widely on various topics of migration and development.

The *African Development Bank* is working on the reduction of costs of remittances and their mobilisation. It has also engaged with several partners and in particular with France to explore the ways and means for mobilising remittances and to promote the positive impacts of their use, not only for beneficiaries, but also for the development of recipient countries. In addition, conferences have been convened, publications issued and projects such as the Migration Trust Fund implemented.

The *International Organization for Migration*[6] (IOM) aims to promote humane and orderly migration by providing services and advice to governments and migrants. It also aims to promote international co-operation on migration issues, to assist in the search for practical solutions to migration problems and to provide humanitarian assistance to migrants in need, whether refugees, displaced persons or other uprooted people. The IOM constitution recognises the link between migration and economic, social and cultural development, and also acknowledges the right of freedom of movement of persons. Areas of work include migration and development, facilitating management, publications regulating migration, forced migration, policy activities, conferences and projects such as Improving Knowledge of Remittance Corridors and Enhancing Development through Inter-Regional Dialogue.

2.5 The way forward

The link between international migration and development means that economic issues resulting from migration, namely remittances and the skills of the diaspora, are resources that can be used to aid poverty reduction and foster development. The two main international fora for the discussion of migration – the GFMD and the UN High Level Dialogue – have served to enhance the migration and development debate. In addition, development partners such as the Commonwealth Secretariat, IOM and the World Bank have made significant contributions to the analysis and advocacy of migration and development issues. Although much has been achieved since the first High Level Dialogue on migration and development held by the UN General Assembly, more needs to be done to ensure that the developmental impact of international migration is mainstreamed into national economic development planning. The Commonwealth Secretariat, mainly through its Teacher Recruitment Protocol, has made significant contributions to national efforts in this regard. However, much more needs to be done to overcome national challenges in addressing migration. The mushrooming of non-governmental organisations (NGOs) working on migration, as well as increased focused by development partners, is a step in the right direction.

In charting the way forward, there needs to be more collaboration among development partners, greater scope for NGOs to function effectively, and capacity building for developing countries on migration and development. Areas for increased focus can include: bringing developing country concerns to multilateral discussions; policy development on migration in order to influence government policy discourses related to migration, poverty and development; improving data collection on migration; and understanding the qualitative issues behind the migration numbers.

Notes

1 These figures tend not to include irregular migrants. This means that the total number of migrants in some countries might be significantly under-reported. For example, Bourne (2011) claims there may be up to 700,000 Zimbabwean migrants alone in South Africa.
2 www.gfmd.org.
3 www.globalmigrationgroup.org/.
4 www.acpmigration.org.
5 www.migration4development.org.
6 www.iom.int.
7 Migrant remittances refer to workers' remittances and compensation received (US$m).
8 Net migration refers to number of immigrants minus number of emigrants. It is expressed as thousands.

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3. Towards a global response to teacher preparation, recruitment and migration

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Abstract

This exploratory paper relates the background to the emergence of the desire for a framework to regulate teacher preparation, mobility, recruitment and migration. It assesses the instruments created by major international organisations, especially UNESCO, OECD, ILO and the Commonwealth Secretariat, to confront the challenges of teacher training, recruitment and retention. It draws out the unique experiences from the approaches used by these organisations, and compares the different instruments developed such as declarations, guidelines and protocols. The paper reviews the strategies and modalities of the instruments, and discusses the uniqueness of the Commonwealth Teacher Recruitment Protocol (CTRP). Finally it identifies the major obstacles facing the effective implementation of the goals and objectives of the CTRP and how the problems can be addressed at the local, national and international levels. It concludes by exploring ways in which the broad principles of the CTRP can be applied beyond Commonwealth countries and made globally operational, a legally enforceable deal, covering all countries.

Key words
Teacher Training, Recruitment, Global, Negotiation, Consensus, Social Justice

3.1 Introduction[1]

This exploratory study seeks to draw attention to how the global community has tried to address the topical subject of how education systems are undermined by a lack of adequate professional development of teachers, the international recruitment and migration of trained teachers, and the subsequent exploitation of migrant teachers. It will also provide a background to the emergence of new governmental instruments related to the welfare of teachers, and will seek to explore how some key international organisations have responded to these issues.

The core purpose of this paper is to focus on the creative contribution of the Commonwealth Secretariat through the Commonwealth Teacher Recruitment Protocol (CTRP), which has been adopted by Commonwealth ministers of education. The CTRP aims:

> to balance the rights of teachers to migrate internationally, on a temporary or permanent basis, against the need to protect the integrity of national education systems, and to prevent the exploitation of the scarce human resources of poor countries (Commonwealth Secretariat, 2004: 7).

The paper will highlight strategies and methods that characterise the resultant instruments, and discuss the uniqueness of the CTRP. It will also undertake an exploration of how the initiative has been adopted globally and how it has become an international platform for the development of teachers' interests and value. The paper will then identify the major obstacles faced in implementing the laudable goals and objectives of the CTRP effectively, and suggest ways in which these problems can be addressed at local, national and international levels. It will explore the principal similarities as well as the unique experiences found in the differing approaches of the organisations involved, and compare the instruments developed consequentially. The paper concludes by

exploring ways in which the broad principles of the CTRP could be adopted in countries beyond those of the Commonwealth.

3.2 Topical questions

Teacher qualifications and training, professional development, recruitment and mobility are intertwined with concerns about the development of nations, social justice and equity. Several questions derived from the subject have continued to engage the attention of some of the world's key players in the educational domain. These relate to quality assurance and the recognition of qualifications, the development of the professional status of teachers, and teacher migration and mobility.

Teacher preparation, recruitment, retention, welfare and professionalism have an important impact on developing countries. They are also relevant to more developed countries through the role of the teacher in cultivating the potential of individuals and wider communities. This relevance has grown following the increased vulnerability of, and the demand for, teachers locally and internationally, thus compelling local and international institutions and organisations to study the subject.[2]

Studies by scholars such as Hawthorne (2006, 2008), Degazon-Johnson (2010; Ochs, 2011), Joseph (Degazon-Johnson, 2010; Ochs, 2011), Manik (Degazon-Johnson, 2010; Ochs, 2011), and Ochs (2003) have made an impressive contribution, producing definitive studies on the subject in their authors' localities. In general, most studies have suggested that the migration of personnel may have grave social and political consequences, restricting the advancement of developing countries in particular (IDRC, 2005).

We should also note that the subject of personnel movement across borders has become globally significant. Labelled 'brain drain', or 'brain gain', depending on the viewpoint, it is not limited to a single profession and extends beyond the traditional examples of teachers and nurses. For example, professions such as banking have recently reported 'the unprecedented brain drain of talented executives, especially to Asia, mostly from New York and London' (City AM, 2011: 3). The Future University (FU) of Japan has been at the forefront of studies on cross-border education. Malcolm Field of the FU is convinced that 'across-border education is inevitable' and that 'the opportunities and benefits are too numerous to ignore' (Field, 2009: 17).

Studies have shown that teachers are constantly being exploited both at the state of origin and abroad. In many countries, teachers' pay is often considered to be inadequate and some teachers have objected that their take home pay cannot, in fact, take them home (Aladeselu, 2010: 16). Teachers also experience frustration that their colleagues and classmates who chose other professions continue to be better rewarded. It is imperative that research be focused on addressing the 'push' factor that has compelled teachers to offer their services outside their home of origin. There is an urgent need to examine the quest by teachers for the 'greener pasture': why they leave their native countries in search of better conditions of service, wages and salaries, recognition, respect and the promise of a better future. What also are the motives of enhancing international relations and intercultural understanding and promoting social justice, for example, with education professionals volunteering in developing countries? How are their home countries able to respond to these questions?

How have the countries involved responded to the subject of utilising trained teachers effectively? There are some countries that make provision through legislation, budget and policy for their teachers trained abroad. There are provisions for return passage, welfare and appointment on return to their home countries. Other countries, however, are indifferent to any issue of development that does not affect them directly. Indeed, some are known to have been glad to get rid of the more articulate and vocal members of society, who could challenge them on their return and thus disturb the peace. In response, teachers consider it wise to stay behind in the countries that trained them. For those that stay behind there remain larger issues such as dealing with the differences in working

conditions, learning environment and general economic gains. And they are compelled to consider their level of access to healthcare, the education of their children, pensions, security and being able to take care of family members, as demanded by their culture.

This development should draw attention to the subsequent vulnerability of teachers from the developing world, especially those escaping emergency situations, and the consequences involved when they are forced to choose between remaining abroad or facing the challenge of returning home as a dissident.

Perhaps one should first briefly discuss how an international organisation, the United Nations Educational Scientific and Cultural Organization (UNESCO), has intervened in the subject.

3.3 The UNESCO initiative

UNESCO has taken a leading role in generating awareness of the importance of protecting, promoting and developing the teaching profession. As the specialised agency of the United Nations entrusted with the global development of education, scientific and cultural issues, UNESCO has recognised its responsibility to teachers and the teaching profession. To this end it has specialised institutes, one in Paris for educational planning and management (the International Institute for Educational Planning), one in Geneva for curriculum development (the International Bureau of Education) and another one in Addis Ababa for teacher development (the International Institute for Capacity Building in Africa).

Furthermore, through the networks developed from its establishment, UNESCO has sought to influence advancements in the broad field of education through the exchange and sharing of knowledge and information on the 'best practices' in the field (Omolewa, 2007). Thus from its very foundation, the first Director-General of the organisation, Dr Julian Huxley (representing UNESCO at the Sixth Commonwealth Universities Congress, held in Oxford in July 1948), reported that the Congress on World Universities (convened by UNESCO in Utrecht from 2 to 13 August 1948) would consider the subject of 'standardizing degrees' (Association of Universities of the British Commonwealth, 1951: 39). UNESCO recognised the value of bringing order to the issue of qualification awards across world frontiers.

UNESCO, recognising the importance of working with the International Labour Organization (ILO) on this matter, established a partnership to promote labour issues, including the conditions of service for workers, remuneration and training. Together, the two organisations reviewed the working conditions of teachers, who are in some cases under-prepared and/or under-paid. This resulted in the ILO/UNESCO Recommendation Concerning the Status of Teachers (1966) and the UNESCO Recommendation Concerning the Status of Higher-Education Teaching Personnel (1997).

Both UNESCO and the ILO have taken the lead in ensuring that teaching personnel are able to work in an atmosphere conducive to their profession. This includes training and continued retraining. Today's knowledge will be inadequate to meet the challenges of tomorrow, so it is expected that teachers should maintain a standard of training so that their skills remain relevant. Other issues raised by ILO/UNESCO have included the stability of teaching jobs, appropriate remuneration, salaries and wages, and the rewards of service in the form of promotion.

There has also been the question of responsibility of teaching personnel with regard to their own discipline and duties. UNESCO has developed relationships with non-governmental organisations (NGOs) active in the field of teacher education. Through the NGO Committee of its Executive Board, UNESCO reviews its relationships periodically with NGOs, following reports of their continued relevance and contribution.

In a similar way, UNESCO worked with the Organisation for Economic Co-operation and Development (OECD) to establish the UNESCO/OECD Guidelines for Quality Assurance in Cross-border Higher Education. Developed in response to the increase in

education being offered across country borders, these non-legally binding guidelines promote transparency, security and information about the types and quality of education offered to students, while respecting the national sovereignty of countries.

UNESCO has also been receptive to the contribution of other major international organisations and agencies that have expressed a concern about aspects of teacher preparation, qualification, retention and migration. For example, the Economic Commission for Africa (ECA) had addressed the subject on several occasions. Its Deputy Executive Secretary, Dr Lalla Ben Barka, who is currently an Assistant Director-General of the Africa Department of UNESCO, but who was formerly Deputy Secretary-General of the ECA, expressed concern about the exodus of human capital from Africa (IDRC, 2005).

The ECA has in turn worked with the International Organization for Migration (IOM) on the vast subject of the brain drain, with special focus on Africa. Additionally, the IOM has partnered with both the International Development Research Centre (IDRC), as well as the Association for Higher Education and Development (AHEAD), which shares an interest in human capital movement across borders.

3.4 The Commonwealth initiative

Activities to support the implementation of the CTRP remain important to the Commonwealth Secretariat, as the paper by Kimberley Ochs in this collection suggests. This is in part due to its provenance, which should be understood in its historical context. Sanders (1990) suggests that there is continuity evident in the ways in which British expertise and support were shared following the collapse of the British Empire. Moreover, the role of British colonial-era missionaries in the provision of education in other countries during this time was important (Ajayi, 1965). Given this perspective, it is important to note the collective nature of the response to demands by individual countries for a solution to the issue of the teachers of certain countries being the subject of targeted and organised recruitment by other countries. The CTRP is a tool backed by consensual ministerial mandate and formal adoption, in both cases by Commonwealth ministers of education. We may note that many Commonwealth countries were concerned by the brain drain phenomenon and targeted recruitment, which have adversely affected the labour market and human capital of small states.

Many partners of the Commonwealth have also committed themselves to working collaboratively to explore the issues surrounding teacher recruitment and migration. For example, the United Kingdom (UK) Department for International Development (DFID) commissioned a study on these issues from the University of Nottingham (see Morgan, Sives and Appleton, 2006). Building on this, the Commonwealth Secretariat compiled a report on the status of teachers, and the impact of the 'poaching' of teachers from the poorer parts of the world by more advanced countries.

Defining, or at best describing, the Commonwealth is likely to be a complicated matter. Here is a body that is not guided by a constitution but by precedents and declarations emanating usually from meetings and informal agreements. Lord David Howell, who presided over the House of Commons enquiry into the role of the Commonwealth, described the organisation as 'an informal global network' (2011). Another observer, Chadwick has explored what he calls the 'unofficial Commonwealth' (1982). Yet another insider has described the Commonwealth as 'the product of colonial relationships which were subsequently transformed to partnerships of equality, characterised by interdependence and challenges of political, social and economic development' (Srinivasan, 1998: 2). It is seen by one of its proponents as a partnership 'of equals rather than a family of children and grandchildren in regular touch with the parental home' (Zajda, 2008: 37).

Described as a diverse group, celebrating cultural differences, the Commonwealth is nonetheless united by core values that are shared and actively promoted. The fundamental basis for these values includes a demand for equity, fairness, integrity, social justice and

transparency. The Commonwealth has been considerably influenced by the decisions and outcomes of the Commonwealth Heads of Government Meetings (CHOGMs).

An explanation of the Commonwealth's interest in the area of teachers' rights can be found in the nature of its traditional commitments. Unique as an assembly of smaller, less powerful countries, but sharing a common heritage and similar values with some of the most powerful nations of the world, the Commonwealth views itself as a family (Srinivasan, 1998). Confronting the issues that affect the poorer and weaker members of society was therefore in some ways considered to be an ethical matter. The Commonwealth also perceived the issues surrounding teacher training, qualification, retention, mobility and migration as the results of accelerating globalisation. As Sánchez Sorondo, Malinvaud and Léna observe, globalisation is associated with 'exacerbating social inequality' (2007: xix).

Commonwealth education ministers responded swiftly and efficiently to reports of the disadvantages experienced by teachers who had transferred their services across borders, and to the petitions about the effects of the recruitment of teaching personnel from member countries. Ministers of education in the Caribbean were the first to express grave concerns about this at a retreat in July 2002. The *Savannah Accord*, which followed the meeting, requested that the matter be explored further. The Commonwealth Secretariat thereafter took up the issue and commissioned Kimberley Ochs to prepare an evidence-based report on the status of the international migration of teachers. Ochs' report, which among other things documented the experiences of overseas teachers working in the UK, was published in September 2003.

At the 15th Conference of Commonwealth Education Ministers a request was considered for the establishment of a Commonwealth working group, which met a number of times and developed a draft protocol on teaching recruitment. The protocol was then accepted and adopted on 1 September 2004.

The Commonwealth felt compelled to confront two distinct issues: (i) the unregulated exploitation of teacher stocks of small developing countries by recruitment agencies; and (ii) lack of protection for recruited migrant teachers in more developed countries. The protocol is unique in many ways. For example, it goes beyond the level of traditional declarations and guidelines. Although not legally binding, and not a legal instrument or convention, it has the potential of stirring up the conscience of member states and professionals involved at the stages of training, qualification recognition and staff recruitment, so that they might take a fresh look at the issues. From this perspective, the protocol may be described as the beginning of the process of addressing an issue of social justice. Its value lies in its moral authority, rather than its legal weight.

The Commonwealth has thus through its several networks and platforms given considerable visibility to the issues of social justice. Ministers of education have more frequently included the subject in their periodic conferences. Following the adoption of the CTRP, an annual symposium has been instituted to focus attention on the subject of teacher recruitment, and there have since been five such symposia. There have also been publications of proceedings and special research findings, one of the more recent being the 2010 publication by James Keevy and Jonathan Jansen titled *Fair Trade for Teachers: Transferability of Teacher Qualifications in the Commonwealth*.

The Commonwealth attempts to address the concerns of the poorest, smallest and perhaps most voiceless peoples spread across sometimes very tiny islands throughout the world. One of the mechanisms used is to mobilise support, first among the developing countries themselves, and then among the developed countries. The Commonwealth is keen to extend its frontiers of interest and to encourage its member states to think 'outside the box'. Thus it has sought to establish a platform for greater participation and consensus building. Some progress has already been made in expanding the membership of the Commonwealth beyond the traditional family of those with historical ties to the British Empire. Thus Francophone Cameroon and Rwanda, and Lusophone Mozambique have become active members.

At a professional level, the United States of America (USA) has been involved as the National Education Association (NEA) in the United States hosted the Fourth Commonwealth Teachers' Research Symposium in 2009. During the symposium, case studies in the exploitation of migrant teachers were considered. The American Federation of Teachers has also continued its participation in discussions of the subject. This is a crucial development considering the role the USA plays in world events.

Teacher unions have played a key role in promoting the CTRP, with, for example, the UK National Union of Teachers (NUT) supporting the annual meetings of the Commonwealth Advisory Council for Teacher Mobility, Recruitment and Migration. This council works towards raising awareness of, and enhancing the implementation of, the CTRP, and currently includes representatives from the Commonwealth Consortium for Education, the Commonwealth Secretariat, Education International (EI), ILO, NUT, Commonwealth ministries of education and a former UNESCO representative, indicating the wide appeal of the CTRP. Similarly, representatives from teacher unions have attended the Teacher Research Symposia, which aim to provide a platform for research on issues relating to the CTRP and which have been supported by organisations including the NUT and Commonwealth Teachers' Group; the NEA; EI; the South African Qualifications Authority and the University of the Free State; and the UNESCO Institute for Capacity Building in Africa. The UK National Association of Schoolmasters Union of Women Teachers has also recognised the value of the CTRP (McNamara, Lewis and Howson, 2005).

3.5 Negotiated consensus

Like UNESCO, OECD and ILO, the Commonwealth through its CTRP is concerned about standards, quality and equity in education. For this shared vision of training and retention of teachers, these organisations have emerged with texts that have been variously called declarations, guidelines, decisions, resolutions, instruments or protocols. However, they have not reached the status of conventions and are not legally binding. Their enforcement thus becomes difficult, as the organisations rely on the willingness of countries to respect their commitments and the negotiated consensus-based pronouncements.

The agreements reached by these international organisations share other common characteristics. The first is that they are all a manifestation of the commitment to engage countries in a discourse on finding ways to improve the performance of teaching personnel. To this end, there have been various assumptions and expectations about the way forward. Specifically, all the organisations have sought to confront the challenges of teacher training, recruitment and retention.

Another feature to be found in the evolution of these texts is that they attempt to find a consensus, allowing all the various shades of opinion to be accommodated and encouraging all parties to have an input. Sometimes the discussions begin at the level of committees or expert groups, sometimes as recommendations from professional organisations. But in all of these, the organisations have consistently used the familiar tools of discussion, negotiation and debate. Sometimes, however, people and governments finally give support, not necessarily because they are completely convinced or converted, but because of practical or tactical reasons not to block the majority from moving forward. It will be noticed that many of the players have not developed the same level of awareness of the issues being discussed and canvassed as others, and that the level of implementation of these instruments varies considerably among countries.

A further common element in this dialogue and consultation is that the negotiating partners are often of uneven capacity of knowledge or of negotiating skill. Although there is an acceptance of the equality of each member country, and the assumption that the size of the negotiating partner is not an issue because they are all sovereign states, in reality and practice this is by no means true. However, the first Commonwealth Secretary-General, the Canadian former civil servant Arnold Smith, observed that 'the shafts of light

that illuminated the thinking and subsequent actions of Commonwealth countries have come as often from the leaders of the smaller and newer states, as from the older and larger countries' (Smith, 1981: 282). Often, the most successful actions have also involved the myriad civil society organisations of varying sizes and capacities, as governments cannot undertake all development initiatives and enterprises for their people.

3.6 Conclusion

This paper observes that there has been an important global response to the questions raised in tackling the issues of teacher preparation, qualification, recruitment, retention and mobility. It is also noted that all the global bodies have concentrated on governmental instruments that could influence action in the field of practice. They have worked on adopting a set of principles that would make for greater effectiveness, efficiency and relevance, through advocacy and good leadership. However, there is a limitation: the documents produced – declarations, guidelines and recommendations – have failed to be legally binding. Indeed, some countries have noted that they were not compelled to put into operation the items that had been collectively endorsed.

If the world becomes a global village, then it is vital that every member of that village accepts some responsibility for the welfare of the community as a whole. A good beginning would seem to be establishing the principles of the CTRP globally, hopefully operating up to the level of the United Nations. To achieve this objective, the protocol will need to be augmented by studies, advocacy and lobbying, and translated into other languages. It may be useful to appreciate the parts played by civil society groups, national parliaments and the media in generating sufficient awareness. After all, these were some of the methods used effectively by the movement for the abolition of the slave trade. Thus the partnership of Christian and other faith groups, members of parliaments, politicians and the media, which has proved useful in the past, may be further exploited in the expansion of the CTRP principles.

Given their importance, each country will have to face the issues of teacher retention, recruitment, mobility and migration. Leaders must show commitment to identifying strategies that will address the challenges posed by these issues. Relevant institutions, including teachers' unions, civil society organisations and international partners, may be called upon to generate awareness of the issues.

Countries should be encouraged to focus some attention on this important matter, and it is the responsibility of all governments to make duty of care issues central to their work. This means that governments should be encouraged to develop plans that are credible and measurable to tackle the issues. There should be a mechanism in place to compel all governments to be made accountable. Perhaps the adoption of a UN convention on teacher mobility, recruitment and migration would be a first step in that direction.

By the nature of the social, economic and political implications involved in the effort to address teacher preparation and recruitment, leaders certainly have a great deal of discussion, debate and negotiation ahead of them. The emerging instrument should therefore constitute a legal document that must be binding, and thus approved by parliaments.

One way to do this is to encourage regional institutions, such as the European Union and the African Union, to adapt the CTRP into a working instrument. The United Nations may also be encouraged to convene a meeting for the consideration of a possible agreement that would be legally enforceable, and ultimately legally binding. In this way, teachers' rights will become recognised and respected and the pioneering role of the CTRP complemented and further advanced.

Notes

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2 Study has been done at different levels and has involved a variety of bodies such as the Association of African Universities, the National Union of Teachers in the UK and the Nigeria Union of Teachers.

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4. Revisiting the implementation of the Commonwealth Teacher Recruitment Protocol: Furthering implementation and addressing critical steps in the recruitment process

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Abstract

This paper revisits the 2008–2009 review of the implementation of the Commonwealth Teacher Recruitment Protocol, commissioned by the Commonwealth Secretariat in response to a directive by Commonwealth education ministries in 2006 (Ochs and Jackson, 2009). With a view towards informing activities and policies that further the implementation of the protocol, this paper first presents key findings from the review. It then reports on research conducted in 2011 that revisited the migrant teachers from the 2008–2009 study to explore their situation further, as well as on key developments at the international level regarding teacher migration. A systems analysis of teacher mobility is presented, which identifies key actors, contextual factors and critical steps in the recruitment and migration process. In conclusion, recommendations for further protocol implementation are recommended.

Key words
Teacher, Migration, Recruitment, Commonwealth, Commonwealth Teacher Recruitment Protocol

4.1 Introduction

The Commonwealth Teacher Recruitment Protocol (CTRP) was adopted by Commonwealth ministers of education in the United Kingdom on 1 September 2004, with the main objective to:

> … balance the right of teachers to migrate internationally, on a temporary or permanent basis, against the need to protect the integrity of national education systems and to prevent the exploitation of the scarce human resources of poor counties. The Protocol also seeks to safeguard the rights of recruited teachers and the conditions relating to their service in the recruiting country (Commonwealth Secretariat, 2004: 7).

In a presentation at the 16th Conference of Commonwealth Education Ministers (16CCEM) in 2006, it was reported that the level of implementation of the protocol varied greatly among Commonwealth nations. Ministers therefore requested a review of the implementation in preparation for the 17th Conference in 2009 to assess the:

- *quality, content and impact of initiatives, policies, programmes, practices and procedures that countries developed and implemented as a requirement of the adoption of the CTRP;*
- *effectiveness of organisations and institutions, such as international and civil society organisations and teachers' organisations, in advancing the implementation of the CTRP;*
- *extent and effectiveness of the Commonwealth Secretariat in implementing the Future Actions of the Protocol and in conducting advocacy for the CTRP implementation* (Ochs and Jackson, 2009: ix).

The subsequent review, conducted between September 2008 and March 2009, explored the implementation of the protocol with regard to five dimensions: (1) Commonwealth ministries of education; (2) Commonwealth Secretariat; (3) civil society organisations and institutions (including partners); (4) teacher recruiters; and (5) teachers. Eighteen of the 53 Commonwealth countries responded to the survey sent to ministries of education. Interviews were conducted with 12 civil society organisations and ten recruitment agencies. A survey was administered to more than 3,000 migrant teachers, yielding 64 surveys that were included in the analysis.[1] In addition, in-person focus groups were held in Barbados and Trinidad and in-depth interviews were conducted with 16 of the 64 teachers.

Key findings from the 2008–2009 review were as follows:

- *The vast majority of the 64 migrant/recruited teachers in the study (82.5 per cent) were unaware of the protocol.*
- *Teacher recruitment and migration are global phenomena.* In addition to intra-Commonwealth recruitment, teachers are being recruited at significant levels to non-Commonwealth countries (including the US, the Republic of Korea, Japan and Middle Eastern countries such as Bahrain, Oman and Saudi Arabia).
- *Context is central to the implementation of the protocol.* Macro-level issues determine migration flows, demand for teachers and teachers' individual choices to migrate.
- *Data on teacher movement, recruitment agencies and recruited teachers are not being captured by ministries of education.* A subsequent recommendation, agreed by the Meeting of the Commonwealth Working Group on Teacher Recruitment, suggested that:

  > emphasis should be placed on strengthening existing data management systems and monitoring data and information at regional/international and country level to address issues relating to tracking teacher turnover, recruitment, deployment and relevant information about each foreign recruited teacher (Ochs and Jackson, 2009: xi).

This paper sets out to revisit the key findings of the implementation of the Commonwealth Teacher Recruitment Protocol with a view towards informing further implementation initiatives. The first section reports on research conducted in Spring 2011 that revisited the experiences of the recruited teachers from the first study and explored possible changes that might have, or might not have, occurred since 2009. Subsequently, a systems analysis of teacher migration is presented as a tool for the discussion of key actors in future implementation initiatives. This analysis also highlights the importance of context in examining teacher migration.

4.2 Revisiting the issue of teacher migration

In Spring 2011, the 64 teachers who provided responses to the 2008–2009 study were contacted again to explore their current situation. Twelve of the original 64 teachers, residing in the Caribbean, UK and South Africa, provided further information that helped to clarify their migration stories, particularly as it related to their serial migration:

- Between 2009–2011, teachers had changed jobs and/or countries of location. In the case of one teacher, she had moved on to two additional countries since she responded to the first survey in 2009.
- None of the teachers had either received any information related to, or heard any more about, the Commonwealth Teacher Recruitment Protocol since the last study.
- In subsequent moves, recruitment agencies did play a role both in making teachers aware of opportunities to teach abroad and in placing the teachers in teaching positions.

- The most important factors for teachers in deciding to take up a position abroad were compensation (salary in relation to living expenses) and opportunities for professional development.
- Teachers reported having their qualifications screened before taking up a new position.

The findings suggest that general teacher mobility could be both a challenge to implementation and/or an asset to further implementation, if mobile teachers themselves are engaged in awareness-raising activities among colleagues.

One of the findings of the 2008–2009 study was that teacher migration patterns were highly dependent on context and had changed since the 2003 study (Ochs, 2003) commissioned by the Commonwealth Secretariat to inform the development of the Commonwealth Teacher Recruitment Protocol. During that period, there was strong evidence in the data indicating that schools in Middle Eastern countries, such as Qatar, United Arab Emirates (UAE) and Bahrain, were particularly attractive to teachers given and offering generous compensation packages, tax breaks and/or subsidised accommodation. In 2011, the same recruited teachers reported that their most important factors in selecting a position were compensation and professional development opportunities. Therefore, an understanding of the compensation and development opportunities for teachers could be helpful in refining and further developing protocol implementation strategies to reach mobile, talented teachers who are actively seeking the 'best' opportunities.

This most recent study also confirmed earlier findings regarding the importance of both qualification agencies – that review, monitor and grant qualifications – and recruitment agencies. Arguably, focused strategies that could raise awareness of the protocol in these organisations could benefit the overall implementation. As outlined in the protocol:

> The government of any country which makes use of the services of a recruiting agency, directly or otherwise, shall develop and maintain a quality assurance system to ensure adherence to this Protocol and fair labour practices. The recruiting countries should ensure compliance. Where agencies do not adhere, they will be removed from the list of approved agencies (Commonwealth Secretariat, 2004: para. 3.7).

And:

> The recruiting agency has an obligation to contact the intended source country in advance, and notify it of the agency's intentions. Recruiting countries will inform recruiting agencies of this obligation. Recruiting countries should inform source countries of any organised recruitment of teachers (Commonwealth Secretariat, 2004: para. 3.8).

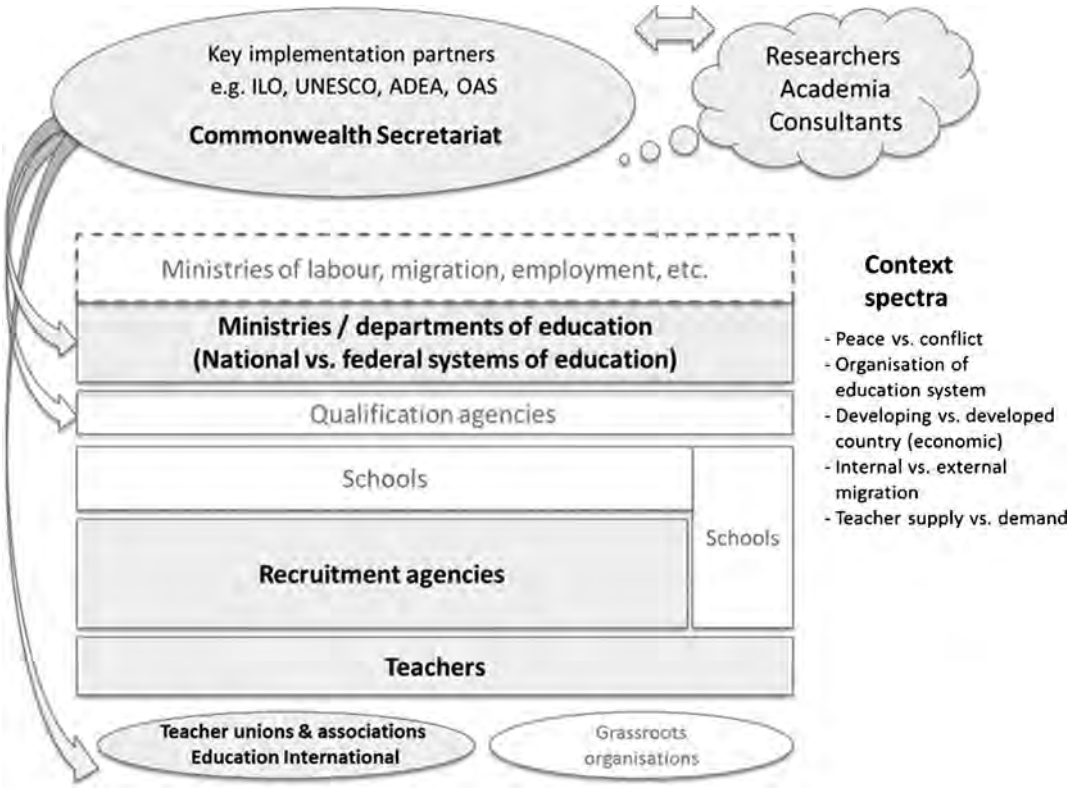
4.3 The system of teacher mobility

Given the importance of recruitment and qualifications organisations in the overall migration and recruitment process, and the evidence suggesting a continued lack of awareness of the protocol among teachers, this section revisits the implementation of the protocol from a systems perspective. As Levin points out:

> the [research-practice] relationship is a complicated one that typically proceeds slowly in fits and starts as the implications of research become clearer, and as practice settings find those implications to be meaningful and feasible – or not! (2009: 528).

As reflected in the methodology of the 2008–2009 review, the main agents in the implementation of the protocol were identified as: ministries (or departments) of education; civil society organisations and partner institutions (e.g. teacher unions and associations); teacher recruiters; the Commonwealth Secretariat; and the teachers themselves. In exploring these dimensions, however, additional stakeholders were

Figure 4.1 System of teacher mobility: recruitment and migration



identified that were important to understanding the overall system of protocol implementation. These included: researchers (including academics, consultants and independent researchers); other government ministries at the national and local level (such as ministries in charge of labour, migration and employment); qualification agencies; schools; and grassroots organisations (which are distinct from unions or international civil society organisations) (see Figure 4.1).

4.4 Protocol dissemination

The review of the implementation found significant evidence of collaboration between the Commonwealth Secretariat and its partners in 'advocating the promotion and advancement of the Protocol and its implementation' (Ochs and Jackson, 2009: 51), including unions (e.g. the All Indian Federation of Teachers' Organisations [India], American Federation of Teachers [US], National Education Association [US], National Union of Teachers [UK]), Education International, international organisations (e.g. Association for the Development of Education in Africa, ILO, UNESCO, Organization of American States [OAS]) and consortia and researchers (e.g. Commonwealth Consortium for Education, Commonwealth Policy Studies Unit). The work of many of these organisations extends to countries beyond the Commonwealth, but in doing so they represent countries in which Commonwealth teachers are working (e.g. United States, Cuba etc.).

The work of the South African Qualifications Authority (SAQA) as a partner is notable on two levels. In the context of the implementation of the protocol, SAQA might be considered as research partner, as it undertook a series of studies for the Commonwealth Secretariat, including a cross-national comparison of teaching qualifications across the Commonwealth (Morrow and Keevy, 2006; Keevy and Jansen, 2010). Therefore, SAQA's role arguably differed from that of other qualification agencies in the system of teacher mobility, given that its role was not solely in the screening and evaluation of qualifications of foreign teachers. This point will be addressed in more detail in the next section.

4.5 Revisiting protocol dissemination and implementation

In implementing the protocol, the Commonwealth Secretariat worked with its partners (and in particular the Association for the Development of Education in Africa in the translation of the protocol into French and Portuguese) to disseminate the protocol widely to ministries/departments of education across the Commonwealth, as well as to teacher unions both directly and in partnership with Education International. Key implementation partners (e.g. ILO, UNESCO, OAS etc.) also facilitated distributing the protocol within their networks, through meetings and presentations that included working groups, high-level consultations and academic conferences. A series of research symposia, convened by the Commonwealth Secretariat and its partners, also served to disseminate research into teacher migration with a view towards informing further implementation of the protocol.

The 2008–2009 review of the protocol implementation examined the role of the main actors (indicated in grey in Figure 4.1) that are ultimately involved in the system of teacher mobility, including both recruitment and migration. It is notable that school administrators were not included in the review, although schools arguably play an essential role in the overall implementation. The lack of awareness of the protocol among teachers, which was again confirmed in the 2011 follow-up research, suggests that the dissemination and the protocol could be improved. This section revisits and analyses the system of teacher mobility with a closer look at the additional actors, with a view towards informing future approaches to implementing the protocol itself and the underlying principles within the document.

4.5.1 Teachers

Ultimately, teachers have the right to migrate internationally on a temporary or permanent basis. Successful implementation, therefore, means that teachers are aware of their rights and responsibilities, and ultimately also have a system of recourse (e.g. through a union or their school) should there be exploitation. In addition to being aware of the protocol, teachers need to know how to act in line with the principles. As an example, and informed by the 2008–2009 study, Ochs (2010: 6) suggested a list of ten questions that teachers could ask themselves *before* teaching abroad, which reflect the principles outlined in the protocol:

1) *Who is telling you about the opportunity to teach overseas?*
2) *Do you know the expectations of your employer in the recruiting country before departure?*
3) *Are qualifications assessed before departure and/or arrival?*
4) *Do you have a written employment contract prior to departure?*
5) *Are your terms and conditions of employment consistent with teachers who are nationals of similar status?*
6) *Will you work under the labour laws and rules of the recruiting country?*
7) *Do you have a complaints mechanism in the recruiting country?*
8) *Do you anticipate returning home?*
9) *Have you looked at the total cost of teaching abroad?*
10) *In addition to posts at schools overseas, are there other opportunities to consider for short-term professional development (e.g. teacher-to-teacher exchanges, critical subject exchange)?*

Arguably, further work could be carried out to develop a toolkit for teachers and stakeholders to educate them about practical steps to take to know their rights, make informed decisions about teaching elsewhere and act responsibly to secure their rights in their position of employment.

4.5.2 Teacher unions and associations

Teacher unions play a strong role in providing resources to and securing the rights of all teachers, including migrant teachers, in countries where teachers can unionise. As an example in the United States, in 2010 the American Federation of Teachers (AFT) and Louisiana Federation of Teachers jointly filed a lawsuit to secure proper compensation for migrant teachers who had been recruited by an unethical agency (AFT, undated).

In 2010, Education International (EI) announced its development of a Teacher Migration and Mobility Campaign and the creation of a task force to spearhead the initiative, which includes the creation of a global network of migrant teachers using the EI website (Sinyolo, 2010). If marketed to and used effectively by teachers, such an online network has the potential to empower and connect teachers and ultimately promote decent working conditions.

4.5.3 Grassroots organisations

Teachers' connections to each other and the schools where they work are important to the implementation of the protocol, as ultimately teachers themselves determine the quality of education in the classroom. In many countries, teachers also have a multifaceted role in their community, serving as a resource to parents and community members, taking on a pastoral role in the community or sometimes working closely with health organisations. Engaging local, grassroots organisations in the implementation of the protocol is arguably important both to raise awareness among teachers and further mobilise and support teachers to spread awareness of their rights and responsibilities further.

4.5.4 Recruitment agencies

When recruitment agencies are involved in the migration process, they may often play a key role in selling the placement and opportunity to teach, helping to secure visas for the teacher, providing orientation and addressing any problems that might arise when there is a failed placement (i.e. the teacher does not stay for the full term of employment). In the 2008–2009 study, which was one of the first to explore the role of cross-national recruitment agencies in the migration process, the majority of agencies were unaware of the protocol. Given their role at different states in the recruitment and placement process, recruitment agencies could potentially be good partners in the implementation process if their business needs are aligned with international education policy objectives. The successful placement of teachers in schools is a shared interest of both policy-makers and recruiters, which ultimately results in the recruitment fee paid to the agencies. However, the education of recruitment agencies is also necessary, particularly with regards to complaints mechanisms for teachers and issues that might relate to the tax status of the foreign teacher.

4.5.5 Schools

In some cases, schools engage directly in the recruitment of overseas-trained teachers. Paths to obtaining further qualifications (e.g. qualified teacher status) or further professional development are often determined by school administrators, as they relate to their budgets and plans for staffing and training. As factors important to the teacher's personal decision-making process, schools are also important to the implementation of the protocol.

4.5.6 Qualification agencies

Both the lack of cross-national comparability and lack of equivalency of teaching qualifications remain obstacles to the successful recruitment and placement of teachers (Keevy and Jansen, 2010). Historically – and arguably currently – the limited recognition of teaching qualifications obtained in sending developing countries by receiving (and usually more developed) countries poses challenges for the teacher seeking employment abroad and the school in making a successful placement. Yet, qualification agencies play a key role in screening a teacher's qualification and ultimately making the placement.

Without international standards in comparability and equivalency, brain waste can be one outcome – when an experienced teacher is given a position that does not make use of the teacher's skills or prior experience. While the South African Qualifications Agency (SAQA) has carried out pioneering research in this area on the issue of Commonwealth teacher migration, working towards developing wider comparability frameworks, much work has yet to be done on the global landscape. Efforts in Europe to harmonise higher education qualifications (e.g. bachelor's and master's degrees), with the Bologna Process, might serve as an example that could be applied in streamlining teacher qualifications.

4.5.7 Government ministries

The review of the implementation of the protocol noted that ministries and government bodies beyond the ministry of education were intimately involved in the system of teacher mobility. In particular, those responsible for changing immigration laws, including asylum laws in some countries, played a key role in determining teacher migration flows. In addition, changing administrations and election cycles can result in a loss of institutional memory; while one administration might be aware of the protocol, it cannot be assumed that the knowledge will carry on to the next administration. Thus, the political process itself – at the national, regional and local levels – can challenge effective implementation.

4.5.8 International organisations

As evidenced in the review, international organisations served as key partners for the Commonwealth Secretariat, and indeed individual country ministries, in the implementation of the protocol in the form of joint meetings, formation of working groups and research symposia. The Commonwealth Teacher Recruitment Protocol itself has served as a model document for work towards a Continental Teacher Recruitment Protocol in Africa. However, proceeding down the path from policy discourse to policy implementation requires careful consideration of the surroundings – the context in which the policy will be adopted and implemented.

4.6 The central importance of context

As the 2008–2009 study revealed, the implementation of the protocol varied significantly across the Commonwealth member states; fundamentally, context is central. Some of the implementation partners of the Commonwealth Secretariat made the distinction between the protocol itself and the principles and good practices reflected in the protocol. The implication is that context may very well determine necessary language and implementation strategies. As a starting point, it could be said that there are five fundamental contextual factors to consider in implementation, each of which reflects a spectrum: (1) organisation of education system; (2) teacher supply vs. teacher demand; (3) developing vs. developed country (economic, social, political); (4) peace vs. conflict/disaster vs. post-conflict/disaster; and (5) internal vs. external mobility. Beyond these five, which might be seen as a basis for an analysis, a variety of other contextual factors needs to be considered, such as the state of the labour market, migration regulations and the presence of same country nationals in overseas destinations.

4.6.1 Organisation of education system

Although all Commonwealth member states formally adopted the Commonwealth Teacher Recruitment Protocol, it cannot be assumed that all systems of education were represented equally. This is the challenge of implementing policy in countries where education is organised federally, such as in India, Canada or the United States; one nation does not equal one system of education. As such, implementation needs to be considered for each state/provincial system within the federal system, and the level of co-ordination that can be expected.

4.6.2 Teacher supply vs. teacher demand

The gap between teacher supply and teacher demand ultimately drives recruitment or, in the case of India and Kenya for example, the export of teachers. A serious challenge emerges when teachers opt to leave countries where there are already teacher shortages, in particular in small states where teacher exodus (loss) will have a greater impact because it represents a proportionately larger loss (due to the difficulty in replacing staff). A serious problem that exists in many countries is the lack of fundamental data on teacher supply, demand and attrition – which might be due to retirement, death or leaving the profession. Recommendations at the national and international levels have called for improved methods and procedures for data collection, monitoring and sharing, as yet with few concrete results.

4.6.3 Peace vs. conflict/disaster vs. post-conflict/disaster

Conflict and/or disaster in either a sending and/or receiving country impacts teacher migration patterns, including the movement of refugee teachers. Evidence also suggested new trends in recruitment patterns. In 2009, recruitment agencies reported the movement of teachers to the Middle East, who might have opted for the UK or Canada a few years earlier, following the lure of excellent compensation. However, the very different Middle Eastern landscape in 2011 has inevitably prompted some recruited teachers to consider returning home and/or teachers' individual evaluations of taking up a position in some of the countries that have been affected by recent unrest. Following the South Asian tsunami in 2004, migrant teachers working in the Maldives returned to their homes. In recent years, areas of South Africa have become destinations for Zimbabwean teachers who chose to leave their home country in search of other opportunities (Manik, 2011). Yet, a placement for the teachers is not a guarantee upon arrival. Thus, the implementation of the protocol and principles within it needs to take into account the spectrum of peace, conflict and personal security, which might also influence the teacher's plans with respect to duration of stay.

4.6.4 Developing vs. developed country

The level of economic development of the country is essential to consider. This affects the working conditions, as well as the purchasing power of the teacher with respect to salary. Another dimension that is relevant to migrant teachers is the value of the currency, particularly for those who plan to remit money to support those at home.

4.6.5 Internal vs. external mobility

Although the focus of the protocol is on cross-national teacher migration and recruitment, the movement of teachers across regions, cities and even schools must also be considered. In some countries, for example where education systems are federally organised, it is difficult to move to a different region or state to teach. This can exacerbate the urban–rural gap in teacher supply. Research evidence suggests that many countries do not track or maintain data on internal mobility, which might include attrition and reasons for leaving the profession altogether. Such issues affect supply and demand, as well as teachers' choices actively to seek positions elsewhere.

4.7 Discussion and conclusions

This paper set out to revisit the review of the implementation of the Commonwealth Teacher Recruitment Protocol, which was carried out in 2008–2009, with a view towards analysing the system of teacher mobility, actors within the system and the wider context, in order to inform the future implementation of the protocol. Research that followed up with teachers in the 2008–2009 study confirmed that teachers remain largely unaware of the protocol and that recruitment agencies are key actors in communicating both opportunities to teach elsewhere and in placing teachers in their new jobs. Upstream dialogue should go beyond the national level, extending to the local level and involving all the relevant stakeholders. The role of all actors within the system should also be

considered, both with respect to current collaborative efforts and potential new efforts that could support a more effective implementation.

4.8 Recommendations

- Further research could explore which countries use qualification agencies and/or recruitment agencies, and the process of their involvement. Although research confirms the important role of recruitment agencies in the migration story, more information is needed to understand their specific actions, the context of those actions and how these agencies might actively participate as stakeholders in the ethical migration and recruitment of teachers.
- Further research could also explore reasons for migration, including post-conflict/disaster situations, to inform the development of policy options.
- While the issue of the comparability of qualifications is an important one in the policy landscape, it is important to remember that teaching qualifications and teaching quality are not always synonymous. Also, in the developing country context, there are many unqualified teachers providing instruction. Further research could explore the true meaning of qualification with regard to educational quality, for traditional routes and alternative routes to teaching.

Notes

1 The low uptake rate for the questionnaires, and the consequent potential impact on the validity of the findings of the survey due to sample size and selection bias, is noted.

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5. A continental teacher recruitment protocol in Africa: Key considerations from the Commonwealth Teacher Recruitment Protocol

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Abstract

The recent review of the impact of the Commonwealth Teacher Recruitment Protocol (CTRP) by Ochs and Jackson (2009) has pointed out that the active international recruitment of teachers is a global issue that is not limited to Commonwealth countries. The review also found that, despite the recognition of the protocol, particularly at the 'highest international level', the majority of Commonwealth teachers remain uninformed and, as a result, are open to exploitation and unfair labour practices. This paper draws on the literature identifying the challenges and lessons in implementing the CTRP to initiate and explore the important debate on the development of a continental teacher mobility protocol for Africa. Taking note that the development of a recruitment protocol for Africa has recently been initiated by the African Union (Kaluba, 2010), this paper argues for the consideration of key issues to ensure that the recruitment protocol is uniquely African and addresses the unique challenges of the recruitment of teachers in Africa. The key issues include consideration of: the African identity, which is constituted by both geographical and cultural criteria, as well as rethinking the indigenised African situation beyond the confines of Eurocentric concepts and categories (Higgs and Keevy, 2009); moving from 'policy borrowing' to 'policy learning' as the mobility protocol is developed (Chakroun, 2010); gathering accurate data on teacher recruitment in Africa to inform the mobility protocol; recognising qualifications through qualifications frameworks in Africa (Samuels and Keevy, 2008); and increasing the professionalisation of teachers in Africa (Ochs, 2011).

Key words
Teacher, Recruitment, Migration, Commonwealth, Africa

5.1 Introduction[1]

Teacher migration is recognised as an increasing global phenomenon, including on the African continent. As was emphasised in the Symposium Statement of the Fifth Commonwealth Teachers' Research Symposium held in South Africa in 2010, 'many countries across the globe face severe current and future shortages and changes in teacher supply and demand' (Ochs, 2011: 5). This stark fact is confirmed by the recent review of the global demand for primary teachers conducted by the UNESCO Institute for Statistics (UIS, 2010), which finds that to replace teachers leaving the profession, 7.2 million new teachers are needed globally between 2008 and 2015. Among 99 countries that need to expand their teaching forces, 5.5 million teachers need to be recruited to cover not only 1.9 million additional posts to reach universal primary education (UPE), but also 3.6 million teachers in order to fill the posts of teachers leaving the profession (assuming an annual attrition rate of 5 per cent). According to the UIS, sub-Saharan African countries alone will need to recruit more than 2 million teachers in total to maintain today's teaching force and to make the extra effort to meet UPE. In North America and Western Europe, countries will need to replace about 1 million of today's teachers.

In order to address these shortages many countries are actively recruiting teachers, in many cases from more vulnerable small and developing states, either through bilateral

processes or by using recruitment agencies. While the migration of teachers, just as has been the case particularly with professionals in nursing (see Commonwealth Secretariat, 2005), remains the right of the individual and accepted in the increasingly globalised world, there is an enormous price to be paid by sending countries. These countries invest vast amounts in pre-service training that can last anything between 2.6 to 3.8 years for primary teachers and 2.9 to 4.1 years for secondary teachers in Commonwealth countries (Keevy and Jansen, 2010). Another important factor to consider is the potential exploitation of teachers in recruiting countries, more so when the recruitment takes place without governmental oversight.

For the 54 Commonwealth countries, the challenges associated with teacher migration were recognised in 2002, mainly in reaction to teacher loss experienced in the Caribbean region, and a Commonwealth Teacher Recruitment Protocol was adopted in 2004 (Commonwealth Secretariat, 2004). The key purpose of the Commonwealth Teacher Recruitment Protocol has been to:

> … balance the right of teachers to migrate internationally, on a temporary or permanent basis, against the need to protect the integrity of national education systems and to prevent the exploitation of the scarce human resources of poor counties. The Protocol also seeks to safeguard the rights of recruited teachers and the conditions relating to their service in the recruiting country (Commonwealth Secretariat, 2004: 7).

Although the Commonwealth Teacher Recruitment Protocol is not a legally enforceable agreement, Commonwealth member countries have been encouraged to develop supporting national policies and strategies that will contribute to the implementation of the protocol. Included in the 54 Commonwealth member states are 18 African countries, some of which actively participated in the development of the Commonwealth Teacher Recruitment Protocol – namely Lesotho, Mauritius, Nigeria, Seychelles, South Africa and Zambia. Taking note of the contribution of the Commonwealth Teacher Recruitment Protocol within the Commonwealth context, and recognising that African countries beyond those that are Commonwealth members were experiencing difficulties in managing teacher migration, the African Union initiated the development of a draft Continental Teacher Recruitment Protocol in Africa at the end of 2009 (Kaluba, 2010). The envisaged purpose of the African Protocol would be to:

> … protect national education systems from unchecked teachers in terms of technical eligibility, previous professional registration status and recognition of teacher qualifications. It aims to protect [African] member states from unethical teacher recruitment practices by recruiting agencies (Kaluba, 2010: 46).

This paper draws on the challenges and lessons identified from the review of the Commonwealth Teacher Recruitment Protocol (Ochs and Jackson, 2009), including also the specific work on the comparability of teacher qualifications (Morrow and Keevy, 2006; Keevy and Jansen, 2010), while also considering the deliberations that took place at the five previous Commonwealth teacher research symposia. In particular, the paper is concerned with the extent to which the proposed Continental Teacher Recruitment Protocol in Africa is a policy borrowed from the Commonwealth, as opposed to a policy that may include lessons from elsewhere, but remains an African instrument to address an African problem. In effect this paper questions whether the development of a Continental Teacher Recruitment Protocol in Africa is the best way in which to protect national education systems and member states from unethical teacher recruitment practices.

5.2 Learning from the experiences of the Commonwealth Teacher Recruitment Protocol

Before considering the relevance and nature of the proposed Continental Teacher Recruitment Protocol in Africa, it is necessary to first consider the lessons associated with

the implementation of the Commonwealth Teacher Recruitment Protocol between 2004 and 2009. In this regard the following key observations stand out.

First, there is the importance of context: as noted by Ochs and Jackson (2009: x) in their review of the implementation of the Commonwealth Teacher Recruitment Protocol 'a central factor in the implementation of the [Commonwealth] Protocol was the issue of context'. Referring to examples such as national social and security policy, migration legislation, organisation of education systems and unregulated industries, Ochs and Jackson make the point that context impacts directly on the scale and nature of teacher recruitment. Second, it is apparent that the Commonwealth Teacher Recruitment Protocol had achieved relatively low levels of awareness among key stakeholders, including teachers. In their study, Ochs and Jackson found that 82.5 per cent of interviewees were completely unaware of the protocol. Another important finding from the review was that countries, in particular ministries of education, were not capturing data on teacher movement, recruiting agencies and recruited teachers.

Many of the findings of the Ochs and Jackson study were confirmed in a complementary study conducted by Keevy and Jansen (2010) focusing on the transferability of teacher qualifications in the Commonwealth. The findings confirmed the limited data on foreign teachers, as well as that agreeing with Ochs and Jackson's observation that 'the issue of qualifications and comparability of qualifications remains a challenge to the effective deployment of teachers' (Ochs and Jackson, 2009: 74). Keevy and Jansen's study also found that the teacher qualifications in each country varied based on the context of each:

> The unique context of each country located within its specific historical trajectory will, over years, have contributed to significant interventions and approaches to qualifications design and professional regulation of the teacher profession. This critical factor needs to be borne in mind as comparisons are drawn across participating [Commonwealth] countries (Keevy and Jansen, 2010: 49).

Jansen (in Ochs, 2011: 13) makes a similar point about context, although referring specifically to our understanding of qualifications and the manner in which teaching and learning takes place when he asks: 'what does it mean to talk about qualifications when you are blind to context?' The importance of context is also supported by Spreen (in Ochs, 2011: 15), who states that 'we have big problems to fix that have a lot to do with inequality and social justice around educational outcomes… we cannot just ignore those things in thinking about how we qualify and certify'.

Table 5.1 gives an overview of the main initial teacher qualifications offered across the 35 participating Commonwealth countries. The Keevy and Jansen study notes that, largely due to the Commonwealth legacy in these countries, there are also some commonalities for example with regard to the level and duration of qualifications, the qualification types and,

Table 5.1 Qualifications across participating countries

Qualification type	Qualification	Average duration (years, full-time equivalent)	Average practical component (weeks)	Percentage of countries that offer the qualification
Academic	Bachelor Degree	3.43	0.71	60
Professional	Diploma in Education	2.07	15.2	46
	Certificate in Education	2.08	11.5	46
	Bachelor Degree in Education	3.57	15.8	74
	Graduate Diploma in Education	1.20	10.2	14
	Associate Degree in Education	2.13	12.5	14
	Postgraduate Diploma in Education	1.00	9.5	17
	Postgraduate Certificate in Education	1.9	16.5	9

Source: adapted from Keevy and Jansen, 2010.

importantly, also a common weakness across the countries when it comes to professional requirements (only eight of the 35 participating Commonwealth countries were found to be enforcing comprehensive professional requirements).

In considering the preliminary findings of both the Ochs and Jackson (2009) and Keevy and Jansen (2010) studies, the Commonwealth Steering Committee on Teacher Qualifications and Professional Recognition, which met at Stoke Rochford Hall, Lincolnshire, United Kingdom, on 8 April 2009, made several recommendations. Among others, it was recommended that the Commonwealth Teacher Recruitment Protocol be extended to provide for the right of safe passage and return to the country of origin of teachers when the recruiting country becomes engaged in conflict. It was also emphasised that existing data management systems should be strengthened. Ministers were urged to support efforts to advocate and disseminate the Commonwealth Teacher Recruitment Protocol, particularly among teachers and teacher organisations. Guidelines to support the design of induction and orientation courses were proposed. In an attempt to strengthen the implementation of the protocol, the Steering Committee supported the Ochs and Jackson proposal for the establishment of a dedicated unit as a:

> … mechanism to address the non-adherence of countries, teachers, recruitment agencies and ministries as well as to share good practices within and beyond the teaching profession (Ochs and Jackson, 2009: xi).

Ministries of education were also encouraged to identify a focal point to deal with all matters relating to the Commonwealth Teacher Recruitment Protocol. The Commonwealth Secretariat was encouraged to bring its comparative advantage concerning the protocol to the global discourse, including to the Task Force on Teachers established by UNESCO. With regard to the study on qualifications, the Steering Committee (later renamed as the Working Group on Teacher Recruitment) proposed that the comparability table of initial teacher qualifications be updated and reviewed on a regular basis in order to make longitudinal and updated data on teacher qualifications available to member states. The committee also proposed that the development of professional competency standards for Commonwealth teachers be seriously considered, including the active collaboration of teaching councils (Keevy and Jansen, 2010).

In June 2010, a Commonwealth Advisory Council on Teacher Mobility, Recruitment and Migration was established to provide guidance and advice to the Commonwealth Secretariat on the monitoring and implementation of the Commonwealth Teacher Recruitment Protocol. The Advisory Council supported the earlier proposals that a strategy was necessary to raise awareness of the protocol through the proposed focal points, and that more needed to be done to strengthen the information base on teacher mobility and migration. The council also proposed that examples of good practice be distilled and, importantly, that strategies be explored to 'model legislation' for operationalising the protocol in source and recruiting countries. Other important recommendations of the council included a call to countries to create, expedite and report on effective implementation of a regulatory framework for recruiters and recruiting agencies in accordance with the provisions of the Commonwealth Teacher Recruitment Protocol and relevant international standards. A consideration of the feasibility of a Commonwealth and/or global quality standard of agencies that agree to and conduct their business in accordance with the principles of the Commonwealth Teacher Recruitment Protocol was suggested. Governments were encouraged to collaborate with teacher organisations in the implementation of the Commonwealth Teacher Recruitment Protocol, and also to engage in bilateral/multilateral agreements on teacher migration as it relates to the Commonwealth Teacher Recruitment Protocol. Lastly, the council proposed the development of professional teacher standards through mutually agreed qualifications frameworks, in accordance with the provisions of the Commonwealth Teacher Recruitment Protocol to encourage cross-border recognition and transferability of teacher qualifications and the professional registration of teachers (Degazon-Johnson, 2010b).

Reflecting on the experiences that relate to the implementation of the Commonwealth Teacher Recruitment Protocol as outlined above, the following key observations stand out and may be considered during the development of the proposed Continental Teacher Recruitment Protocol for Africa:

- *Context matters*. Context impacts on the scale and nature of teacher recruitment, the recognition and comparability of teacher qualifications, as well as the extent to which the teaching profession is regulated. In the case of teacher qualifications, it is evident that the common English legacy shared by Commonwealth member states has resulted in several commonalities with regard to levels, duration and qualification types.
- *Professionalisation matters*. Research shows significant weaknesses across the Commonwealth in terms of the level of professionalisation, including the establishment and role of professional councils, continuing professional development and even criminal record screening.
- *Enforceability matters*. The extent to which a broad non-enforceable political agreement, such as a protocol for teacher recruitment, can be enforced by member states has clearly been a limiting factor. This is confirmed by the recommendation of the Commonwealth Advisory Council on Teacher Mobility, Recruitment and Migration for 'model legislation' to be developed to operationalise the protocol, as well as the call on countries to create regulatory frameworks for teacher recruitment.
- *Advocacy matters*. Closely linked to the point on enforceability, it is recognised that a protocol of this nature, one that is not enforceable, requires strong and continuing advocacy to improve awareness, not only with ministries but also with the teachers themselves.
- *Collaboration matters*. The process of developing the CTRP is exemplary in the extent to which it has been able to draw on different levels and experiences from member states. Through the establishment of interim committees to oversee the protocol, to the ongoing involvement of senior government officials, including regular reporting to the ministers of education through the Conference of Commonwealth Education Ministers (CCEM), there has been a continued emphasis on collaboration. An area identified as a weakness has been the limited extent to which teacher professional and employment organisations and recruitment agencies have been involved.
- *Data matter*. The Commonwealth experience clearly shows that data on teacher migration and recruitment are limited at best and that data management systems require strengthening.
- *Oversight matters*. The role of the Commonwealth Secretariat, the now disbanded Steering Committee on Teacher Qualifications and Professional Registration and the recently established Commonwealth Advisory Council on Teacher Mobility, Recruitment and Migration, cannot be underestimated. The additional call for a 'dedicated unit' to monitor non-adherence, as well as the identification of country focal points, all point towards the need for strong and effective oversight mechanisms, more so in the African context where many countries do not have the capacity to effectively monitor teacher supply and demand.

5.3 The meaning of an African approach: policy learning and an African philosophy

We could go ahead and apply the learning experiences of the Commonwealth Teacher Recruitment Protocol, as identified in the section above, to the proposed Continental Teacher Recruitment Protocol in Africa. This learning will undoubtedly be of great value and will strengthen the African Protocol right at its point of conception. The problem is that such application would sidestep the most important aspect of the proposed African protocol, namely what makes the protocol African? Stated differently, we may ask: How can a policy borrowed from the Commonwealth be effective in the African context? A

distinction between policy borrowing, ranging from reforms that are imposed to those that are voluntarily sought or accepted, and policy learning that 'puts a strong emphasis on the development of national capacities to lead the design and implementation of… reforms' (Chakroun, 2010: 204) provides a basis for responding to this question.

It is useful to consider the development of the Continental Teacher Recruitment Protocol in Africa as a policy-learning activity, and draw on a study by Chakroun (2010) on policy learning in the context of national qualifications frameworks. In the study he suggests that two dimensions of policy learning need to be considered: i) individual learning that emphasises participation in peer learning and contribution to policy-making processes, based on the assumption that involvement in policy learning increases the expertise of the individual policy-makers; and ii) organisational learning through which individual learning can be channelled to generate and sustain changes at the wider institutional level. An important emphasis is placed on learning from one's own experiences and through peer learning, as opposed to the direct importation of best practice from elsewhere:

> [Peer learning] focuses on the capacity of policy-makers in specific countries to learn from their own experience and from that of other countries in ways that strive for a deeper understanding of policy problems and processes than what is provided by simply seeking and implementing best practice (Chakroun, 2010: 205).

A number of useful considerations come to the fore if we follow the application of the policy-learning model to the development and implementation of national qualifications frameworks as outlined by Chakroun (*ibid.*). The following observations stand out:

- The involvement of social partners and other stakeholders is important and greatly improves contextual specificity. The reluctance of social partners to become involved in some parts of the world, such as the Mediterranean region, as opposed to the widespread involvement in other parts, such as in the broader European context, needs to be considered.
- Reference to sources of best practice (in Chakroun's example this is the European Qualifications Framework, while in the context of this paper it is the Commonwealth Teacher Recruitment Protocol), while pragmatic and understandable, has several potential negative consequences. This approach limits the extent to which countries are able to preserve the coherence and integrity of national systems, as well as the extent to which stakeholders are able to discuss and understand specific national contexts and problems. This, in turn, reduces the understanding, leadership and ownership of the policy itself.
- Technical assistance often leads to the development of literature that is not embedded in national contexts, more so in countries where limited available resources restrict policy autonomy. It is apparent that the donor community has become accustomed to this approach and it may be difficult to change existing practices.

Considering the importance of policy learning, also in the development of the Continental Teacher Recruitment Protocol in Africa, it is necessary to carefully consider what meaning we attach to the adjective 'African'. As pointed out by Higgs and Keevy (2009), African philosophy can be based on both geographical and cultural criteria: some authors, such as Mudimbe (1988) and Hountondji (1985) regard an intellectual product as African simply because it is produced or promoted by Africans; in the case of the cultural criterion, authors such as Gyekye (1996) regard an intellectual product as African if it directs attention to issues concerning the theoretical of conceptual underpinning of African culture. Higgs and Keevy (2009: 692) suggest a 'both/and' approach that avoids the preoccupation with definitions:

> In citing these two polarised views as to what constitutes being 'African', we would like to suggest that a distinctively African identity is not constituted by either/or, but rather by both/and. That is, both geographical and cultural factors constitute an African identity in that these factors are necessary constituents of the experience of

> being 'African', and therefore also of understanding what could be an 'African philosophy'.

Central to the issue of philosophy in Africa is the question of relevance and usefulness, and the ability to contribute to political, economic, ethical and general upliftment. Pragmatism and the ability to render a 'service' are also important, as well as effective contribution to the amelioration of the lived and existing human condition. The deconstruction of the colonial discourse and the demise of European hegemony that requires us to rethink the African situation beyond the confines of Eurocentric concepts and categories (Serequeberhan, 1994) is another important factor, although this does not preclude us from relating Africa to its external community, including the West and Europe. Hountondji (2002: 139) describes the space wherein critical discussion and reflection on African issues can take place as follows:

> … an autonomous space where the themes explored would no longer be a distant echo of those developed by Western knowledge, but the direct or indirect expression of Africa's own preoccupations.

Higgs and Keevy (2009: 699) stated that 'Qualifications frameworks in Africa should not be a reflection of Europe in Africa'. Applying this to the Commonwealth Teacher Recruitment Protocol, it may be fair to argue that the Continental Teacher Recruitment Protocol in Africa should not be a reflection of the Commonwealth in Africa.

5.4 Thoughts on the proposed African Continental Teacher Recruitment Protocol

In the introduction to this paper the question was raised: is the development of a Continental Teacher Recruitment Protocol in Africa the best way in which to protect national education systems and the member states from unethical teacher recruitment practices? Considering that the development of an African Protocol has already been initiated by the African Union (AU) (Kaluba, 2010), and taking note of the key learnings experienced from the Commonwealth Teacher Recruitment Protocol, as well as the cautionary notes against policy borrowing and the need for a truly African instrument, there are two concerns that come to the fore.

First, it is not entirely clear whether an Africa teacher recruitment protocol will be able to enhance quality considering the huge disparities both in terms of teacher qualifications and conditions of service. This is highlighted by the following statistics:

- Mali: 44 per cent of primary school teachers are unqualified, most teachers are trained for 90 days, the pupil-teacher ratio is 54:1 (Sinyolo in Degazon-Johnson, 2010a)
- Uganda: 14 per cent of teachers are unqualified, the pupil-teacher ratio is 90:1 in the north (Sinyolo in Degazon-Johnson, 2010a)
- Liberia: this is a post-conflict country, 40 per cent of teachers are trained, low teacher salaries (US$70–81 per month) (Sinyolo in Degazon-Johnson, 2010a)
- Namibia: 92 per cent of teachers in the capital are qualified, while only 40 per cent in the rural north are qualified (Ratterree in Degazon-Johnson, 2010a)
- South Africa: 89 per cent of teachers have a professional teaching qualification (Parker in Ochs, 2011)

Primary teacher recruitment trends across the world show that recruitment needs in sub-Saharan Africa are very high compared to the rest of the world, and are largely driven by the need for primary teachers required to meet the goals of universal primary education (see Table 5.2).

Considering the paucity of data on teacher recruitment, as has been previously mentioned in this paper, and possibly more so in the case of Africa, the recruitment trends in isolation do not provide sufficient evidence that the protection of national education systems and

Table 5.2 Regional figures: global demand for primary teachers

Region	Stock in 2008 (000s)	Teachers needed in 2015 (000s)	Absolute change in stock (000s)
Arab States	1,899	2,148	250
Central and Eastern Europe	1,122	1,123	1
Central Asia	330	328	−2
East Asia and Pacific	10,119	8,723	−1,396
Latin America/Caribbean	2,919	2,542	−376
North America/West Europe	3,727	3,810	84
South and West Asia	4,970	4,836	−134
Sub-Saharan Africa	2,835	3,851	1,017
World	27,920	27,363	−558

Source: UNESCO Institute for Statistics, 2010.

unethical teacher recruitment practices is a problem in Africa. In order to make an informed decision on this matter, it is proposed that cross-border teacher migration in Africa is first scrutinised to determine the existing challenges and trends. To assume that the challenges experienced in the Commonwealth, mainly in response to teacher loss in small states, is necessarily the case throughout Africa, has to be tested. If this were the case, the call for a continental instrument would have been made earlier and with much more urgency. It may also be prudent to draw on the experiences of the 18 African countries that are Commonwealth member states, while also representing the different regional economic communities in Africa, and then expanding the research to other countries. In this regard, Kenya stands out as one of only a handful of countries across the world that deliberately produces a greater number of teachers than it needs in order to benefit from remittances, and that undoubtedly has wide experience in the field of recruitment practices. On the other hand, teachers in Rwanda and the Democratic Republic of Congo have migrated as a result of conflict in their countries; Zimbabwean teachers seek work in South Africa; and teachers in Uganda move from the state to the private sector, not because wages are higher but because standards are.

The second concern is that if there is sufficient evidence and consensus that Africa may indeed benefit from a teacher recruitment protocol, then we need to be very careful how we go about its development. As pointed out by Chakroun (2010) and Higgs and Keevy (2009) in the previous section, there are several pitfalls to avoid when learning from best practices from other contexts. At this stage it is not evident that the African Union has approached the development of the proposed Continental Teacher Recruitment Protocol in Africa with the necessary caution when it comes to policy learning and recognition of the African context. In particular, the homogeneity of Commonwealth countries due to the same colonial legacy, as opposed to the lack of homogeneity among African countries due to English, French, Dutch, Arabic and Portuguese legacies, suggests that the African protocol cannot simply be a reflection of the Commonwealth in Africa.

The following factors may be considered during the development of the African protocol in order to avoid direct policy borrowing from the Commonwealth, while also recognising the African context:

- Regions in Africa have elements of homogeneity and function well through the regional economic communities (RECs): the Southern African Development Community, Economic Community of West African States and the Common Market for Eastern and Southern Africa. It is proposed that the RECs be supported by the AU to increase harmonisation of education systems, but also to consider the existing recruitment trends and strategies through which they are being managed.
- The involvement of social partners and other stakeholders is crucial. While it is recognised that many African countries may not have fully functional professional associations, and even where the associations exist they may be antipathetic towards

participatory policy-making processes, the majority have employment/union associations. It is proposed that these associations and a broad range of stakeholders be involved at the outset of the process.

- The growing understandings of qualifications frameworks, particularly the extent to which the frameworks are African (Keevy, 2011; Higgs and Keevy, 2009; Samuels and Keevy, 2008), can support the transferability and cross-border recognition of teacher qualifications in Africa.
- Advocacy of the proposed African protocol to teachers, ministries and other stakeholders must be taken seriously and sufficient financial and human resources from governments and development partners must be committed to this purpose.
- The extent to which the African protocol should be enforceable must be given consideration. While it is accepted that a continental initiative driven by the AU will always be voluntary, it may be sensible to consider enforceable national and REC processes, as well as bilateral and multilateral processes, at the outset that will embed the proposed protocol within national policies.
- Oversight mechanisms dedicated to the proposed African protocol should be considered. These could take the form of AU-level committees, but could also be constituted on regional levels. The inclusion of a development partner that is already active on the Continent is also an option, but this will have to be carefully managed to avoid the concerns raised by Chakroun (2010) regarding disregard for local contexts.
- Above all, the African protocol must adhere to the principles of relevance, usefulness, pragmatism, contribution to upliftment, service rendering and the amelioration of the lived and existing human condition in Africa.

5.5 Concluding comments

The development of a Continental Teacher Recruitment Protocol in Africa based on the Commonwealth Teacher Recruitment Protocol seems to be a good idea, despite the fact that the Commonwealth protocol has had limited impact and that the majority of ministries and teachers remain unaware of its existence. This is also despite the fact that significant resources have been invested into the Commonwealth process since 2004, and the considerable efforts that have been made to involve social partners and other stakeholders. Maybe it is too early to evaluate the impact of the Commonwealth protocol; maybe better advocacy, greater enforcement, better data and more effective oversight will result in a tipping point being reached with considerable impact to follow afterwards. The point is that the effectiveness of the Commonwealth protocol remains to be determined, despite its noble intentions. Should the Africa protocol reflect the Commonwealth process? Not necessarily. If, however, it becomes evident that the rights of teachers to migrate internationally need to be balanced against the need to protect the integrity of national systems and to prevent the exploitation of this scarce human resource in Africa, an African protocol may be an option. This decision will have to be based on identified challenges and trends regarding cross-border teacher migration in Africa, should take into account the principles of policy learning and, more importantly, should recognise the context as distinctively African.

Notes

1 I am indebted to Roli Degazon-Johnson, Kimberly Ochs, Jonathan Penson and Akemi Yonemura for comments on earlier drafts of this paper. The views expressed are, however, my own and I take full responsibility for any inaccuracies.

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PART II. Application of CTRP Principles: Experiences from the Field and Good Practices

6. Managing teacher recruitment and migration: A case study of the Barbados experience

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Abstract

This paper seeks to highlight Barbados' experience in managing teacher recruitment and migration. As a small developing state, Barbados has been a leader in the promotion of strategies to manage teacher migration, commencing with the events surrounding the development of the Savannah Accord. Since 2001, the Government of Barbados has been guided by a policy framework on teacher recruitment and migration which was developed following the experience of the period between 1998 and 2001. During this period, a significant number of Barbadian teachers were recruited to work in the USA. Barbados also played a pivotal role in the development of the Savannah Accord in 2002 and the Commonwealth Teacher Recruitment Protocol (CTRP), which was adopted in 2004.

An examination of administrative data compiled in the Barbados Ministry of Education and Human Resource Development was conducted. The views of Barbadian teachers who have migrated were sought to facilitate the documentation of their experience. A qualitative approach using telephone and face-to-face interviews was therefore used to collect and analyse data from two former senior ministry officials, teachers and one Barbados teaching union executive. Quantitative data from the ministry's records and the Barbados Immigration Department were also analysed to investigate the migration of teachers to Barbados from other countries.

The analysis of data revealed that between 2000 and 2009 an estimated 3 to 4 per cent of trained and experienced teachers in the public service had either been granted leave to teach abroad or migrated to work in other jurisdictions. This was fairly significant given the size of the public teaching workforce in Barbados. In addition, when gender was taken into consideration, approximately two-thirds of the teachers who were recruited were females. Administrative data revealed that currently 214 non-Barbadian citizens are employed in the public service, while between 2006 and 2010, 127 teachers were granted visas to work in Barbados.

An important finding from the interviews with teachers was that a majority had no knowledge of the CTRP. Future research should focus on conducting a gap analysis on the CTRP's implementation in Barbados to determine what still needs to be done regarding dissemination of information.

Key words
Teacher Recruitment, Migration, Recruitment Policy, Managing Recruitment, Ministry of Education and Human Resource Development, Barbados

6.1 Introduction and background[1]

The recruitment and migration of teachers from developing to developed countries continue to be as much of a concern today as they were a decade ago. The global shortage of teachers poses a negative threat, as developing countries move towards improving their chances of achieving the various internationally agreed goals and targets at the national level. The UNESCO Institute for Statistics (2009) estimates that by 2015, close to 100 countries would need approximately 1.9 million more teachers compared to 2007 to satisfy

the provision of good quality universal primary education. Several countries face a very daunting task in providing adequate numbers of teachers to service the needs of children in their classrooms. A major question therefore remains: where will these teachers come from?

Many smaller developing countries are aware of the impact of previous movements by developed countries to satisfy their demand for teachers. In 2007, thousands of teachers on temporary visas were contracted to teach in the United States of America (USA). Yet it is recognised that there is a need to protect migrant workers and limit the potential impact of migration on source countries (American Federation of Teachers, 2009). These concerns are reflected in the provisions of the Commonwealth Teacher Recruitment Protocol (CTRP).

The lure for teachers from developing countries[2] to pursue more lucrative opportunities in developed countries has highlighted several major disparities. Affected areas include teacher education and preparation, remuneration and career path structures, incentives and retention strategies that give rise to international mobility, 'brain drain' and the depletion of human capital (Ochs, 2007). These factors are known to have an impact on the quality of education in source countries (Sives, Morgan and Appleton, 2005; Appleton, Sives and Morgan, 2006; Sives, Morgan, Appleton and Bremmer, 2006). This raises the important question of how source countries can derive maximum benefit from the international movement of teachers, while also developing strategies that provide mechanisms that, while facilitating international recruitment, encourage the establishment of circular mechanisms.

The Caribbean region has been well known for its high level of emigration, especially of teachers, and subsequent remittances that provide financial support for families who remain, which have been an important factor in stimulating economic growth. Jamaica particularly has been identified as one of the most severely affected source countries in the Caribbean region (Sives *et al.*, 2006). Even though the Caribbean region has certainly been affected by the international movement of human resources to developed countries, it has escaped the 'migration merry-go-round' experienced by some Commonwealth countries (Degazon-Johnson, 2008*a* and *b*).

Recent developments in New York, as reported by Best (2011), bring into focus the continued plight of teachers who migrated to developed countries in the early part of the last decade. It has been reported that New York Department of Education is contemplating reducing the size of its teaching staff by as many as 6,000 teachers. This downsizing forms part of a significant reduction in educational expenditure, which would allow the city to manage its budget deficit more effectively. At the losing end of this exercise appear to be thousands of Caribbean teachers who migrated in the wave of teachers in 2000 to fill a shortage that existed at the time.

The same report by Best highlighted a stark reminder of the negative experiences of some teachers who migrated to the USA. Again the notion of broken promises by the New York authorities has raised its head (Best, 2011; Degazon-Johnson, 2008*a*). The report revealed that concern was expressed regarding the failure by some recruiters in that city to honour their commitment to teachers, who were promised enhanced career opportunities, higher pay, better conditions of service, a chance to improve their own education and certification at colleges and universities, and securing their immigration status.

While Best reported that some teachers had improved their professional qualifications, obtained green cards, bought homes and generally improved their social and economic status since migrating to the USA, he argued that 'far too many were not so fortunate' (2011, para. 16). It is clear therefore that these experiences need to be considered if we are to chart a new path for the effective implementation of the principles of the CTRP.

The migration of teachers is likely to continue into the foreseeable future, based on the predicted increase in the global demand for teachers. There is support for developing countries, through greater awareness of the CTRP, to leverage more inputs such as

professional development and capacity building into their educations systems from developed countries (Degazon-Johnson, 2008*b*).

The 2011 Commonwealth Research Symposium therefore provides an excellent opportunity to not only share best practice experiences, but to strengthen the resolve of developing countries to ensure the protection of migrating teachers and to enforce the provisions of the CTRP.

6.2 Methodology

6.2.1 Purpose

The purpose of this paper is to highlight some of the experiences of Barbados, a small island developing state, in its management of the recruitment and migration of teachers to other jurisdictions. The paper seeks to present some limited data to support a discussion of the factors that underpin the steps taken to develop a managed process in Barbados. In addition, it seeks to share some of the experiences of a small number of Barbadians who have taken up the opportunity to serve in other countries.

6.2.2 Statement of the problem

The problem investigated focuses on the strategies deployed by the Barbados Ministry of Education to carefully control the potential loss of experienced teachers from public primary and secondary schools to developed countries. This paper has therefore undertaken to:

1. examine the administrative processes adopted by the Ministry of Education to manage the recruitment and migration of Barbadian teachers in the face of a drive by developed countries to meet the demand for teachers in their education systems; and
2. present a brief analysis to raise awareness about the experiences of teachers who have migrated to teach overseas.

6.2.3 Approach

Telephone interviews were conducted with two former senior ministry officials who were involved in the management of the teacher recruitment and migration process. To corroborate the views and experiences of these officials, administrative data were also collected and analysed. In addition, interviews were conducted with one teaching union official and ten teachers who were conveniently selected from the ministry's database.

6.2.4 Research questions

The research was guided by the following questions:

- What challenges did the Ministry of Education of Barbados face in dealing with the migration of teachers?
- What administrative procedures were used by the Ministry of Education to manage the recruitment and migration of Barbadian teachers?
- What are the views of some of the teachers on their experiences teaching overseas?
- What were the lessons learned?

6.2.5 Instrument

A semi-structured interview schedule was developed for use with ministry and union officials and a structured interview schedule was developed for teachers on the basis of the 2009 review of the research literature undertaken by Ochs and Jackson. The structured interview schedule consisted of two sections: Section 1 collected personal data and Section 2 collected data based on respondents' responses to both closed and open-ended questions. The instrument was pre-tested prior to being used to gather data from respondents. The

interview schedule was then used by the researcher to conduct telephone and face-to-face interviews with participants.

6.3 Discussion of findings

6.3.1 Early developments in managing teacher migration

Barbadian teachers, like other Caribbean nationals, have migrated in search of employment opportunities in other countries such as the United Kingdom (UK) and the USA. The interviews conducted with the former ministry officials and the union executive supported this view. The administrative records of the ministry also revealed that in the early 1990s, regional territories such as Bermuda, Turks and Caicos Islands, Cayman Islands and the Netherlands Antilles recruited Barbadian teachers.

One example of an early experience with the organised recruitment of teachers to a developed country was presented in the interview with a former senior ministry official and supported by a union executive. It was revealed that:

> In the early 1990s, the London Borough of Hackney recruited a number of Barbadian teachers who went there on secondment. However, the education authorities in the Borough of Hackney reportedly failed to honour their commitment to transfer to the Treasury of Barbados the agreed gratuity for those teachers.

This experience resulted in the Ministry of Education instituting a policy of 'no-pay leave' for public service teachers who undertook overseas teaching contracts. The administrative records of the ministry revealed that in 1992, 11 teachers were subsequently granted no-pay leave to take up teaching contracts in the Cayman Islands.

From the interviews conducted and the administrative data, it was evident that the ministry and the union supported the desire of teachers to undertake contracts to teach overseas. A typical response was that 'teachers would benefit through the acquisition of new skills, further training and professional development and postgraduate qualifications. Barbados would also benefit from remittances of foreign currency'. There was also the view that opportunities would be created for younger teachers. The ministry was reluctant to 'tie-up' established teaching posts for prolonged periods since temporary teachers would not have security of tenure.

The administrative records of the ministry showed that during the 1990s, a combination of approaches was used by recruiting countries to attract local teachers. In some instances, the ministries of education of the recruiting countries wrote to the Ministry of Education in Barbados indicating an intention to recruit teachers. For example, in 1993, the Government of the Netherlands Antilles wrote to the Ministry of Education, Barbados, seeking the release of teachers and stated: 'it was prepared to agree to any reasonable conditions under which the Government of Barbados may be willing to release teachers'.[3] In 1998, Anguilla wrote to the Ministry of Education Barbados, seeking to recruit trained teachers in five disciplines (English, mathematics, geography, social studies and Spanish).[4] The Anguillan offer for professionally trained teachers included 25 per cent gratuity of basic salary, a housing allowance of US$800 per month, and paid return passages for the teacher, spouse and up to four children under 19 years.

While the number of teachers sought by the Anguillan government was small, the request came just before the new school year, which started in September. The Barbados Ministry of Education indicated that it was too late to accommodate the request and suggested that the Anguillan government advertise in the local press.[5]

The records of the ministry revealed that over the years, concern was expressed that various regional governments were not negotiating with the Ministry of Education in the recruitment of teachers, but appeared to be communicating directly with individual teachers. This concern was confirmed in an interview with a former senior ministry official, who also noted that 'at the time the government was spending large sums of money on the training of its teachers and should be consulted'.

Some countries advertised in the local newspapers and recruited directly. For example, ministry officials from Bermuda met with ministry officials in Barbados only after advertising to recruit teachers in the local press. In other cases, some recruiters made direct contact with individual teachers.

The Ministry of Education in Barbados demonstrated some flexibility and restraint in managing the migration of teachers at the time, especially given that the numbers sought were small. Administrative data showed evidence of an intention by the Ministry of Education to formulate a policy on teacher migration in the early 1990s.

Over the years, the Ministry of Education facilitated the release of teachers, particularly in subject areas where there would not have been any adverse impact on the system. However, a wave of large-scale recruitment of Barbadian teachers to serve in New York, which started in the late 1990s, was the catalyst for urgent and strategic action on the part of the Ministry of Education to properly manage the recruitment process.

Such was the case in 2001 when approximately 38 teachers, with an average of 20 years' teaching experience, went to work in New York. More than 50 per cent of those teachers eventually resigned from their teaching posts in Barbados or refused to return to work in Barbados. This resulted in a loss of some very experienced teachers. One former ministry official pointed out that:

> In the absence of a detailed policy to govern the process, the ministry sought to put measures in place to mitigate the negative impact of such large-scale recruitment on the teaching service.

The records of the ministry have revealed that between 2000 and 2009, an estimated 3 to 4 per cent of teachers in the public service either have been granted leave to teach abroad or have migrated to work in other jurisdictions. While this may appear to be a small number, it is fairly significant given the size of the public teaching force. While there has not been any study in Barbados to quantify the loss of teachers through migration, the Ministry of Education considers the loss of teachers to be considerable, given the investment by the state in the training, preparation and professional development of the teachers, as well as the years of teaching experience gained by them.

6.3.2 Developing a policy framework for managing the migration process

In the late 1990s, especially since 1998, there was an increase in demand for Barbadian teachers to be contracted in the USA. The Ministry of Education therefore considered it prudent to establish a policy framework to guide the recruitment and migration process. An interview with a former senior education official revealed that initially:

> The Board of Education, City of New York, visited the island and independently set about its recruitment drive without prior consultation with the ministry. However, public service teachers who sought to undertake contracts with the New York Board of Education had to apply to the ministry for permission to leave. This created some challenges for some teachers, who eventually resigned their positions to migrate.

The early approaches to teacher recruitment, as well as the experience with the New York Board, led to the streamlining of the ministry's position on the national approach to managing teacher recruitment and migration. Therefore, in 2001 when the Board of Education, City of New York, approached the Ministry of Education in Barbados to recruit teachers to serve in its school districts, the ministry sought the support of the Cabinet of Barbados to institute a policy to manage the recruitment process, which would be satisfactory to the City of New York Board of Education and the Ministry of Education, Barbados. A former senior ministry official commented:

> While the Government of Barbados agreed to facilitate the participation of teachers in the Caribbean Recruitment Initiative by the New York Board of Education, a limit was

> placed on the number of teachers who could be recruited in a specified time period and special conditions were put in place to manage the process.

Administrative records revealed that a maximum of 20 teachers were to be granted leave in any two-year cycle to accept teaching contracts with the New York Board of Education. Such leave was made conditional and was granted on a no-pay, non-pensionable basis. This is a significant consideration for Barbadian teachers in the calculation of their retirement gratuity and pension payments. The policy also specified the categories of teachers who were ineligible for leave:

> Teachers who, within the previous two years, had completed a course of study, training or no-pay leave to undertake contracts in other jurisdictions, would be required to complete at least two years of service before being eligible for consideration to be recruited. Certain categories of specialist teachers were made ineligible for recruitment, such as teachers who were members of schools' programme teams participating in the education reform programme called the Education Sector Enhancement Programme. Such teachers were required to complete two years of service following the completion of their training.

The Cabinet of Barbados agreed to the conditions articulated in the policy to manage the recruitment of teachers to New York. These conditions formed the basis of an organised policy framework on teacher recruitment and migration in Barbados. As a consequence, since 2001, the Government of Barbados has been guided by a policy framework on teacher recruitment, which was developed following the experience of the 1998 to 2001 period. It also specifically identified persons teaching in areas where skills are in short supply, persons who are bonded by the government, persons who have received specialist training in priority areas and persons who have returned from similar leave or secondments within a given period, among those who were ineligible for leave.

6.3.3 A regional collaborative effort to manage teacher migration

In 2002, the Minister of Education, Jamaica, wrote to his Barbadian counterpart seeking support to host a meeting of Caribbean Community (CARICOM) Education Ministers to address the matter of teacher recruitment in the Caribbean.[6] At the time, the Commonwealth Secretariat offered to support the development of a framework to undergird a recruitment policy and potentially a protocol for Commonwealth countries. The governments of the Commonwealth Caribbean countries recognised the benefit of pursuing a collaborative approach. This formed the basis of a proactive, unified stance to deal with a major challenge that faced small island developing states. The Government of Barbados supported the approach and hosted the meeting.

The minutes of that meeting reflected the experiences of the eight states that participated in the convocation (Antigua and Barbuda, Barbados, Cayman Islands, Grenada, Guyana, Jamaica, St Lucia, and Trinidad and Tobago).[7] The extent of recruitment and migration of teachers varied among the participating countries, resulting in varied impacts. Trinidad and Tobago reported that between 1999 and 2002, there was a teacher turnover rate of 4.5 per cent at the secondary level and 2.4 per cent at the primary level. However, factors other than migration would have contributed to the level of turnover.

Two very interesting approaches were advanced by Trinidad and Tobago. First, teachers who desired to work in other jurisdictions were required to resign their posts to pursue such options. The second was that a package of incentives was introduced to retain their teachers. The package included revision of the teachers' compensation, introduction of professional development programmes, introduction of sabbatical leave, revision of the school management systems, modernisation of schools and teacher training institutions, and teacher assistance programmes.

In the case of Jamaica, a similar pattern of teacher recruitment and migration to the UK and USA was experienced between the late 1990s and 2002. In 2001, 350 teachers migrated to New York and 100 to the UK. A turnover rate of 9.8 per cent was recorded in

that year, with a particular impact on specialised subjects. The Jamaican Minister of Education supported the view that incentives to retain teachers in the region were absolutely vital. Jamaica began offering scholarships to teachers and training up to graduate level.

In Barbados the teacher turnover rate fluctuated between 2.6 per cent in 1999 and 3.5 per cent in 2001. Of note was the contribution made by the Barbadian Consul General to New York. He pointed to three important factors that underpinned the recruitment drive by the New York Board of Education. First there was the migration of inner city New York teachers to suburban schools, thereby creating a demand for teachers to fill the vacated positions. Second, the cultural and ethnic background of Caribbean teachers was closely aligned with the replacements the Board of Education desired to teach second and third generation Caribbean students in New York. Third, it was projected that there was going to be a significant deficit of teachers across the USA by 2009. The Consul General, who was in discussion with the New York Board of Education to assist Barbados in addressing the issues that confronted the island in the recruitment of teachers to that state, encouraged other countries to pursue a similar approach to the one taken by Barbados and Jamaica.

It was generally agreed by the ministers of education that it would be unwise to try to prevent teachers from taking up teaching contracts overseas. Rather, it was their view that small countries in the Caribbean region should seek to negotiate packages with the developed countries to compensate for the loss of teachers through recruitment. At the local level, they also felt that incentives such as special awards and rewards should be introduced, while ensuring that adequate training facilities were provided to fill the positions left vacant by teachers who had been recruited.

The general consensus was that the education systems in the small developing states of the Commonwealth Caribbean were under significant pressure from the recruitment efforts of the USA and UK. There was agreement that a mechanism had to be established to limit the potential 'brain drain' in the region. The culmination of the meeting of Commonwealth countries was the signing of the 'Savannah Accord' in 2002. This accord was the catalyst for the development of the CTRP.

6.3.4 Enhancing the teacher recruitment and migration policy framework

While regional discussions were taking place to formulate a unified position on international teacher recruitment, Barbados was still grappling with its internal approach to managing the loss of teachers through migration. The policy initially developed in 2001 to manage teacher recruitment and migration was significantly enhanced in 2002.

The catalyst for this development was a request by the Jefferson County Public Schools' Board of Education (JCPS) in Louisville, Kentucky, which wrote to the Ministry of Education expressing a desire to recruit teachers from Barbados, and the subsequent extensive negotiations that followed.[8] The JCPS was seeking to recruit between 15 and 25 fully certified teachers in various categories including:

- High school (ages 15–18) – maths, physics and chemistry
- Middle school (ages 11–14) – all content areas
- Elementary (ages 5–10) – general education
- K-12 (ages 5–21) – special education

During the months of discussion and negotiation with the JCPS, a proposed Memorandum of Understanding (MoU) was prepared for signature between the Ministry of Education Barbados and the JCPS.[9] While it was felt by one ministry official that the MoU was an ideal instrument to govern the management of relations between the JCPS and the ministry, the MoU was never officially signed or brought into force by the Barbadian authorities. Nevertheless, Barbadian teachers were awarded three-year contracts to work with the JCPS.

One major outcome of the negotiations with the JCPS was the enhancement of the teacher recruitment and migration policy originally developed in 2001. The ministry, in consultation with the teachers' unions, introduced tighter controls to protect the local education system by extending the categories of teachers who were made ineligible for leave to work overseas. Teachers ineligible for leave to work in other jurisdictions included:

- teachers who were members of the programme teams for the Education Sector Enhancement Programme;
- teachers who had returned to work for a period of less than five years after being granted leave to work in other jurisdictions;
- teachers who had returned to work for a period of less than three years after being granted study leave or training leave;
- teachers who had returned to work for a period of less than five years after being granted secondments to work in other institutions; and
- teachers who were assigned to subject areas where there was a scarcity of skills, such as mathematics, physics, chemistry, biology, geography and special education, as well as other areas that might be determined by the ministry from time to time.

6.3.5 Involvement of the teachers' unions

The teachers' unions in Barbados had an important role to play in the management of the recruitment and migration process. This view was support by a senior executive member of one union and two former senior education officials during interviews conducted.

One education official's comment reflected this position:

> An important dimension of the ministry's policy on teacher recruitment and migration was the involvement of the two teachers' unions, the Barbados Union of Teachers (BUT) and the Barbados Secondary Teachers Union (BSTU), in this national effort.

This view was also supported by the comments of the executive member of one union who stated that 'the ministry invited the union to assist in the development of a protocol to ensure that the local education system did not suffer'. A review of the minutes of a meeting held with the unions in 2002 also confirmed this union support.[10]

The administrative records revealed that one union had no objection to the recruitment and release of teachers, but recommended that in the future efforts should be made to preserve the pension rights of teachers while they were on contract overseas. The union also articulated the view that the Barbados Consul General to New York should facilitate the monitoring of the experiences of Barbadian teachers in the USA.

The other union, while not fully supporting the release of teachers, held the view that incentives should be instituted to retain teachers in Barbados. Nevertheless, the general support of the teachers' unions made the management of the recruitment and migration process much easier, along with enhancing the opportunities for the dissemination of pertinent information on international teacher recruitment and migration.

6.3.6 Adoption of the CTRP

Barbados was represented on the Commonwealth Working Group on Teacher Recruitment, which developed the CTRP in 2004 (Commonwealth Secretariat, 2004). The Government of Barbados formally adopted the CTRP in January 2005. The Ministry of Education is generally satisfied that the existence of a national policy and the adoption of the CTRP have contributed to improvements in the management of the teacher recruitment process in Barbados.

This was highlighted in 2007, when Barbados was approached by the Department of Education, South Africa, to recruit teachers to be contracted to work in that country.[11]

The request, which indicated alignment with the CTRP, was premised on a shortage of teachers in mathematics, science and technology. While the Department of Education was seeking to institute a strategy of recruitment and retention through various incentive schemes, the aim was to satisfy a short-term need. However, due to the policy in Barbados which placed a limit on certain categories of teachers being granted leave to teach in other jurisdictions, Barbados was unable to acquiesce to the request for support in the areas specified.

6.3.7 Retention of Barbadian teachers

The local terms and conditions of service for teachers in Barbados are generally good. The Government of Barbados maintains a policy of tuition-fee-free education up to university level. Barbadian teachers have, through the various teacher training and professional development opportunities provided by the state, benefited tremendously from this level of support. Indeed, teachers are among some of the best paid public officers. The average salary for an experienced, trained graduate teacher is US$58,282 per annum. Other benefits which Barbadian teachers have access to as part of the social provision of the government include:

- paid holiday;
- paid sick leave (21 days per annum for appointed teachers and 14 for temporary teachers);
- a term's leave with pay;
- maternity benefits;
- free healthcare;
- retirement benefits (gratuity and pension).

As a consequence, one union executive expressed the view that 'Barbadian teachers are less inclined to migrate to jurisdictions where the conditions are less favourable than at home'.

6.3.8 Interviews with teachers who migrated

The institution of a policy on teacher migration in 2001 in Barbados created an environment in which those who desired to experience a different teaching and learning culture could pursue that dream with the assurance of being able to return to the local system. The administrative data of the ministry revealed that many of the teachers who migrated a decade ago have since returned to the service. The data also showed that there has been some loss due to resignations, but this has not significantly affected the teaching service.

Interviews with some teachers who migrated and returned revealed interesting insights. It was found that most of the teachers attended a recruitment fair prior to migrating. This was the major approach used by recruiters who came to Barbados. One teacher recalled 'receiving an acceptance letter and a position in a school before migrating to New York'.

The majority of teachers who were interviewed were highly experienced practitioners with more than 25 years in the service. Most of them indicated that they needed a new or different teaching experience and a change from the situation they were in at the time. One teacher expressed a desire to 'experience the US education system and to find out how it compares with the Barbadian system'. Another teacher wanted the opportunity for further career and professional advancement.

There was consensus among those teachers interviewed that various professional development opportunities were provided for teachers in the school districts in which they worked. While continuing professional development was mandatory for all teachers, the form it took varied from after school and weekend staff development sessions on

curriculum content and pedagogy, to university courses in a wide array of subjects and content matter.

It was found that the terms and conditions of service for teachers who went overseas varied significantly from those that existed in Barbados, particularly in the case of classroom management. The following typical responses were provided:

- 'Teaching contracts and licences were required.'
- 'It was easier to fire teachers.'
- 'You are relieved of your duties at the slightest complaint from students.'
- 'The principals have lots of power; you can be fired for some of the simplest things.'
- 'Greater accountability was required of teachers.'
- 'A lot more documentation of classroom activities and incidents was required.'
- 'Teachers were considered wrong until proven right; teachers are not respected as professionals.'

There was a general appreciation among interviewees for the Barbadian education system. This was confirmed by comments such as: *'The Barbados system was better and should not be changed to copy the US system'.*

There were also mixed responses from teachers in relation to the receipt of what they were promised in the compensation packages. Some teachers had no problems, while others did not receive everything that was promised in the time identified during the recruitment phase.

There was a general view among those interviewed that the benefits of teaching overseas were varied, particularly at the personal level. Some of the comments included:

- 'A deeper appreciation of the Barbadian education system; opportunities for professional development; exposure to a new system and development of skills and strategies to help all kinds of students, especially in special education.'
- 'Teaching overseas allowed me to foster professional friendships, complete a master's degree and obtain a home overseas.'
- 'There were professional development and financial benefits.'
- 'The acquisition of new knowledge, teaching experience, new teaching methods and use of materials.'

One of the major challenges highlighted by most teachers was the 'culture shock'. Other concerns articulated included:

- 'A lack of respect for teachers by students.'
- 'Lower academic standards.'
- 'High levels of indiscipline.'

One teacher who migrated to a developing country expressed concern about the: 'limited scope for promotion; lack of openness to suggestions from West Indian teachers by administrators and a willingness to adopt wholesale changes from US or UK.'

It was also found that the majority of teachers who were interviewed were not aware of the CTRP and had not read it. One union executive reported that the union supported the dissemination of the CTRP and assisted in this regard when it was adopted by Barbados.

6.3.9 Teachers migrating to Barbados

While many Barbadians have migrated to other countries in search of new experiences and teaching opportunities, nationals from other countries have also found Barbados to be an attractive domicile in which to teach.

The Ministry of Education maintains a policy in the public schools in which Barbadians are given priority when qualifications and skills are considered for recruitment of teachers. This view was supported by a former senior education official. The official further commented: 'Where a non-Barbadian teacher applies for a teaching position, especially in areas where there are shortages of qualified persons, such non-Barbadians are hired'.

Analysis of administrative data from the Barbadian Immigration Department revealed that between 2006 and 2010, 127 work permits were approved for non-nationals from developed and developing countries to teach in Barbados. The persons granted these permits have all been employed in private educational institutions. The highest number of permits was granted in 2008, with the 'Long-Term' category topping the list. The two most popular work permits granted to non-Barbadians between 2006 and 2010 were the CARICOM Skilled National and the Long-Term work permits. A higher number of Long-Term permits was issued during the period. Two nationalities, Guyanese and Jamaican, dominated the requests for work permits.

6.4 Conclusions

As a small island developing state, Barbados has faced many challenges in the attempt to safeguard state investment in teachers and to maintain a sufficient number of trained and experienced teachers. One major challenge was the direct contact recruiters established with individual teachers and the advertisements placed in the local newspapers. This had the potential to undermine the integrity of the education system through recruiters and teachers not consulting with the ministry prior to the recruitment drive. In addition, the lengthy negotiation meetings placed a strain on the limited resources of the ministry.

Another challenge was one in which some teachers who accepted overseas contracts did not return to duty at the end of their contract period. This resulted in substitutes having to wait several years before getting appointed to the service. In addition, it is difficult to track Barbadian teachers who are not employed in the public service. A further challenge that indirectly affected the ministry was the failure by some recruiters to keep their promises to teachers.

One major solution to the challenges faced by Barbados was to embark on a process of managed migration. To achieve this, a number of elements have been combined to effectively manage the recruitment and migration of teachers to other jurisdictions. First, it was recognised that the granting of 'no-pay leave' to teachers was one way to ensure that the system did not suffer the effects of 'brain drain', but rather allowed experienced teachers who migrated to have the opportunity to return to their positions after their contract periods expired.

Second, direct engagement, negotiation and discussion between the Ministry of Education and recruiting governments or recruiting agents facilitated a better-managed system of recruitment and migration in the context of a small country. The ministry therefore discouraged direct contact and negotiation with public service teachers.

Third, the establishment and maintenance of good working relationships with the teachers' unions was a key component in the development of a policy framework to manage teacher recruitment and migration, one that proved to be highly beneficial. This made the process less disruptive and easier to reach agreement on the terms and conditions governing the policy. The unions also played a role in educating their members about the recruitment policy.

Fourth, the establishment and maintenance of high standards for teachers and the provision of various benefits act as incentives to retain teachers. In addition, by establishing a managed migration approach, it is easier to determine how many teachers are going to migrate and how many replacements are required. This also helps in determining the provision of teacher training to ensure that adequate numbers of trained teachers are available.

One of the most vital components has been the establishment of a policy framework. The Cabinet's approval of a policy to govern the management of teacher recruitment and migration provided legitimacy to the entire process. The policy that was developed clearly identified the categories of persons who are ineligible for leave, limited the numbers per cycle and placed a limit on the length of time that teachers are allowed to be contracted overseas.

Another important element was regional collaboration and sharing of information and best practice among Commonwealth Caribbean countries on teacher recruitment and migration. This resulted in the development of the Savannah Accord, which in turn paved the way for the CTRP.

Finally, the adoption of the CTRP by the Government of Barbados as a tool to underpin the management of the teacher recruitment and migration process has proved to be the most important factor for Barbados. Future research should be focused on conducting a gap analysis on the implementation of the CTRP in Barbados to determine what still needs to be done regarding the dissemination of information on it to all teachers.

Notes

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2 Brown and Schulze (2007) and Manik, Maharaj and Sookrajh (2006) have identified several push and pull factors.

3 Letter from the Government of the Netherlands Antilles, 1993.

4 Letter from Government of Anguilla, 1998.

5 Letter from the Chief Education Officer, Barbados, 1998.

6 Letter from the Minister of Education, Jamaica, 2002.

7 Meeting of Ministers of Education of the Commonwealth Caribbean, Savannah Hotel, Barbados, July 2002.

8 Letter from the Human Resources Coordinator, Jefferson County Public Schools, 2002.

9 Proposed MOU between JCPS and Ministry of Education, Barbados, 2003.

10 Minutes of meeting held by Ministry of Education with the teachers' unions BUT and BSTU, 2002.

11 Letter from the Department of Education, Republic of South Africa, 2007.

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7. Teacher migration and the role of historically black colleges and universities and Hispanic serving institutions in the United States

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Abstract

The Commonwealth Teacher Recruitment Protocol (CTRP) recommends that recruiting countries have an obligation to better manage their own teacher resources so as not to deplete or displace the resources of other countries. This paper examines how investing in minority teacher recruitment and development at historically black colleges and universities (HBCUs) and Hispanic-serving institutions (HSIs) may help the US better manage its teacher supply and demand, thus reducing the need to recruit from limited pools of trained teachers in developing nations.

Teacher education programmes at HBCUs and HSIs are uniquely suited to prepare teachers to work effectively in challenging schools in which overseas-trained teachers may have difficulty. HBCUs and HSIs can also play an important role in providing in-service professional development for new teachers from other countries.

This paper also addresses how HBCUs can increase awareness of the Commonwealth Teacher Recruitment Protocol and advocate for the fair treatment of teachers from other countries. The case of Prince George's County public schools (PGCPS) in the United States is used as a case study and an example of the mistreatment of overseas teachers recruited to teach in shortage areas in the United States. It also demonstrates how HBCUs can play a role in helping the United States better manage its teacher resources, so these situations can be avoided. The author recommends that HBCUs also participate with Commonwealth working groups and advisory committees to broaden collaboration and perspectives.

Key words
HBCUs, Teacher Shortage, Minority Teachers, Urban Schools

7.1 Commonwealth Teacher Recruitment Protocol

The Commonwealth Teacher Recruitment Protocol (CTRP) sets standards and identifies best practices in managing international teacher migration for both source and recruiting countries (Commonwealth Secretariat, 2004). The CTRP requires that recruiting countries manage the supply and demand of teachers in their own countries in such a way that does not deplete the supply of teachers in source countries. It specifically addresses factors that contribute to brain drain in the source country and brain waste in the recruiting country.[1]

The CTRP also addresses the need to respect the recruited teacher's rights and sets out their responsibilities. The Fifth Commonwealth Teachers' Research Symposium discouraged the commodification or commercialisation of teachers (Ochs, 2011). The research of Dr Sadhana Manik, who studied teacher migration between South Africa and the United Kingdom (UK), found that some migrating teachers felt like commodities to be bought and sold on the open market (Degazon-Johnson, 2010). To combat this negative perception, teachers' professionalism and qualifications should be enhanced and their rights should be respected (Degazon-Johnson, 2010).

7.2 Root causes of teacher shortages

So how can the US better comply with the CTRP recommendations? These recommendations call for better management of a country's pipeline of teachers and the fair treatment of skilled, but vulnerable overseas-trained teachers. In other words, how can the US better manage its domestic teacher supply and demand in such a way as not to exhaust or exploit the pools of teachers in other countries? I argue in the latter part of this paper that HBCUS can play a role in helping stymie teacher shortages.

There is a need to understand push and pull factors associated with teacher migration and teacher shortages better. This was an Advisory Board recommendation made at the Inaugural Meeting of the Commonwealth Advisory Council in 2010 (Chanda, 2010). There is a chronic need in US schools to staff inner-city schools in critical-need subject areas with highly qualified teachers.[2] This need serves as a pull factor, or an attraction for many teachers in other countries to quit their jobs, dispose of property, leave families and migrate to the US, as many Filipino and other teachers have done.

However, it is also important to note that teachers have a right to migrate. They migrate as people first, with specific desires and needs. They may migrate to feel safer, have a higher standard of living for themselves and their families, and satisfy the need for self-fulfilment. Recruiting countries like the US have greatly benefited from the talents of international teachers. While wealthy nations like the US must better manage their own supplies of teachers as stipulated by the CTRP, this does not dwarf the need for overseas-trained teachers to be treated fairly by school systems in host countries.

Causes of teacher migration must also be understood by recruiting countries. The 2009 American Federation of Teachers' (AFT) report *Importing Educators* argues that the public school system in the US has either been 'unwilling or unable' to address root causes of US teacher shortage, which the report's author admits are multiple and overlapping. Instead, these school systems have simply resorted to the migration merry-go-round (AFT, 2009). Support for examining the root causes of teacher shortages in a broader context beyond the economics of supply and demand was garnered at the Fourth Commonwealth Teachers' Research Symposium, hosted by the National Education Association in Washington, DC, in 2009. Participants proposed a Global Initiative on Teachers that would incorporate policy perspectives and a broader spectrum of voices to promote information sharing and problem solving (Degazon-Johnson, 2010). This broader spectrum of voices would consider why there are teacher shortages in inner-city classrooms in the US and in certain critical subject areas like mathematics and science.

The number of foreign teachers recruited by large urban school districts in the US has steadily increased, slowed only by the recent economic downturn. The 2009 AFT report found this same upward trend in the reliance on overseas-trained teachers as a 'stop-gap' measure for US hard-to-staff classrooms. The AFT estimates that approximately 200,000 new educators will be required to staff classrooms each year, and 70,000 of them will be needed in poor schools in urban areas. The AFT report also found that the number of teachers that entered the US on a J-1 visa had dropped overall since 2001 (AFT, 2009: 13).[3]

The number of overseas-trained teachers has slightly decreased as states in the US slash budgets for schools. For example, Mayor Bloomberg in New York announced state budget cuts in February 2011 that would result in 4,700 teachers losing their jobs (Hernandez, 2011).

The following section will look at how the need for teachers to staff inner-city classrooms in Prince George's County public schools (PGCPS), an urban suburb of Washington, DC, drove school officials to resort to unsavoury practices in recruiting and managing foreign-trained teachers. Even under the threat of sanctions from the Department of Labor, the school system still insists that they must recruit teachers globally to fill slots in specialised fields.

7.3 Prince George's County public schools

Despite a fluctuating job market for teachers, violations of migrating teachers' rights seem to hold steady. PGCPS is a case study of why investing in minority teacher recruitment and development at minority serving institutions will help the US better manage its teacher supply, but also an example of the mistreatment of overseas teachers; one of several cases in recent years of US school systems violating the rights of teachers recruited from other countries. The case study demonstrates how HBCUs and other minority serving institutions can play a role in helping the US better manage its teacher resources, so these situations can be avoided.

PGCPS, one of the largest and most diverse urban school districts in the state of Maryland, also serves the Washington, DC, metro area. It has steadily recruited from the ranks of foreign teachers. In 2002, approximately 62 overseas-trained teachers were recruited in PGCPS, approximately 111 in 2003, and 249 were recruited in 2007, mainly from the Philippines (Samuels, 2011). So heavy are the exports of skilled labour from the Philippines that the country receives 25 per cent of its GDP from remittances (Ochs, 2011). PGCPS currently has 900–1,000 overseas-trained teachers serving in its ranks. Different sources, however, quote different numbers and this speaks to the consistent recommendation for the need for accurate reporting and data collection (Degazon-Johnson, 2010).

Many of the overseas-trained teachers in PGCPS were recruited to teach in shortage areas, such as mathematics, science, English as a Second Language (ESL) and special education. In 2010–2011, PGCPS only recruited one overseas-trained teacher on an H-1B visa[4]. This is likely due to the downturn in the economy that began in 2008–2009 and the investigation by the US Department of Labor into the hiring and recruitment practices of international teachers in PGCPS. In 2011, the school system suspended all international recruitment as it battled charges from the US Department of Labor of mismanagement and mistreatment of hundreds of international teachers (Samuels, 2011).

In April 2011, the US Department of Labor fined PGCPS more than US$5.9 million dollars in penalties for infractions regarding equal pay of teachers from the Philippines. The Department of Labor characterised the school district's action toward the teachers as a 'willful violation' of labour laws (Samuels, 2011, para. 3). According to the Department of Labor, the school system relinquished its responsibilities by shifting the cost of the H-1B work visas onto the recruited teachers, totalling more than US$5,000 for an individual teacher (Samuels, 2011). According to the Department of Labor, PGCPS unlawfully docked the pay of 1,044 H-1B teachers by having them pay more than US$4 million in fees (US Department of Labor, 2011).

Other instances were cited where the school district docked teachers' salaries for visa and processing fees (Valentine, 2011). The Department of Labor also charged Prince George's County school system for underpaying internationally recruited teachers as a result of reducing their wages for the payment of various fees (US Department of Labor, 2011). The Department of Labor has ordered restitution in the form of back pay and stiff fines (Medina, 2011). PGCPS says it acted in good faith and has co-operated with the US Department of Labor (PGCPS, 2011).

The possibility of the school district being prohibited from recruiting internationally remains. School spokesman Briant Coleman warned, 'If that were to happen, academic performance could be affected' (Valentine, 2011, para. 10).

According to PGCPS's proposed 2011 operating budget, the International Teacher Employment Programme (ITEP) was being used to recruit international teachers (PGCPS, 2010). In 2007, the Bernard Hodes Global Network, with operations in five continents, used a global marketing and recruitment firm (PGCPS, 2007). Mathematics, science, special education and ESL teachers were the most sought after in international recruitment drives. However, as a result of the US recession, many school districts were cutting back. PGCPS was no exception, although, according to PGCPS' Human Resources

Director, some foreign teachers would not be affected by budget cuts because they had become permanent residents through having obtained their green cards. These teachers no longer needed sponsorship through the school system or a temporary HB-1 visa.

Teachers from the Philippines faced non-renewal of visas as far back as 2009–2010 in Prince George's County. Several teachers from the Philippines had been dismissed and others were languishing in uncertainty. The Philippine Educators Network (PEN) was formed in 2010 as the official voice of educators from the Philippines in the county. PEN's objectives include representing its members' rights and interests and cultivating an awareness of the rich culture and language of the Philippines. The President of PEN in Maryland, Dr Carlo Parapara, described the situation as discriminatory (Medina, 2011). PEN Secretary, Millet Panga, reported in an interview that, 'Most of the teachers have been "uprooted" by their move to teach in the county, selling property in the Philippines and bringing their family into America on expectations that they won't have any problem securing their green cards, as long as they do their jobs well' (Medina, 2011, para. 15).

PGCPS is the latest notch on a string of investigations into suspected wrongdoing in the recruitment and management of overseas-trained educators in the US. The Department of Labor has investigated 17 cases of similar suspected wrongdoing since 2005 (AFT, 2009). A recent case of suspected mismanagement occurred in Los Angeles, California, and involved teachers from other countries hired to teach in hard-to-staff inner city classrooms in the New Designs Charter School. Baltimore City public schools is another case in point, examined in detail in the 2009 AFT report. By 2009, more than 600 Filipino teachers had been recruited to teach in urban classrooms in Baltimore. The well-intentioned recruits were often preyed upon by dubious recruitment agencies using the Filipino teachers' prized skills in mathematics and science as bait for hungry inner-city school officials trying to staff classrooms.

How can the US cultivate its own crop of teachers in critical shortage areas, who are capable and willing to work in challenging schools without drawing down limited pools of teachers in developing countries? Consider the extent of the problem. The highlighted case of teacher recruitment abuse in this paper resulted from trying to staff classrooms in inner-city or challenging schools with high minority populations like those found in Baltimore, Los Angeles and Prince George's County. Foreign teachers needed in these schools were primarily those skilled in shortage subject areas like mathematics, science, special education and ESL. PGCPS has 80 overseas-trained special educators, the highest number of special educators teaching on a H1-B visa in any school system across the country according to a 2011 study by the Center for Immigration Studies (CIS) (North, 2011). Even as the US Department of Labor and PGCPS negotiated a way forward after the school system was fined millions of dollars, school officials maintained that overseas-trained teachers in critical disciplines like maths and science would have a better chance of keeping their jobs than other overseas-trained teachers in less-critical disciplines (Valentine, 2011). Facing a ban on international recruitment altogether, PGCPS officials believed that such a measure '… penalizes a school system that has strived to obtain qualified teachers in the same or similar manner used by other school systems around the country' (Valentine, 2011, para. 11).

Yet there is little safety in numbers. Schools in the US trying to staff classrooms in hard-to-fill subjects are in a quandary. In the 2010 report *Closing the Teacher Gap,* researchers Carol Anne Spreen of the University of Virginia, David Edwards of the National Education Association (NEA) and Shannon Lederer of AFT examined the US context in regard to international teacher recruitment. They estimated that some 30,000 to 50,000 overseas-trained teachers were hired in hard-to-staff schools in the US teaching in critical shortage areas (Degazon-Johnson, 2010). The researchers see international recruitment as a 'band-aid' approach that treats the symptom without examining the deeper issues that underlie the shortages in the first place (AFT, 2009).

For example, hard-to-staff schools are ones that end up with the most foreign teachers. These schools are primarily attended by low-achieving, but well-deserving minority students needing special attention. Challenging schools may be shunned by teachers who

do not feel that they have the training to effectively teach students in urban or high-risk settings. The author, having worked with pre-service and in-service teachers in a variety of university teacher preparation programmes, can confirm that there is little or no explicit attention paid to how to effectively teach urban learners or learners with special needs. Hence teachers graduating from these programmes will feel unprepared to work in settings where they encounter these students in high numbers. Teachers that lack the skills required to teach in challenging settings, tend to leave them relatively soon (Darling-Hammond, 2003). The attrition rates in poor urban schools can be as high as 50 to 80 per cent for a teacher in the first three years of service (Degazon-Johnson, 2010). This is due to resignation and visa expiration, since inner-city schools are more likely to have new teachers and overseas-trained teachers.

7.4 Minority teacher investment

The teacher shortage is a distribution shortage, a training shortage and what could be called a minority teacher investment shortage (Alliance for Excellent Education, 2004). A minority teacher investment shortage is when insufficient resources – both material and human – are focused on addressing the shortage of minority teachers trained to work in difficult and challenging schools like PGCPS. The role of HBCUs in ameliorating both the training issue and the minority teacher investment shortage will be examined in this and the following section.

The Director of the NEA Department of Teacher Quality, Segun Eubanks, supported this slightly more nuanced understanding of the teacher shortage in his presentation at the Fourth Commonwealth Teachers' Research Symposium in 2009. Eubanks was not convinced that there was a teacher shortage in the US, or at least not in the conventional sense. Rather Eubanks argued that there might even be a surplus of teachers for some available positions. Eubanks also stated that, rather than a shortage of teachers, there was a shortage of enthusiasm among educators to take on teaching assignments in urban, or high-poverty or high-minority schools (Degazon-Johnson, 2010).

A recent 2011 report from CIS made a similar claim. The study, authored by CIS Fellow David North, stated that US teachers were either inadequately trained to teach in challenging schools, not actively recruited by schools to do so or unwilling to teach in settings with high numbers of minority and poor students, who might have limited English proficiency and other special needs (North, 2011). This results in school officials tapping into teacher pools from developing countries, instead of properly managing their own. In the 2010 report *Closing the Teacher Gap,* researchers from the University of Virginia, NEA and the AFT argued that schools may have ulterior motives in not hiring US teachers. These motives included undermining teacher unions, hiring cheaper labour and building a less demanding workforce (Degazon-Johnson, 2010).

Using the Department of Labor's H1-B Case Database, North noted that the highest concentrations of foreign teachers were clustered in areas with the highest enrolments of poor and minority children. These children were often dual language learners and might have systemic achievement gaps. Texas recruits hundreds of bilingual teachers from Spanish-speaking countries each year to serve a large Hispanic population. School officials in Texas have been criticised for not tapping into more local teacher markets and increasing their own capacity, instead of depleting limited reserves of teachers in emerging countries, who need trained teachers to help develop their nations. According to the CIS report, large city schools in New York City; Houston, Texas; Newark, New Jersey; Baltimore and Prince George's County, Maryland, have some of the highest concentrations of overseas-trained teachers (North, 2011).

North (2011) writes about the impact on disadvantaged schools that over-rely on internationally recruited teachers to staff classrooms. Teachers recruited from other parts of the world are often well educated in their fields. Many are just as skilled – if not more so – than their American counterparts. Teachers from other countries also provide students with valuable international cultural experiences. However, overseas-trained teachers may

lack the cultural familiarity and the specific skill set required to help children with multiple deficits and achievement gaps often found in high-poverty and urban schools – the very schools in which they are likely to be placed. While foreign teachers are highly skilled in the content, they are new to American culture and even less familiar with American minority subcultures. More attention needs to be paid to the cultural mismatch between foreign teachers and their students. Overseas-trained teachers need specialised professional development in the special needs of American minority students, including their cultural needs. HBCUs specialise in culturally competent teaching and can provide professional development to teachers new to the US, thereby increasing their success in the classroom.

7.5 HBCUs and HSIs and teacher migration

Investing in minority teacher development at historically black colleges and universities (HBCUs) and Hispanic-serving institutions (HSIs) may help the US better manage its teacher supply and reduce the need to recruit limited pools of overseas-trained teachers from Commonwealth and non-Commonwealth countries. In addition, HBCUs and HSIs can become important allies in advocating for the fair treatment of overseas trained teachers.

HBCUs are colleges and universities that were founded when African-Americans were not allowed to attend white institutions of higher education. HBCUs usually have a high enrolment of black students, but this is not always the case. HBCUs are institutions of higher learning founded for the education of disadvantaged persons, but which do not exclude others from attending.

HSIs are colleges and universities that have a traditionally high Hispanic enrolment (a minimum 25 per cent full-time Hispanic undergraduate enrolment). The Hispanic population is the fastest growing population in the United States and the institutions dedicated to serving them (HSIs) have more than doubled in the last 20 years. There are approximately 100 HSIs in existence. HSIs are non-profit institutions of higher learning (Hispanic Association of Colleges and Universities, undated).

Many HBCUs and HSIs were originally founded as teacher training institutions, and produce a small but steady supply of the nation's minority teachers; HBCUs produce about 85 per cent of the nation's minority teachers. Today HBCUs and HSIs have a diverse student body, but remain committed to their missions of equal opportunity and educating African-Americans and Hispanic students. Teachers trained in teacher education programmes at HBCUs and HSIs have often been exposed to a rigorous curriculum focusing on how to work with minority children, their parents and the communities in which they live (Noel, 2010).

Due to the unique mission of HBCUs and HSIs, they often have linkages with urban and or challenging schools and use these partnerships to expose students to difficult school settings. As a result, pre-service teachers in these minority serving institutions may have spent more quality time in challenging school settings working with Hispanic and African-American children than pre-service teachers in more traditional university teacher training programmes (Williams, Graham, McCary-Henderson and Floyd, 2009).

Teacher education programmes at HBCUs and HSIs often co-operate with or receive special funding from the US government and other agencies to develop minority teachers in critical shortage areas such as mathematics, science, special education and ESL. One such programme, *Ready to Teach* at Howard University, an HBCU, is described in later sections of this paper.[5] Teachers who participate in these special programmes at HBCUs also make a commitment to use their skills to teach in challenging schools, such as those found in New York City, Baltimore, Prince George's County and in Houston. These are the very school systems that often resort to overseas recruitment and mismanagement of foreign teachers, when other qualified US teachers are not available. This harkens back to the observation made by NEA Director of Teacher Quality, Segun Eubanks, that rather

than a shortage of teachers, there is a shortage of enthusiasm among teachers to teach in urban, or high-poverty or high-minority schools (Degazon-Johnson, 2010).

While many teacher preparation programmes, including non-HBCU and non-HSI programmes, are dedicated to preparing teachers who will be able to work well with all students, including minority children and those in urban schools, HBCUs and HSIs are equipped with special tools to do so. These tools include the historical legacy and mission that guides their efforts, large numbers of minority faculty with ties to these schools and communities, pre-service teachers who may have been products of the very schools that they are now being trained to teach in, and a research and advocacy agenda that focuses on social justice and human rights. Together this increases the commitment of teachers trained in HBCUs and HSIs to not only serve students well in challenging schools, but to also serve as mentors, role models and community advocates.

In terms of teacher migration to the US, HBCUs and HSIs can play an important role in providing in-service professional development for new teachers from other countries. Teacher training programmes at HBCUs, as well as HSIs and other institutions, often form professional development school (PDS) relationships with primary and secondary schools. In exchange for having access to schools for research and clinical practice for interns, university professors provide professional development. Accrediting bodies of teacher preparation programmes also encourage universities to collaborate with schools in this way, and have explicit standards to measure their effectiveness in doing so. In-service professional development enables overseas-trained teachers to be more effective in the challenging school settings in which they are often placed. HBCU faculty expertise is partly derived from deep ties with Commonwealth countries, as well as research and advocacy agendas that support their well-being.

Next, HBCUs and HSIs have had much success with developing the talent of African-American and Hispanic males and want to translate that success into producing more minority male teachers (Mikyong and Conrad, 2006). Male teachers are especially targeted in overseas recruitment drives due to their low numbers in the teaching profession in the US and in other developed nations. Approximately 1.7 per cent of the 4.8 million public school teachers in the US are black males (Council of the Great City Schools, 2010). Teachers of colour in the US make up only 16 per cent of the total teaching population. Some 42 per cent of public schools have no minority teacher at all.

Lastly, HBCUs and HSIs can serve as excellent conduits to promote the CTRP. As institutions, HBCUs and HSIs have lasting relationships and partnerships with the developing world, guided by missions that promote social justice. HBCUs like Howard University have partnerships and exchange programmes in several African countries, supported by faculty with explicit research agendas that support the social justice mission of the university. The missions of HSIs are made clear in a 13-point typology developed by the Hispanic Association of Colleges and Universities (HACU). The typology is meant to further define the role that HSIs should play in the future. The first major characteristic in the typology of an HSI is how well it serves Hispanic students and how clear that mission is made in the mission and other guiding documents of the institution (HACU, undated).

7.6 *Ready to Teach* programme

The *Ready to Teach* programme is highlighted here as one example of a programme at a HBCU that is designed to specifically address the minority teacher investment shortage. These efforts are in line with the *No Child Left Behind* (NCLB) Act. The NCLB law encourages colleges and universities to establish goals to address teacher shortages and be more responsive to their communities' school and staffing needs. HBCUs and HSIs have taken this charge seriously, including the School of Education at Howard University. Howard University is a HBCU located in the historic Shaw-Howard district of Washington, DC. Miner Teachers College was an important part of the early beginnings of the university that came into being shortly after the US Civil War.

In an effort to increase the numbers of minority teachers in high-need content areas and high-needs schools, Howard University's School of Education established a national consortium called *Ready to Teach.* The programme is funded by the US Department of Education to develop teachers in critical shortage areas drawn primarily, but not exclusively, from underrepresented groups in the teaching force in the US. The national consortium provides participants with the opportunity to pursue their teaching licence in the high-need areas of English, reading, special education, science and mathematics, at both the primary and secondary levels. HBCUs remain the main producers of black graduates in the science, technology, engineering and mathematics (STEM) fields that form the pool of K-12 teachers in critical shortage areas like mathematics and science. The *Ready to Teach* programme at Howard University utilises these STEM graduates as a pool of future teachers in mathematics and science.

The *Ready to Teach* programme addresses a national obligation to diversify the ranks of the teaching force and to stem the teacher shortage, especially in critical shortage areas. This is in line with the spirit and intent of the CTRP. Increasing the numbers of highly qualified minority teachers in critical shortage areas provides role models for all students, but especially helps minority students (Darling-Hammond, 2003). Therefore the *Ready to Teach* programme and other programmes like it support the key tenets of the CTRP. The protocol focuses on balancing the rights and responsibilities of both the source and recruiting countries, as well as a teacher's right to migrate and be treated fairly. The protocol specifically states that it is the responsibility of recruiting countries like the US to properly manage their domestic teacher supplies. The *Ready to Teach* programme is one of many ways that HBCUs can contribute to this very important effort.

7.7 Conclusion and recommendations

This paper discussed how minority teacher shortages must be examined in a broader context and how the role of HBCUs and HSIs in alleviating minority teacher shortages should be considered. HBCUs and HSIs are minority-serving institutions and are particularly suited to address the minority teacher shortage. HBCUs, like HSIs, are also uniquely equipped to address more effectively the professional development needs of overseas-trained teachers working in challenging schools. Minority teacher graduates from HBCUs are trained to teach in hard-to-staff urban classrooms that sometimes must resort to overseas recruitment to find qualified teachers. PGCPS was examined as a case study of mistreatment of overseas teachers, and why investing in minority teacher recruitment and development at HBCUs and HSIs might help the US better manage its teacher supply.

Teacher preparation programmes at HBCUs can also be important collaborators in promoting the CTRP and advancing research that supports its aims, intents and purposes. HBCUs can be important advocates for respecting the rights of overseas-trained teachers. One important recommendation is that HBCU representation is needed on Commonwealth working groups and advisory committees to broaden support for the CTRP and develop a deeper understanding of teacher supply and demand in the US.

Recognising the importance of teachers to student learning is what powers the migration cycle. Research has clearly shown that an effective teacher is the critical element, although not the only one, in a student's success in the classroom. The *Global Perspectives on Teacher learning: Improving Policy and Practice* emphasised this point by concluding that, 'Teaching is arguably the strongest school-level determinant of student achievement' (Schwille, Deiubele and Schubert, 2007: 21). The International Summit on the Teaching Profession, hosted by the US Department of Education and held in New York City on 17 March 2011 reinforced this observation. Education Secretary Arne Duncan, who helped organise the summit, reiterated the primacy of the teacher in his statement that '…it takes a high-quality system for recruiting, training, retaining and supporting teachers over the course of their careers to develop an effective teaching force' (US Department of Education, 2011, para. 3).

The purpose of the summit was to engage the international community in addressing the common challenges of teacher quality and student learning. The issue of teacher migration from poorer countries to richer ones needs higher visibility in these types of global fora. Teacher migration is often viewed as the consequence of seemingly intractable teacher shortages brought on by a myriad of problems in the global economic system. While this may be partly true, teacher shortages in certain subject areas in challenging schools may not be as intractable as they may seem. HBCUs are valuable resources in training teachers to work effectively with all students, but especially with minority students and students in challenging schools.

It is important to note that teacher migration has many positive benefits for both sending and receiving countries. International teachers provide important skills and global learning experiences to American students. Remittances are important sources of income for developing nations. Overseas-trained teachers, however, must be treated fairly and given the support to be successful. HBCUs, with their unique missions and global charters, can be important allies in these causes.

Notes

1 Brain drain is the drawing down of teacher talent in developing countries. Brain waste is the underutilisation of the talents of migrating teachers by recruiting countries.
2 Inner-city schools are primary and secondary schools located in urban areas that are sometimes poor. Children that attend inner-city schools may have disadvantaged backgrounds and are disproportionately minority students.
3 The J-1 Visa is a cultural exchange visa that is issued for one year with the option to be renewed twice, for up to three years. Teachers must have a Department of State sponsor and are required to return back to the sending country for at least two years, as part of a residency requirement.
4 The H-1B visa is designed for workers engaged in a professional occupation in the United States that requires a college education to enter the field. H-1B visa holders take positions in such specialty areas as law, business, medicine, scientific research, and professional teaching.
5 Gratitude is expressed to the *Ready to Teach* programme at Howard University and its funder, the US Department of Education, for the use of data and information regarding the programme.

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8. The need for teachers: An Ethiopian case study

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Abstract

This paper presents a general overview of the recruitment of international teachers to augment the teaching cadre in Ethiopia. One of the purposes of the Commonwealth Research Symposium on Teacher Mobility, Recruitment and Migration in 2011 was to learn from the experience of the Commonwealth Teacher Recruitment Protocol (CTRP). Although Ethiopia is not a member of the Commonwealth, this paper intends to present Ethiopia's experience related to the themes of the symposium. The paper analyses the issues related to the CTRP to help design a new protocol for future teacher management in relation to international recruitment.

Key words
Teacher, Recruitment, Ethiopia, Migration, Commonwealth, Protocol

8.1 Introduction[1]

Current global and regional teacher supply and recruitment trends are not encouraging, and many countries will not meet the projected demand. The trend of teacher shortage is generally seen across all levels of education, but poor countries are particularly focusing their efforts in meeting the goal of universal primary education (UPE). According to the UNESCO Institute for Statistics (UIS), among the 208 countries that reported teacher data for 2009, 112 countries will have a shortfall and collectively need at least 2 million extra teachers between 2009 and 2015 to meet the UPE goal. More than half of these countries (1,115,000 or 55 per cent) are in sub-Saharan Africa (UIS, 2011). Given the situation at the initial level of education, further levels up to higher education face even greater challenges.

The Ethiopian government has mounted a campaign to meet the Millennium Development Goals (MDGs) target of achieving universal primary education and the six goals of Education for All (EFA), targeting all levels of education both formal and non-formal by 2015. However, Ethiopia faces numerous challenges in delivering education services to its population, one of which is ensuring an adequate size of its qualified teaching force. The high rate of population growth in the country, together with the high proportion of youth, creates immense pressure on the education system. The population of Ethiopia almost quadrupled in the past 50 years, and is expected to grow to 92 million by 2015. The youth population aged 0–24 now comprises about half of the total population and the demand for education is expected to grow as well (see Table 8.1).[2]

Ethiopia will need a significant increase in education expenditure simply to maintain its present coverage of all levels of formal education. During the five years 2005/06–2009/10, the total government expenditure increased from less than 34 billion Ethiopian Birr to over 60 billion Birr. During the same period, education expenditure almost tripled from 6 billion Birr to 16 billion Birr[4] (Ethiopian Ministry of Education, 2011) (see Table 8.2).

Table 8.1 Population growth in Ethiopia from 1950–2015 (in thousands; total and percentage aged 0–24)

Year	1950	1960	1970	1980	1990	2000	2010	2015
Total population[3]	18,434	22,553	28,959	35,426	48,333	65,578	82,950	92,000
Percentage aged 0–24	63	49.7	49.3	50	49.9	51.3	53.5	52.5

Source: United Nations, 2011.

Table 8.2 Education budget and expenditure in Ethiopia (2005–10)

Year	2005/06	2006/07	2007/08	2008/09	2009/10
Education expenditure (million Birr)	5,990.6	7,632.5	9,372.9	11,340.7	15,658.6
Total government expenditure (million Birr)	33,615.9	30,998.2	41,070.9	48,035.2	60,342.3
% Education of total government exp.	17.8%	24.6%	22.8%	23.6%	25.9%

Source: Ministry of Finance and Economy Development, cited in Ethiopian Ministry of Education, 2011.

This education funding is complemented significantly by external sources. In 2008, Ethiopia disbursed US$233.6 million of official development assistance (ODA) for education, the largest amount among sub-Saharan African countries. The ratio of ODA for education to total public expenditure on education was quite large, at 41.8 per cent.[5]

In addition to the funding augmentation, the Ethiopian government has been increasing the teaching force by training more teachers in the country, and also by recruiting foreign teachers. Although from a sustainable development perspective it is ideal to train and recruit sufficient teachers locally, when the supply of teachers has yet to catch up with the demand, many countries often recruit foreign teachers to bridge the teacher gap. Increased participation at the primary level, the expansion of secondary and post-secondary education, as well as the growing influence of globalisation, have changed the nature of international recruitment of teachers globally and in Ethiopia. In the case of Ethiopia, there has been an organised recruitment, targeted mainly at the higher education and technical and vocational education and training (TVET) levels.

8.2 The purpose of this paper

The purpose of this paper is to present a general overview of the recruitment of international teachers to augment the teaching cadre in Ethiopia. One of the purposes of the Sixth Symposium is to learn from the experience of the Commonwealth Teacher Recruitment Protocol. Although Ethiopia is not a member of the Commonwealth, this paper intends to present Ethiopia's experience related to the themes of the symposium.

First, the paper presents a general overview of the growing education system in Ethiopia, including enrolment, teacher demand and supply, teacher qualifications and international recruitment of teachers. The following section analyses current practices, and examines the extent to which Ethiopia's teacher recruitment practices align with the standards proposed in the Commonwealth Teacher Recruitment Protocol (CTRP). Fair and ethical treatment in the international recruitment of teachers is an important cornerstone of the CTRP. The African Union (2006) also acknowledges the usefulness of the protocol as part of its Plan of Action for the Second Decade of Education, encouraging a similar arrangement to be made in the continent. This case study examines important issues in the process of international recruitment of teachers in Ethiopia, which can become a useful input for planning future management of teachers nationally, regionally and globally.

8.3 Background and educational context

8.3.1 Teachers migrating to Barbados

Ethiopia's total land area is about 1.1 million square kilometres (sq.km), of which about two thirds is estimated to be potentially suitable for agricultural production. Currently,

Table 8.3 Socio-economic indicators in Ethiopia (2009)

Population, total (millions)	81.2
Population growth (annual %)	2.2
Children of primary school age who are out of school (%)	17
Adult literacy rate (aged 15–49) (2005)	29.8
GDP growth rate (%)	8.8
GDP per capita (PPP) US$	950

Source: UNESCO Institute of Statistics, 2009.

Ethiopia is the second most populous country in Africa, after Nigeria. Sixty-five million people live in the highland temperate part of the country while approximately 12 million inhabit the lowland that covers 60 per cent of the country's landmass. The main occupation in the highlands is farming, while the lowlands are mostly occupied by pastoral populations (Economist Intelligence Unit, 2008).

Ethiopia has a three-tiered ethnic-based federalist system of government, comprising the federal government; nine administrative regions and two chartered city administrations; and more than 800 *woredas* (districts) and sub-cities. The government is made up of two tiers of parliament: the House of Peoples' Representatives and the House of Federation, where political leaders are elected every five years.

Table 8.3 shows some of the country's basic socio-economic indicators, which demonstrate a rapid growth of population and economy, yet great challenges in education, i.e., primary education participation and adult literacy.

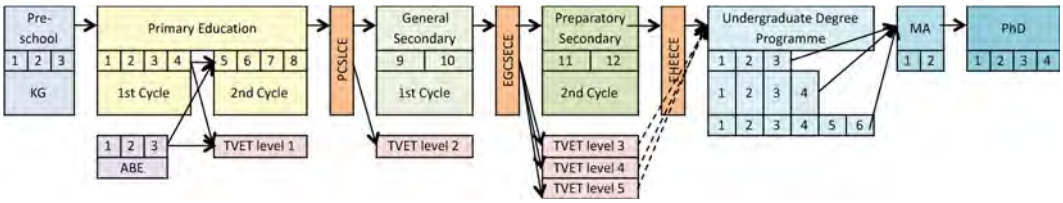
8.3.2 Education system in Ethiopia

The education system in the country encompasses formal and non-formal education. It covers a wide range of training, both for primary school age children as well as adults who have dropped out or are beginners. The formal system has further been divided into kindergarten, general, technical and vocational education and training (TVET) and tertiary education programmes. Primary education consists of two cycles of four years each: i.e., the first primary cycle is grades 1–4, while the second cycle is of grades 5–8. Alternative basic education (ABE) facilities offer three years with an alternative curriculum as a substitute for the four years that is the regular primary first cycle. The secondary level consists of two cycles of two years each: 9–10 and 11–12. Those who complete ten years of schooling may either enter the second cycle to prepare for higher education, or enter TVET institutions to be trained for productive employment (see Figure 8.1).

Ethiopia's education administration is highly decentralised, and gives administrative autonomy to the regions and the districts. The Ministry of Education has only a limited mandate in allocating funds disbursed by the Ministry of Finance.[6] Public expenditure on education is thus incurred by varying levels of government, and the allocation across education and other mandates reveals the priorities and preferences of elected local bodies. In such a setting, achieving national and global development goals poses a special challenge; once achieved, however, they have higher probability of being sustained than in a top-down, centralised model.

Gender equality and TVET are important components of Ethiopia's education policies. Since the arrival of the Education for All goals, Ethiopia has made efforts to improve access to schooling and, in particular, to target girls' enrolment. According to the Ministry of Education, the goal of TVET is to create a competent, adaptable and innovative workforce in Ethiopia, thus contributing to poverty reduction and social and economic development. Demand for TVET has outstripped public supply in several regions, leading to rapid growth of private provision to fill the unmet demand. Private provision of TVET services has expanded to serve 57 per cent of total trainees in 2007/08, up from 16 per cent four years earlier. The total number of TVET institutions increased significantly from 388

Figure 8.1 Structure of the Ethiopian education system



ABE alternative basic education
EGSECE Ethiopian General Secondary Education Certificate Examination
EHEECE Ethiopian Higher Education Entrance Certificate Examination
KG Kindergarten
MA master's degree
PhD Doctor of Philosophy degree
PSLCE Primary School Learning Certificate Examination
Source: Ethiopian Ministry of Education (2010).

in 2006/07 to 505 in 2010–11 (Ethiopian Ministry of Education, 2011). TVET is also an area of teacher shortage. Ethiopia recruits many expatriate teachers of science and technology to address this teacher gap.

The government started collecting information on teacher education institutions (TEIs) offering diploma programmes since 2007/08. The number of teacher education institutions increased from 24 in 2007/08 to 32 in 2010/11 (Ethiopian Ministry of Education, 2011).

Higher education includes institutions that provide from three to six years of undergraduate programmes, as well as two-year master's and four-year PhD programmes. As of 2010/2011, there were 22 government higher education institutions (Ethiopian Ministry of Education, 2011), and 64 accredited non-governmental higher education institutions (Ethiopian Ministry of Education, 2010).

8.3.3 Increased participation at all levels of education

Education is a high priority in Ethiopia's development strategy – both as a pre-requisite for the democratic participation of citizens, and as human capital investment for raising labour productivity and promoting industrialisation and modernisation of the national economy. The country has made major strides in recent years with an overall increase in participation at the all levels of education. In particular, a rapid increase has occurred at the levels of teacher education, TVET and higher education, with annual growth rates of 32.5 per cent for teacher education, 18.1 per cent for TVET, 21.8 per cent for undergraduate and 26.1 per cent for postgraduate degree programmes in 2010/2011 (see Table 8.4). However, there is a concern that a fast expansion in enrolment may have a negative impact on educational quality, because teacher training cannot catch up with the pace of demand for teachers.[7] Such concern also puts pressure on policy-makers and the international community to improve teacher supply and teacher quality.

8.3.4 Need for quality teaching

Shortages of teachers and sub-optimal deployment of unqualified teachers are two of the major problems that affect the quality of education.[10] By 2010/11, only 47.2 per cent of primary school teachers had diploma qualifications, while 86.8 per cent of secondary school teachers had degree qualifications. The low percentage of qualified primary school teachers is due to the new requirement for primary teachers to have a diploma, not just a certificate[11] (see Table 8.5) (Ethiopian Ministry of Education, 2011). Nevertheless, this shows that the government needs to train more teachers and recruit more qualified teachers to meet its goals.

Table 8.4 Enrolment at all levels of education in Ethiopia (2006/07, 2010/11)

	1999 EC[8] (2006/07)		2003 EC (2010/11)		
Level	Enrolment	Net enrolment rate (%)	Enrolment	Net enrolment rate (%)	Average annual growth rate (%)
Kindergarten	219,068		382,741		15.0
Primary	14,014,276	79.1	16,718,111	85.3	1.9
1st cycle (1–4)	9,776,569	79.9	11,254,696	91.8	3.5
2nd cycle (5–8)	4,237,707	39.4	5,463,415	47.3	4.7
Secondary	1,398,881		1,750,134		
1st cycle (9–10)	1,223,662	14.7	1,461,918	16.3	2.6
2nd cycle (11–12)	175,219	3.0	288,216	4.2	8.8
Teacher education (dip. programme)	70,649[9]		164,501		32.5
TVET	191,151		371,347		18.1
Higher education (government and non-government)					
Undergraduate degree	203,399		447,693		21.8
Postgraduate degree	7,057		20,150		26.1

Source: Ethiopian Ministry of Education, 2011.

Table 8.5 The Education Sector Development Program IV (ESDP IV): Key quality indicators related to teachers

Indicators	Base year 2002 EC (2009/10)	Target for 2003 EC (2010/11)	Status of 2003 EC (2010/11)
% primary teachers with diploma qualification (grades 1–8)	38.40%	49.70%	47.20%
% secondary teachers with degree qualification (grades 9–12)	77.40%	83.60%	86.80%
Primary education (1–8) student/teacher ratio	51.0	55.6	51.0
Secondary education (9–10) student/teacher ratio	40.2	39.0	34.9
Secondary education (11–12) student/teacher ratio	25.3	24.8	26.1

Source: Ethiopian Ministry of Education, 2011.

Another quality indicator related to teachers is the student/teacher ratio, which was 51 to 1 for primary education, 34.9 to 1 for the first cycle of secondary education (grades 9–10) and 26 to 1 for the second cycle of secondary education (grades 11–12) in 2010/2011. These ratios are in the region of the targets set for that academic year. This reflects the government's efforts to increase the number of teachers in recent years.

8.3.5 Teaching force in Ethiopia

To meet the growing demand for education at all levels, the teaching force has also increased significantly. Between 2005/06 and 2009/10, the number of primary teachers increased significantly with an annual growth rate of over eight per cent. Large increases are also seen at the secondary, teacher education, TVET and higher education levels, with annual growth rates of 17 per cent, 26.2 per cent, 16.1 per cent and 20.1 per cent respectively (see Table 8.6).

However, these increases have not caught up with demand for teachers. For example, UIS (2011) estimates that in order to achieve universal primary education (UPE) with good quality by 2015, Ethiopia would still need to increase its teaching workforce by a total recruitment of 231,900 between 2009 and 2015 (see Table 8.7).

Table 8.6 Teacher stock for all levels of education

Year	1999 EC (2006/07)			2003 EC (2010/11)			Average annual growth rate		
Level	Male	Female	Total	Male	Female	Total	Male	Female	Total
Kindergarten	3,082	4,935	8,017	4,199	9,764	139,631	8.0%	18.6%	14.9%
Primary	142,941	82,378	225,319	193,599	114,687	308,286	7.9%	8.6%	8.2%
Secondary	25,095	3,088	28,183	43,041	9,690	52,731	14.4%	33.1%	17.0%
Teacher education[12]	678	94	772	1,792	165	1,957	27.5%	15.1%	26.2%
TVET	5,974	1,120	7,094	10,758	2,132	12,890	15.8%	17.5%	16.1%
Higher education			8,355	15,798	1,604	17,402	19.1%	33.8%	20.1%

Source: Ethiopian Ministry of Education, 2011.

Table 8.7 Demand for primary teachers

Teaching staff in 2009 (000s)	Teaching staff needed in 2015 (000s)	Absolute change in stock 2009–2015 (000s)	Average annual change	Total recruitment incl. attrition (000s)
234.2[13]	379.4	145.2	0.08370	231.9

Source: UIS, 2011.

8.4 Research questions

The paper aims to find out the situation of migrant teachers in Ethiopia, particularly the role of migrant teachers in complementing the government's effort to increase the teaching stock and to improve the quality of teaching in the country, as well as the current practices in recruitment processes and the status and working conditions of migrant teachers. We used the CTRP, as recognised by the international community as a benchmark in managing the recruitment of migrant teachers, to identify key questions to consider. We first attempted to determine the migrant teacher flow, and then the extent to which Ethiopia's teacher recruitment practices align with the standards proposed in the CTRP, before finally researching the government's longer-term plans for teacher development in the country. Specifically, the paper intends to seek answers to the following questions related to the need for teachers, with particular emphasis on expatriate tertiary level education teachers, as we found most migrant teachers are working at post-secondary level in Ethiopia:

A. How many expatriate teachers are there in Ethiopia?

B. What countries send teachers to Ethiopia?

C. How are expatriate teachers recruited?

D. What qualifications are required of expatriate teachers in Ethiopia?

E. What types of benefits do expatriate teachers receive?

F. What subjects do expatriate teachers teach?

G. What future plans are there for teacher recruitment to Ethiopia?

8.5 Methodology

Data and information were gathered through document analysis, interviews and follow-up visits. The documents analysed included education policy documents; Ministry of Education reports and statistical bulletins; the CTRP; and studies on teacher demand and supply, teacher migration and recruitment. The interview respondents comprised key officials within the Ethiopian Ministry of Education. Education statistics were not always

readily available for a number of questions. However, the various sources of information used in this case study ensured triangulation, and are believed to help improve the understanding of teacher mobility and migration in the Ethiopian context.

8.6 Findings

The short-term response to a shortage of teachers of recruiting foreign teachers can ensure that every classroom has a teacher. The benefit expatriate teachers can bring is not only to teach in the classroom, but also to coach and train local teachers through on-the-job training and organisation of workshops. However, short-term measures raise concerns about their impact on the quality of teaching and learning. Many countries, including Ethiopia, have chosen to recruit large numbers of teachers on a contract basis. The idea is to keep the wage bill down, while increasing access to education. Many of the new recruits, however, are not fully trained, as described above in paragraph 8.3.4. According to the government, compared with 'regular' civil service teachers, contract teachers often have: i) relatively lower academic credentials; ii) uncertain or no career prospects; and iii) lower salaries and fewer benefits. Contract teachers and alternative basic education (ABE) facilitators have less training (i.e. they are unqualified) and at some places lower salaries.

A. How many expatriate teachers are there in Ethiopia?

According to government statistics, there were a total of 654 expatriate teachers at the higher education level in Ethiopia in 2010–2011, which was 3.76 per cent of the total academic staff. This is a significant reduction from the previous year, which was 978 expatriate teachers, representing 6.23 per cent of the total academic staff. The majority of expatriate teachers are employed by the government sector (91 per cent) rather than the private sector. There are also expatriate teachers recruited by Ethiopia deployed at the TVET level.[14] Table 8.8 presents the number of Ethiopian and expatriate academic staff in higher education in recent years.

B. What countries send teachers to Ethiopia?

According to the central government source, the main countries that send teachers to work in Ethiopia are China, Cuba, Germany, India and the Philippines. Other suppliers include Japan, Nigeria and the United Kingdom, but to a smaller extent. This does not include all the volunteers or teachers recruited independently by some of the institutions.

Table 8.8 Trend of academic staff in higher education institutions (HEIs) in regular programme and percentage of females (2006/07–2010/11)

		Ethiopian		Expatriate		Total		
Year		Total	% female	Total	% female	Total	% female	% expat.
1999 EC (2006–07)	Public	n/a	n/a	n/a	n/a	1,916	n/a	n/a
	Private	n/a	n/a	n/a	n/a	651	13.5	n/a
	Total	n/a	n/a	n/a	n/a	n/a	n/a	n/a
2000 EC (2007–08)	Public	n/a	n/a	n/a	n/a	n/a	n/a	n/a
	Private	n/a	n/a	n/a	n/a	651	n/a	n/a
	Total	n/a	n/a	n/a	n/a	6,439	n/a	n/a
2001 EC (2008–09)	Public	8,841	8.4	655	16.2	9,496	9.0	6.90
	Private	1,504	15.4	28	14.3	1,532	15.4	1.83
	Total	10,345	9.4	683	16.1	11,028	9.8	6.19
2002 EC (2009–10)	Public	13,176	11.1	950	13.3	14,126	11.3	6.73
	Private	1,553	12.0	28	42.9	1,581	12.6	1.77
	Total	14,729	11.2	978	14.1	15,707	11.4	6.23
2003 EC (2010–11)	Public	15,255	8.4	631	17.4	15,886	8.8	3.97
	Private	1,493	13.1	23	56.5	1,516	13.7	1.52
	Total	16,748	8.8	654	18.8	17,402	9.2	3.76

Source: Ethiopian Ministry of Education, 2011. Re-tabulated by the author.

C. How are expatriate teachers recruited?

The process of selecting, contracting and deploying teachers is dependent on the agreements between Ethiopia and the supplying country. In India, the Ethiopian Ministry of Education (MoE) recruits Indian teachers using the services of a teacher placement agency and assigns them to teach at the tertiary level. Assessment of teacher qualifications and certification is completed by the placement agency. Candidates who meet the criteria are then placed in Ethiopian institutions of higher education.

In the case of teachers from Germany, the Ethiopian MoE recruits from a shortlist of candidates supplied by Germany. These preselected candidates possess the minimum qualifications required by Ethiopia to teach within the country.

Another recruitment process undertaken by Ethiopia is the use of its foreign embassies to make initial contact with teacher institutions and to advertise teaching positions abroad for Ethiopia. In this way, the Ethiopian embassy acts as a mediator, identifying potential teacher sources and facilitating the recruiting process. For example, this process is used by Ethiopia to recruit teachers from Cuba.

Another recruitment strategy is to establish a bid process for recruitment agencies that wish to send teachers to Ethiopia. The ministry assesses service providers and selects a partner agency based on criteria that meet its teacher needs and budget. It is not uncommon for the ministry to send an evaluation team to review candidates that have been selected by the recruitment agency. This team usually consists of university faculty and administrators. The idea of using a recruitment agency is to facilitate the process of recruitment, thus alleviating the burden on the government. To achieve this, recruitment agencies must work efficiently, but there is little information available on how effectively recruitment agencies are contributing to this goal.

D. What qualifications are required of expatriate teachers in Ethiopia?

In its narrowest terms, the recognition of qualifications can be defined as 'formal acknowledgement of … individual academic or professional qualifications' (UNESCO-CEPES, 2007: 8).[15] This process has traditionally been most challenging in relation to professional fields. The teaching profession is no exception. According to the ministry, expatriate teachers must possess a graduate degree in order to teach at all levels of education. A PhD or equivalent degree is usually required for teachers who are placed at the tertiary level of education. To ensure that the credentials of candidates meet Ethiopia's teaching qualifications standards, evaluations are conducted by an Ethiopian team of education administrators or by the recruitment agency in order to review and validate applications. In order to accelerate the recruitment effort, it is important that the evaluation must be carried out efficiently as well as effectively; however, often the process is long and slow.

E. What types of benefits do expatriate teachers receive?

Expatriate teachers' salaries and benefits are established in a contract agreement called the 'Contract of Employment for Expatriate Staff'. This document lays down the details of employment such as: title of position, duty station, duration of employment, salary, sick leave, travel allowance and other benefits. The duration of the contract is two years, and may be renewed as necessary.

According to the ministry, the standard salary of expatriate teachers who possess a first graduate (at least master's) degree is US$1,100 per month. Expatriate teachers are provided an allowance for travel and accommodation. For example, if housing is not provided by the institution where the teacher is stationed, the Ethiopian government provides a housing allowance of US$175 per month as part of their salary structure.

In some cases, the teacher's home country will pay their salary instead of the Ethiopian government. This is the case for some teachers from Germany and the United Kingdom. The British Council also provides housing and allowance for teachers based in Ethiopia.

F. What subjects do expatriate teachers teach?

Recent education policies in Ethiopia have placed a strong emphasis on the teaching and learning of mathematics, science and technology. According to the ministry, Ethiopia only recruits teachers for these underserved fields of education. In addition, countries may be targeted for the recruitment of teachers for a particular field. Chinese, German and Indian teachers are frequently recruited to teach in the areas of TVET and information and communication technology (ICT). Japanese teachers teach science and mathematics at the primary level, and teachers from the Philippines often fill positions teaching medicine and social sciences at TVET.

G. What future plans are there for teacher recruitment to Ethiopia?

The long-term goal of the Ethiopian education system is to increase its teacher supply in order to be sustainable and self-sufficient, and to align it with the country's economic and social development. In the meantime, the country will continue to recruit expatriate teachers to supplement teacher shortages.

The government also plans to increase its recruitment of teachers from other African countries. In particular, the government would like to recruit English teachers from Anglophone African countries. Initial discussions with Ghana, Kenya, Uganda and Zimbabwe are underway. Teachers recruited from these countries would be deployed to teach English, particularly at the secondary level of education. The ministry also hopes to establish a type of 'training of trainers' programme in which expatriate teachers would act as teacher mentors for Ethiopian staff. This task requires an intensive effort to strengthen communication between relevant agencies and departments, because it involves different components such as curriculum, procurement, policy, planning and the Teacher Development Programme (TDP).

8.7 Analysis

This section analyses the extent to which Ethiopia's teacher recruitment practices align with the standards mandated in the CTRP. The fair and ethical treatment in the international recruitment of teachers is an important cornerstone of the CTRP. Ethiopia can serve as a relevant model for other African countries in terms of the effective and ethical recruitment of expatriate teachers.

> *Recruiting and source countries should agree on mutually acceptable measures to mitigate any harmful impact of such recruitment* (Commonwealth Secretariat, 2004: 9).

Ethiopia's recruitment practices are, to a large extent, highly transparent. Through communication and partnership with embassies and recruitment agencies, the supply of and demand for teachers are fairly assessed by both parties, thus allowing source countries and Ethiopia to agree on mutually acceptable measures for recruitment.

> *The government of any country which makes use of the services of a recruiting agency, directly or otherwise, shall develop and maintain a quality assurance system to ensure adherence to this Protocol and fair labour practices* (Commonwealth Secretariat, 2004: 11).

The existence of an Ethiopian evaluation team that assesses expatriate teacher credentials before they are deployed acts as a quality assurance system. Furthermore, the establishment of a formal employment contract between the Ethiopian ministry and expatriate teachers serves as another mechanism that clearly outlines employment standards and benefits.

> *Whenever appointed, recruited teachers shall enjoy employment conditions not less than those of nationals of similar status and occupying similar positions* (Commonwealth Secretariat, 2004: 12).

The majority of Ethiopia's expatriate teachers are recruited to teaching positions in institutions of higher education. Their employment conditions are similar to those of local staff. According to the ministry, expatriate teachers – like local staff – are permitted to serve in leadership positions at universities, for example.

> *Recruited teachers should be employed by a school or educational authority* (Commonwealth Secretariat, 2004: 12).

The recruitment of expatriate teachers by Ethiopia follows the supply of and demand for teachers in its education system. Recruited teachers are either recruited directly by universities or by the ministry on behalf of education institutions. Thus, these teachers are employed by a school or educational authority, demonstrating Ethiopia's alignment with the CTRP.

> *The recruited teacher has the right to transparency and full information regarding the contract of appointment. The minimum required information includes information regarding complaints procedures* (Commonwealth Secretariat, 2004: 16).

Although teachers are provided with a contract agreement that outlines terms of employment, information regarding complaints procedures is noticeably absent. In the contract's termination clause, it simply states that 'this contract may be terminated at any time, and for no cause, by giving three months' notice to the other party'. The teacher's salary is paid in full up to the date of termination.

8.8 Conclusion

The major foci of the study were the need for teachers, and how teacher migration can be seen as a short-term response to fill the resultant gap in the teaching force. The study also looked at teacher recruitment: its practice, challenges and areas of improvement necessary to lead to a longer-term solution. In particular, the study used the CTRP as a possible tool to guide a future international teacher recruitment policy, by examining how current practices are aligned with the recommendations and principles set by the CTRP and identifying areas for further improvement.

As can be seen in the above analysis, Ethiopia's teacher recruitment practices generally align with the standards mandated in the CTRP. However, the recruitment process needs to be guided by a comprehensible and clear course of action. For this to happen, a formal policy for international teacher recruitment is required, and this policy should address issues related to the recruitment process such as migration, teacher development, financing of teacher training, quality assurance and recognition of qualifications. One of the first clear courses of action would be the improvement of communication between the Ministry of Education and universities and other levels of schools in order to manage data on the number of foreign teachers recruited at the institutional level and their countries of origin; the number of teachers who migrate to other countries and their destinations and subjects; and the sharing of other relevant information at the national level, including among different components of the education system such as curriculum and the TDP. Second, reliable data on teacher mobility and recruitment should be available through improved communication. Third, in order for the policy to be implemented effectively, advocacy and capacity building of relevant stakeholders is indispensable, including government and recruiters, as well as agencies responsible for accreditation and quality assurance and, in some cases, employers.

Another important aspect, not covered in this study, is assessment of the effectiveness of these international teaching staff. One possible question we need to ask is whether the students understand migrant teachers and are satisfied with their teaching, and if there is any evidence of improvement of learning because of migrant teachers. Such assessment should examine if the methods used by migrant teachers are adequate for Ethiopian students. If any modifications are required, the assessment should identify some options on how the government and migrant teachers should respond.

Ideally, any country should be able to produce the necessary number of quality teachers within the country itself. However, due to the economic, political and social challenges that many countries face, migrant teachers are in fact playing an important role in the response to the urgent need for teachers to fill the teacher gap overseas. In particular, when some countries are over-producing teachers and other countries are experiencing a severe teacher shortage, a short-term solution of recruiting international teachers is a rationale response.

The next step to consider is sustainability. In recent years, Ethiopia has increased the capacity of all levels of education, especially teacher training institutions, TVET and higher education. This indicates that the government is moving to the right direction to meet the demand for teachers. The declining proportion of expatriate teachers at the higher education level is another indication that the government is increasing the national capacity. This is a natural response considering the growing school-age population. The growing capacity of the education system is good news, and at the same time it is a big concern in terms of readiness of teachers and students in a rapidly changing new environment.

This study aimed to address the issue of teacher migration. The authors hope to shed light on key factors to consider for future planning of teacher development in Ethiopia, which needs to find the right balance between the pace of expansion of the education system, preparing teachers domestically and recruiting teachers from overseas, and also preparing students to be able to learn at the right level and preparing them to succeed in the world of work and become responsible citizens.

Notes

1 The authors, from the Ethiopian Ministry of Education and UNESCO-IICBA, appreciate the opportunity to participate in the research symposium on teacher mobility, recruitment and migration, extended by the Commonwealth Secretariat. We also thank Ato Getachew Tadesse, colleague of Ato Theodros, and Ato Fuad Ibrahim, State Minister of Education, Ethiopia for their invaluable inputs for this paper.

2 The entrance age of primary education is seven, however the UN has historical statistics available only for the age group of five to 14, which includes two years of pre-primary and the primary education population.

3 Population figure for 2010–2015 is a projection.

4 The exchange rate of US$1 is 16.76 Ethiopian Birr as of 24 May 2011. (www.oanda.com/currency/converter/).

5 Sources: OECD's Development Assistance Committee (DAC) database and World Bank for PPP$, cited in UIS, 2011.

6 For the moment within the World Bank-financed General Education Quality Improvement Programme (GEQIP), its mandates are extended to promote faster expenditure of money and reallocation of unspent money.

7 The trade-off between enrolment and learning levels has been an ongoing debate, not only because of increased teacher/pupil ratio, but also the new entrants' socio-economic background being associated with lower achievements, such as poverty, poor nutrition and low parental education level. However, many international studies have been inconclusive on this link between sharp increase in enrolment and quality of education (UNESCO, 2011).

8 EC = Ethiopian Calendar; GC = Gregorian Calendar.

9 The figure of teacher education enrolment is that of 2007/08.

10 In addition to the shortage of qualified teachers, other major problems affecting quality of education are related to: the continuous professional development (CPD) programme, such as lack of teachers' capacity in developing their own needs; and lack of access to adequate teaching and learning materials in rural areas.

11 Primary education (Grades 1–8) now requires teachers with a minimum qualification of a diploma from a college of teacher education (CTE). From the year 2002 EC (2009/10 GC), teachers with teacher training institution (TTI) certificates are no longer considered as qualified teachers for the first cycle (grades 1–4) of primary education (Ethiopian Ministry of Education, 2010).

12 The figures in the 1999 EC column are from 2001 EC (2008/09 GC).

13 The teacher stock number in UIS is slightly different from that of the government's figure. This is probably due to the timing of the reporting.

14 The *Education Statistics Annual Abstract 2003 EC/2010-11* GC includes expatriate teacher data only at the higher education level, but other levels are not significant in number and are not included in the document.

15 For further information on recognition of qualifications between countries, see UNESCO's Conventions on the Recognition of Qualifications, available at: http://portal.unesco.org/education/en/ev.php-URL_ID=13880&URL_DO=DO_TOPIC&URL_SECTION=201.html (accessed 21 May 2012).

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9. Zimbabwean education professionals in South Africa: Motives for migration

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Abstract

Interest in South–North teacher migration has yielded a substantial corpus of literature on the motives for teacher migration and teachers' experiences in host countries. This article focuses on South Africa (SA) as a receiving country for migrant teachers, in particular Zimbabweans, a perspective not previously explored in studies. It examines the push factors responsible for the migration of Zimbabwean education professionals to SA. The article draws from an ethnographic study undertaken in 2011 to understand the nature of Zimbabwean education professionals' migration to SA and their experiences in the host country. The data is sourced from 13 semi-structured interviews with Zimbabwean education professionals located in the province of Kwa Zulu-Natal in SA. The findings illuminate two cohorts of migrant education professionals in the sample: teachers and lecturers. They were exiting Zimbabwe for multiple, interrelated reasons. The reasons articulated by participants for their migration included the economic situation in Zimbabwe, coupled with the current political climate. Collectively, this negatively influenced the education opportunities available to Zimbabwean education professionals. This paper highlights human vulnerability as Zimbabwean education professionals attempt to survive by pursuing work opportunities in SA. The article concludes with some suggestions for critical education stakeholders in SA. Furthermore, the author argues for the need to provide support to Zimbabwean education professionals, who could assist in addressing immediate labour shortages that exist in SA education.

Key words
Zimbabwean Education Professionals, Migration, South Africa

9.1 Introduction

Concern about the migration of teachers from small states and countries in the South, which could ill-afford to lose their human resources, to countries in the North led to various Commonwealth initiatives such as a teacher recruitment protocol and symposia to manage teacher migration. Within this framework, South Africa (SA) has been perceived as a sending country and the United Kingdom (UK) as a receiving country. This article focuses on SA as a receiving country for migrant education professionals, a dimension previously absent from teacher migration literature. In particular, there has not been a rigorous in-depth study undertaken to unpack the migration of Zimbabwean education professionals to SA.

This article utilises data from a larger ethnographic study that was undertaken in 2011 on Zimbabwean education professionals in Kwa Zulu-Natal (KZN) (a coastal province in SA) who migrated to SA post-2000. The unit of analysis is Zimbabwean education professionals. Whilst the study seeks to understand the motives and nature of Zimbabwean education professionals' migration to SA and experiences in the host country, this article focuses solely on the reasons for the migration of Zimbabwean education professionals to SA. The study, in its entirety, thus contributes to the current body of knowledge on Zimbabwean migrants in SA. This article, consisting of three sections, has the following structure. The first section embarks on an examination of the

limited literature on South–South teacher migration in Africa and SA's attraction. The second section outlines the methodology used in the study, while the next section explores the push factors driving education professionals from Zimbabwe to SA. The article concludes with some suggestions for the South African national Department of Education and policy-makers in addressing Zimbabwean education professionals' migration to SA.

9.2 Literature review

The migration of teachers from Commonwealth countries in the South to countries in the North captured sufficient attention to warrant the development of a Commonwealth Teacher Recruitment Protocol (Commonwealth Secretariat, 2004) and the 2010 emergence of the Commonwealth Advisory Council on Teacher Mobility, Recruitment and Migration. This trend was typified by teachers leaving developing countries such as the Caribbean, the Philippines and SA to pursue better opportunities in developed countries such as the UK and US. Laws (1997) has argued that people mostly migrate in search of economic opportunities (e.g. work). Increased economic globalisation has created attractive work opportunities abroad, which influence people to cross international boundaries. In the present global economy, some countries function as labour exporting nodes for long- or short-term migrants and others act as labour-importing countries. Morgan, Sives and Appleton (2006) identified SA as a sending country, with teachers migrating to the United Kingdom (UK). By contrast, Manik (2005) has suggested a circular and serial migration for the same SA–UK trend. Halfacree (2004: 239) has also called for 'a greater appreciation of non-economic issues' that impact on migrant behaviour. He is of the opinion that the complexities of migration should be under scrutiny in research. Lawson (1999) similarly argues that migration literature focuses on economics and thus has a tendency to eclipse other factors of influence in the decision-making process. Teacher migration studies in the context of SA have indicated multiple motives for exiting SA to teach abroad. These included finance, opportunities to travel and professional development (Manik, 2005; Morgan *et al.*, 2006). In addition, teachers had a desire for upward mobility and to escape poor leadership and management in selected public schools (Manik, 2005, 2010).[1]

9.2.1 South–South teacher migration

However, the South–South migration of teachers did not garner much international interest until recently, with the Sixth Commonwealth Research Symposium on Teacher Mobility, Recruitment and Migration focusing on Africa and the experiences of refugee teachers. Morgan *et al.* (2006) acknowledge Botswana as a receiving country of migrant teachers, with the Teacher Service Management (TSM) in the Ministry of Education being responsible for the recruitment and placement of all teachers, including migrant teachers.[2] Morgan *et al.* (2006) cite TSM statistics as at June 2004, which reveal that Botswana had 1,046 migrant teachers coming from 36 countries in total. The greatest numbers of migrant teachers in Botswana were from developing countries[3] such as Zambia (274), followed by India (138) and Zimbabwe (132). These teachers were located in secondary schools in pre-vocational subjects that had been newly introduced into the curriculum such as business studies, commerce, art and computer science. Their study indicated that a number of teachers were located in private schools and that there are numerous applications from Zimbabwean teachers. They also noted 'the problems of attracting teachers to remote, rural areas' despite TSM's policy on the recruitment and placement of teachers (Morgan *et al.*, 2006: 78). Their study of 382 migrant teachers revealed a higher percentage of male migrant teachers than female migrant teachers were coming from Zambia, Zimbabwe, India and Uganda, with the majority of teachers (85 per cent) being married. In government schools, the average age of teachers was 42 years, while in the private sector they were younger (35 years).

While there were some similarities in respect of the nature of teacher migration in sub-Saharan countries, there appear to be some differences when compared to studies undertaken of South–North teacher migration. Teachers indicated that the most important reason for migration (South–South) was a higher salary (Morgan *et al.*,

2006). Other reasons included better working conditions and professional development. These reasons were common to the findings of other South–North studies (Manik, 2005). An interesting finding, not foregrounded as an imperative to leave but as an experience abroad in South–North teacher migration (Manik, 2005), was that of a safer environment. Safety was provided as a reason by migrant teachers from Zimbabwe, Zambia, Malawi and Kenya in Morgan *et al.*'s study (2006: 90). They cite a Zimbabwean teacher who reveals: 'The environment is peaceful, one is free to express oneself without any harassment from the powers that be'. Kenyan teachers similarly noted the importance of peace and push factors such as 'corruption, civil war and internal problems in developing countries'.

9.2.2 Zimbabwean migration to South Africa: migrant characteristics and experiences

Cohen (1997: 1–4), working on the green paper for international migration in the context of SA, acknowledges that migration has taken new forms since 1970. He draws attention to six forms of international migration among which is 'refugee migration'. He suggests that this category refers to people who were forced to flee and hence it falls within the scope of involuntary or forced migration. These migrants are driven by the threat of persecution or political opinion. Cohen (1997) further distinguishes between an asylum-seeker and a displaced person. The asylum-seeker requests to be seen as a refugee but has not been confirmed, while the displaced person has had to flee as a result of war (including civil) or natural disaster. The other categories can be viewed as voluntary migrations. However, Eklund (2000: 7) maintains the view that 'it is not easy to distinguish between voluntary and involuntary migration'. How education professionals express their reasons for leaving Zimbabwe sheds light on whether they see their migration as voluntary or otherwise.

An interesting perspective and analytical lens on refugee migration in the developing world has come from work undertaken by Betts. He concedes that he is not 'an expert on teacher migration' (2010: 26), nor has he conducted any research on teacher migration but rather on international migration and its impact on the developing world, which has some interesting insights on 'survival migration'. Betts explains the concept of survival migration as focusing on:

> the situation of people who are outside their country of origin because of an existential threat to which they have no access to a domestic remedy – but who fall outside of the dominant interpretation of a 'refugee' under international law (2010: 26).

This definition encompasses people who have traversed national borders escaping the following: disaster of an environmental nature; a collapse in terms of their livelihood; or the frailty of a nation state. He notes the flight of Zimbabweans to SA as survival migration. He denounces state and international institutions' reliance on the 'economic migrant/refugee dichotomy' (2010: 27). Sisulu, Moyo and Tshuma (2007: 552) reveal that after March 2005, Zimbabwean politics exacerbated the socio-economic situation in the country. They argue that both observers and the opposition party noted a lack of 'freedom and fairness' in the parliamentary elections held at this time and this intensified the political crisis in Zimbabwe. Operation Murambatsvina in May 2005 was a campaign to 'clean up' the cities of Zimbabwe by enforcing bylaws, removing illegal traders and illegal settlements (Solidarity Peace Trust, 2010), but it extended to peri-urban and rural areas (Sisulu *et al.*, 2007). The UN report on this campaign confirmed that Zimbabwe was facing a humanitarian crisis with an overwhelming number of people (700,000) not having access to shelter, food, water, sanitation, healthcare and disruptions in their education. Indeed, the socio-economic and political events led Sisulu *et al.* (2007) to debate whether Zimbabweans in SA are economic migrants or political refugees. This remains a current debate. For example, scholars at a conference held in June 2008, which was sponsored by the Nordic Africa Institute, the Swedish International Development Co-operation Agency and the University of the Witwatersrand in South Africa, on the Zimbabwean diaspora highlighted key concepts and experiences related to the Zimbabwean crisis. In the discussions, they deliberated on the categories of economic migrant and refugee (Hammar, McGregor and Landau, 2010).[4]

Betts (2010) also provides conceptual clarity for the terms 'survival migration', 'refugees' and 'international migration'. He explains that refugees are survival migrants, but not all survival migrants are refugees; survival migrants are international migrants, but not all international migrants are survival migrants. Betts (2010) reveals that in his project, there were some issues that surfaced relating to teacher mobility that require development. For example, there were qualified teachers in the survival migrant population, namely Zimbabweans and Somalis in SA, Botswana and Kenya. Sisulu *et al.* explain that Zimbabweans 'have the unenviable distinction of having the fastest shrinking economy, the highest rate of inflation and the lowest life expectancy in the world' (2007: 533). They explain that because of the difficult conditions, Zimbabweans have been leaving particularly for SA. They note that many qualified professionals such as nurses, teachers, pharmacists and doctors go to the UK and SA, but SA attracts both skilled and unskilled migrants. They are of the opinion that different groups of migrants leave for different reasons, stating that prior to 2005, doctors, nurses and pharmacists left for economic reasons while teachers, journalists and the youth left for political reasons.

Betts also noted that:

> there was an absence of formal opportunities for teachers in destination countries … with little thought about how they could be brought into the labour market and informal teaching taking place without support from the state and international organisations (2010: 29).

He cites, among other examples, Zimbabwean teachers in the Central Methodist Church in Johannesburg teaching Zimbabwean migrants in unhygienic conditions. Sisulu *et al.* similarly note that 'life is not as good as expected in SA, citing xenophobia, discrimination, police harassment, unemployment and a lack of basic services' 2007: 533). They berate the SA government for not acknowledging the extent of the crisis in Zimbabwe and responding to it. While Betts (2010) claims that his work does not constitute in-depth research, he does provide some interesting recommendations to the Commonwealth Advisory Council on Teacher Mobility, Recruitment and Migration. These include: 'the recognition of survival migration in teacher mobility, moving beyond the dichotomy of forced/voluntary migration and the identification of labour market opportunities for refugee teachers' (Betts, 2010: 29).

There has been a plethora of studies undertaken in SA highlighting the plight of Zimbabweans eager to earn a living (Rutherford, 2010), as there are large numbers of Zimbabweans in Gauteng, Limpopo, KZN and Western Cape (Sisulu *et al.*, 2007). However, these studies have been limited to unskilled migrants such as farm workers or skilled migrants such as doctors and nurses. Thus there is a dearth of research unpacking SA as a receiving country for migrant teachers. There has been little research and mostly anecdotal information on Zimbabwean teachers in SA (Sisulu *et al.*, 2007). Sisulu *et al.* (2007: 556) assume that the same reasons that health professionals provide for exiting Zimbabwe, namely economic, political, professional and educational, apply to teachers. Sisulu *et al.* (2007: 556) cite the Reverend Nicholas Mukaronda (2005), who prepared a report for the Solidarity Peace Trust saying that teachers are targeted for political violence as they are seen to be 'torch bearers for the opposition MDC'.

Zimbabwean teachers in SA are in extremely exploitative circumstances in private schools and colleges, either as a result of not being paid or receiving low salaries with little recourse for legal action as they lack legal status. They are 'occupying menial jobs, unemployed and destitute' (Sisulu *et al.*, 2007: 556). The interim chairperson of the Progressive Teachers' Union of Zimbabwe (PTUZ) in SA stated in 2006 that an average of 4,000 teachers had left Zimbabwe per annum since 2000 and that the majority were in SA. That implies that there could be a significant number of Zimbabwean teachers in SA, but thus far there are no means of ascertaining the exact number. By contrast, the South African Qualifications Authority (SAQA, 2008, cited in Manik, 2009) does acknowledge that there are in excess of 1,000 Zimbabwean qualified teachers in SA, counting as the largest cohort of foreign teachers.

9.3 Methodology of study

The study sought to unpack a demographic profile of education professionals, the reasons for leaving Zimbabwe and migrating to SA, their personal and professional experiences in the host country and the duration of their stay. This article addresses two key areas of the study. It first provides a demographic profile of the migrant education professionals that participated in the study. It thereafter focuses on one of the critical questions of the study, namely: why are education professionals leaving Zimbabwe?

All participants were interviewed while they were in SA post-migration. The absence of a database of foreign migrant teachers coupled with a lack of knowledge on where they live or work made it impossible to locate a representative sample. The expense and difficulty of locating education professionals within the entire KZN province meant that the study was limited to three areas: Durban, Pietermaritzburg and Jozini. The first two are cities in KZN and Sisulu *et al.* (2007) have noted that Zimbabwean professionals tend to be located in urban hubs. Two sampling strategies were used: first, a form of purposive sampling, snowball sampling, where interviewees were asked to identify further likely respondents, was used with initial participants being drawn from a multi-site university in KZN and from a church in Durban that provides support to refugees. Second, to prevent a skewed sample, a fieldworker was sent to visit schools in Jozini, which is in rural KZN, to elicit the contact details of willing participants as anecdotal evidence indicated that many foreign teachers were holding teaching positions in rural areas. All participants were given pseudonyms and interviewed either face-to-face or through telephonic semi-structured interviews (n=13) by the researcher. The average duration per interview was an hour. Data gathered from the interviews were triangulated with data from a semi-structured interview and iterative dialogue with the Co-ordinator of the Refugee Council in Durban, KZN.

9.4 Findings of study

The biographic profile of the migrant education professionals interviewed (n=13) is as follows. There were eight males and five females. Eleven of the participants were married, one was widowed and one was divorced. The mean age of participants was 35 years. For the majority of participants (n=8), migrating to SA was their first migration experience, their having not previously emigrated from Zimbabwe. In respect of the minority (n=5) who had previously migrated, their destination had been other African countries close to Zimbabwe.

The professional profile of the participants is as follows. One participant had a PhD, six had master's degrees, two had honours degrees, two had Diplomas in Education, one had a Bachelor of Education (BEd) degree and one had been studying towards a BEd degree. There were two cohorts of education professionals in the sample: teachers and lecturers. However, these were not mutually exclusive categories since some participants had migrated to SA to teach, but after a period of time they accepted academic positions as tutors or lecturers in higher education institutions. At the time of the interviews, five of the participants were teachers and eight were lecturers. Four of the five teachers were maths and physical science specialists, while six of the eight lecturers were education specialists.

9.4.1 Motives for education professionals leaving Zimbabwe

The education professionals (both cohorts) were exiting Zimbabwe for multiple, interrelated reasons. The most frequent push factors were the economic situation in Zimbabwe coupled with the current political climate. The impact of the stated factors influenced education. Hence, a lack of education opportunities was also revealed as a reason for exiting Zimbabwe.

9.4.2 The political push

With regards to the politics, there were participants who revealed that being a teacher and involved with the opposition party (MDC) was not tolerated, as education is controlled by

the Zimbabwe African National Union Patriotic Front (ZANU PF) and such teachers were asked to resign. Oden explained that 'Being a teacher, a civil servant and an activist, I was asked to resign. Education is controlled by the government. The district administration asked me to resign because of my involvement in politics. I am an opposition activist … I tried to go into business, but the economy has declined and businesses were closing down'.

Dan also alluded to this as a reason for exiting, stating that there is a view in Zimbabwe that 'teachers are connected to the opposition party', and this has a negative impact for teachers in Zimbabwe. Theresa similarly explains that although politics was not the only reason for exiting, she had decided to leave after her experience following the elections and teacher strikes of 2006–2007. She explained: 'The teachers assist in the elections. When the opposition wins that district, then it becomes a problem. There are people sent by ZANU PF who come to the school and to your home at night. I went through that experience one time and I decided to leave before they came the second time. I didn't resign, I just told the principal I was leaving'.

The above articulations are not new, or limited to Zimbabwe, with the Education For All (EFA) Global Monitoring Report (GMR) (UNESCO, 2011) reporting that attacks on schools, teachers and pupils are not unusual. The report documents such occurrences in Gaza, three southern states of Thailand, Afghanistan and Pakistan. The EFA GMR chronicles incidents causing 'physical injury, psychological trauma and … the breakdown of family and community life…' (UNESCO, 2011: 27).

9.4.3 The economic push

Participant Rodney stated that both politics and economics were equally responsible for his decision to migrate. He explained, 'I was actively involved in the politics and economically – I couldn't look after my family'. Rodney's articulations are in keeping with what Kriger has stated in that many Zimbabweans are 'looking to find work to help their families at home to survive' (2010: 77).

Thus while some migrants perceived themselves to be escaping political persecution, there were others that saw themselves as economic refugees/migrants, omitting a political motive to their migration. However, in the interviews they did explain that the politics has destroyed the economy in Zimbabwe, leading to their flight. For example, Lewis says: 'I'm not a refugee by definition. I wasn't really escaping the politics. It's the economy of Zimbabwe: I can't do a PhD there, I can't get employment. I put myself into the category of economic migrant. I will go anywhere where there is a permanent job. The economic meltdown in Zimbabwe is something so bad that it has separated families'.

Scott also tries to define himself by saying: 'You could classify me as an economic refugee ... to keep my lifestyle, to advance myself education wise, for better prospects'.

It is interesting that the migrants appear to be struggling with finding the appropriate nomenclature to explain their migration to SA. The way in which they articulated their migration appears to be linked to their means of entry, as some had applied for asylum, as it is free and a work permit is costly, while others had initially come on a visitor's visa and then applied for a work/student permit. Indeed, Betts' (2010) definition of survival migration in this context appears to have currency for its applicability.

In respect of the economic climate in Zimbabwe, participants revealed that inflation was high, salaries were too low for a family to survive on, some were working without being paid a salary, and even when there was adequate money in terms of the salary, the shops did not stock essential merchandise for daily needs. This is in keeping with previous findings that migration behaviour is determined by 'economic factors such as employment and income' (Dodson, 2002: 71). Participants articulated their migration to SA as further outlined below.

Morgan came to SA to study due to the economics and politics: 'The situation was getting bad ... high inflation. I didn't mind resigning (from a teaching job) because working was whiling away time'.

Dianah left Zimbabwe to join her husband, who had accepted a job offer to teach maths and science at a university in KZN. She wanted also to enter the SA job market, as she was a physical science teacher. Reedi similarly explained that: 'The situation wasn't good for me, I needed to join my husband who was working in SA and especially the salary we were getting was too little... just imagine a family person earning US$100 per month'. Irene also articulated as one of her reasons for exiting Zimbabwe that she was not being paid what she deserved for her qualifications. Her articulations reveal 'relative deprivation', which is a facet of the theory of cumulative causation (Massey *et al.*, 1998), as she was aware through her husband (who is also located in education) that salaries are higher in SA.

Poor salaries and the repercussions thereof are a key incentive for migration, as Cody noted: 'The salaries in Zimbabwe are too low, I wasn't paid for three months, I couldn't afford my transport to work and I was trying to survive'.

In fact, many of the participants interviewed are not simply making decisions based on the present, but also how they view the future of Zimbabwe economically. John said: 'Teachers are not paid well and the economy is not promising'. Problems in the Zimbabwean economy surface in tangible ways, as Scott articulates: 'The meltdown in the economics; I'd have the money, but I'd go to the shop and nothing would be there. Also better prospects to advance myself education wise'.

9.4.4 A desire for educational advancement

There were also limited opportunities for further study in Zimbabwe. Seeking higher education was perceived as possibly leading to improved job prospects. For example, Lewis stated that his desire was: 'to study and seek employment'. Similarly Irene said: 'It was the economics and I wanted to do a Cambridge course, which was only available in SA'.

In fact, Sisulu *et al.* (2007) have revealed that two-thirds of the faculty of a dominant tertiary institution – the University of Zimbabwe – has been lost to migration. It is therefore understandable that Tanya says that as a student she exited to do a PhD (study). She was working for a government university and they did not have a PhD programme.

What is evident is that the politics has had a ripple effect on education in Zimbabwe. At times this link is direct. Cody was a political activist for the opposition party in Zimbabwe, and states that the politics prevented him from pursuing his studies: 'If you're in the opposition, they will chase you down; it's not conducive to studying, I couldn't complete my degree there'.

When asked if their migration to SA was temporary or permanent, a majority of migrants shared the same view of it being a temporary strategy. Two were not sure, but this could be because they had been in SA for just a few months. Four stated that the move to SA was permanent (one migrant was studying towards a PhD and one had a long-term contract of three years, but was still not permanent). Five migrants stated that it was a temporary migration because they had immediate family who remained in Zimbabwe and they were waiting for political and economic stability. In fact 'waiting for when things get better' in Zimbabwe appeared to be a common response by migrants.

9.5 Discussion and conclusion

As Sisulu *et al.* (2007: 552) have contended, since a democratically elected government came into power in 1994, SA has achieved steady progress and 'consolidated its position as the economic powerhouse in the southern African region and Africa'. Hence the migration of skilled professionals to SA should not come as a surprise, but the sudden increase in Zimbabwean immigrants is emblematic of deeper socio-economic and political problems facing SA's neighbour. The nature of Zimbabwean education professionals' migration to SA needs to be understood for its value in extending the current knowledge on South–South teacher mobility and migration in the African context. This paper revealed the reasons for Zimbabwean education professionals being in SA. The study has indicated that there are few similarities when comparing SA–UK teacher migration (as an exemplar of South–North teacher migration) to Zimbabwe–SA migration (as an exemplar

of South–South teacher migration). As earlier suggested, migration from Zimbabwe to SA is not a new phenomenon. Sisulu *et al.* (2007) refer to a 'third wave' of migration from Zimbabwe to SA occurring after 2000.

While economic benefits were articulated as one of the reasons for emigration, Zimbabwean education professionals also left their home country because of political turmoil that has had a knock-on effect on the economy and education opportunities. The education professionals articulated a tangible link between the economy and politics, which has also limited opportunities for further tertiary studies in Zimbabwe – clearly push factors from Zimbabwe. These findings affirm the assumptions made by Sisulu *et al.* (2007) that economic, political and education imperatives could be responsible for the migration of Zimbabwean teachers to SA. A key theme emerging from migrants' motives for exiting their home country is that of human vulnerability: both socio-economic and psychological, as migrants attempt to survive by pursuing work opportunities across the Zimbabwean border. Thus, Betts' (2010) claim of survival migration to explain Zimbabweans in SA has resonance.

By contrast Zimbabwe's neighbour, South Africa, has achieved economic and political stability since the first democratic elections in 1994. In addition, there is the education pull factor, namely the opportunity to pursue postgraduate studies that many participants have taken up, some immediately upon arrival in SA as was their intention. This pull factor is a facet that higher education institutions in SA could capitalise on, especially in terms of increasing the production of PhDs in SA, as the majority of the education professionals in this study were in receipt of postgraduate degrees (master's and honours). It should be noted that in time institutions known to individuals could constitute a type of social capital, which migrants can later use to enter foreign labour markets.

Many of the participants alluded to having either friends or family in SA, who supported their migration, or immediate family in Zimbabwe/UK. Migrant networks are cited as examples of social capital theory, as they convey vital information, provide financial assistance, facilitate employment and accommodation and provide forms of support. Hence, such networks reduce the costs and uncertainty of migration, and therefore facilitate it (Massey *et al.*, 1998). Social networks may therefore lead to migration having a multiplier effect, and the migrant education professionals did allude to having family facilitate their move or preparing for family to later join them in SA, particularly if they were successful in accessing formal job opportunities.

The contribution of Zimbabwean education professionals to development in SA and the education sector in particular should not be overlooked. While I cannot generalise from the small scale of this study, a common thread that seems to run through the interview data is that of the education professionals' high qualifications[5] and their numerous years of experience in teaching. SA is a country in dire need of qualified teachers, with provinces such as KZN articulating huge teacher deficits, particularly in rural areas (Wedekind, 2011). A majority of the migrant teachers interviewed were specialists in maths and physical science. Zimbabwean education professionals can be harnessed to fill the critical skills gap in the SA labour market at large, where presently maths and science teachers are needed at the school level. In fact, Limpopo province in SA has a bilateral agreement with Zimbabwe to provide teachers, and this could be extended to other provinces. With numerous lecturers being located in the education sector in a particular higher education institution in KZN, they are clearly filling a skills gap.

Thus, on a greater scale, there is a need to create or strengthen, where necessary, the mechanisms to support Zimbabwean education professionals' migration to SA. Hence, I concur with Betts (2010: 29) that 'the absence of formal opportunities for teachers in destination countries' needs to be addressed. Thus, the barriers to their entry into formalised job opportunities should be removed, since it is speculated that there are conservatively in excess of 1,000 Zimbabwean qualified teachers in SA, the largest cohort of foreign teachers within SA's borders.

Notes

1 It may not always be easily to distinguish whether the factors precipitating migration are voluntary or involuntary.
2 In Botswana, migrant teachers are referred to as expatriate teachers (Morgan *et al.*, 2006).
3 There were 26 teachers from developed countries in their sample of 382 migrant teachers.
4 Papers presented at the conference constitute a special edition of the *Journal of Southern African Studies*, Volume 36, Number 2, June 2010.
5 This is in keeping with the contention by Kriger (2010).

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PART III. Teacher Migration: Remaining Issues to Consider

10. Where have all the teachers gone? Why there are never any teachers in Africa's refugee camps and what we can do about it

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Abstract

When it is time to start formal education soon after a population has arrived in a refugee or displaced persons' camp, or has been isolated by war, it is often found that few qualified teachers are available. Using specific examples from Chad, Côte d'Ivoire, Malawi, Sudan, Uganda and Zambia, this paper argues that refugees, like anyone else, are rationally motivated by the availability of income. Thus the inability or unwillingness to pay teachers a competitive wage in the camp or to give them contracts is seen as a deciding factor for people who already have salaries. Furthermore, even if they flee with the rest to camps or settlements, qualified teachers are frequently taken by non-education non-governmental organisations (NGOs), get scholarships or resettlement more easily and find jobs, when allowed, in the wider host community. The resultant shortfall in the teaching force means it becomes necessary to create a teaching force rapidly.

In the context of little academic literature on these subjects, this paper uses examples from 20 years' of participant-observation by the researcher to provide an overview of the situation and provide recommendations. Examples include: first, giving training and support to volunteer teachers in temporary primary schools in displaced people's camps in Khartoum; second, training teachers in the then Sudan People's Liberation Movement (SPLM)-held areas of the South of Sudan using a modular training system; third, primary teacher training in Somalia; fourth, the need to educate large numbers of children from AIDS-affected families in Zambia when the teachers were also sick and dying; and fifth, experiences from Francophone countries: Côte d'Ivoire, Democratic Republic of Congo and Chad, where a French version of Be a Better Teacher ('le Bon Enseignant') was used to enable teachers to be trained in-service.

Key words
Migrant, Refugee, Displaced, Remuneration, Teachers, Governments

10.1 Introduction

When formal education begins in a refugee or displaced camp, it is often found that there are few teachers available among the migrant population. This has been noted in Malawi (Mozambican refugees), in Uganda (Sudanese and Rwandese refugees) and in Chad (Sudanese refugees from Darfur). The same observation applies to populations isolated in civil wars (stayees) and in urban slum areas. Though this probably applies to all qualified and salaried people, this paper focuses on teachers.

> Teachers are often very difficult to find among refugee populations. Along with the other salaried people, they may not have left with the rest, preferring to stay at home or move somewhere else in the country. They may have [also] decided to stay behind to support their remaining students. This may explain why there were only 373 qualified teachers for 60,267 pupils in Malawi at the beginning of the refugee influx from Mozambique in 1987 (Sesnan, 2009: 67).

10.1.1 Setting the scene: South Sudan in wartime

In successive waves, from 1983 onwards, much of the population of South Sudan was forced to flee by fighting between the government forces and the rebels. At first they fled internally to safer areas or to urban areas. Eventually, however, by 1989, large numbers were leaving the country, mainly to Kenya, Uganda, the Congo (then Zaire) and Ethiopia. From the late-1980s to 2005, South Sudanese could be found in:

- rural areas of South Sudan under SPLM control;
- isolated urban garrison towns (like Juba) from which the only exit, for 15 years, was a usually unaffordable flight to Khartoum;
- largely unofficial displaced camps around Khartoum and other big cities of the north; and
- camps or self-settled communities in the countries already mentioned.

Despite the agony of family separation, starvation and a large number of deaths, South Sudanese refugees were known for quickly setting up their own schools with little help. Usually it was only the churches that gave immediate help; NGOs and UN agencies arrived later. The schools they opened were not 'child-friendly spaces', or other currently fashionable, content-free substitutes for schooling, but a replication of the education ladder they had left behind – with some of its good points and many of its bad ones. After a short time, however, these schools started mimicking the education structure in the host country, particularly if it was English-language medium. It is worth noting that, for South Sudanese, Arabisation of their education was one of the prime reasons for their becoming refugees.

South Sudanese were not very concerned about 'buildings'. They built 'locally' of wood, mud and thatch in rural areas or set up in a courtyard under plastic sheets in urban areas, particularly in Khartoum. The big problem was that – with rare exceptions – they did not have any teachers. This researcher observed this phenomenon first-hand among South Sudanese in Northern Uganda, in Khartoum and in rural 'liberated' Sudan.

10.1.2 A town full of teachers

This researcher undertook an education mission to Juba in 1989 (Sesnan, 1989). Juba was then the isolated capital of Equatoria (now a region of South Sudan), the province from which many of the refugees and displaced persons had fled. When the mission arrived at Juba, it was found that schools were actually operating, and the statistics on paper showed 15,000 children at primary school (a good number for the population size and make-up then). Among these there were around 700 teachers officially registered, teaching in temporary schools.[1] Since the total number of teachers in Equatoria in 1985 had been fewer than 1,000, this was an important fact. The reason turned out to be simple, but something which perhaps had not been noticed then or elsewhere: even before the final flight of refugees or displaced people, teachers had started getting themselves posted to where their salary came from. In some cases, the government formally moved a rural school to the city, as the rural areas fell to the rebels.[2]

Only the official school in Juba paid salaries. In the rebel areas, there was a policy not to pay salaries out of a misguided belief that people would teach for patriotic reasons alone. In the refugee camps in Uganda and Kenya, the word 'salary' was not used by the UN and NGOs, and only small allowances[3] might be given on the grounds that food was free and, rather cynically, that there was no need to pay rent if you lived in a communal tent. One reason given for this was that the NGOs and agencies did not want to set a precedent.

Further, it was not simply a matter of salary; a teacher who was deemed to be 'established' in the system had many benefits and entitlements, including a rank and a pension; people were reluctant to lose these, even though likely payment was many years away.

When they could, teachers fled or gravitated towards their salaries. Of course, it was not always possible to do this if the flight came suddenly and the way to the main town was

blocked. This led to at least one interesting exception to the rule, the case of the Sudanese refugees in Dungu in the Democratic Republic of Congo (ex-Zaire) in the early 1990s. Most of the population in these camps had fled from the town of Maridi in Sudan, where the major teacher training college was. The camps were full of teachers and teacher trainers. The workforce also included priests, pastors and a bishop. Here there was a different problem: the local officials told them they could only teach in French, a language none of them knew (Sesnan, 1993).

10.1.3 Recognition of teachers

A formal qualification is not normally an issue if a refugee with at least secondary education wishes to teach in a camp, but this depends on the strictness of the NGO managing education. The lack of qualification becomes an issue if teachers wish to teach beyond the camp at schools in the host country, or if they had not completed secondary school.[4]

10.1.4 It's the money

Teachers will naturally try to go to where the money is. In every situation this researcher has worked in, there would have been no shortage of qualified teachers if a good salary had been offered for the job. Should agencies offer US$500 a month for qualified teachers, instead of the widely recommended US$100 in the short term, a lot of teachers would simply appear, either from inside the home country or from among the refugee population who had found these 'allowances' derisory. Indeed, a budget spent on paying teachers decently might even be lower than the total of all the budgets for short in-service training.

10.2 Creation of a teaching force in an emergency or the short term

In the absence of qualified teachers, it may be necessary to train a new teaching force. What follows are some examples of where this has been done. This researcher has been a contributor to the evolution of such materials.

This paper now briefly considers programmes that have addressed the issue of training the untrained teacher to become *competent*, *knowledgeable* and *confident*. This implies the need to learn methodology and, if teachers do not have a great deal of basic knowledge, the need to learn to become knowledgeable as well, possibly by returning to secondary education. Resources and enrichment of the teaching experience also play a role here.

Experience shows that programmes must combine all this with strong support, raising teachers' confidence in class so they will enjoy teaching. People who have never enjoyed and do not enjoy teaching find it hard to be good teachers; this is often (i) because they do not have much confidence and/or (ii) because they may not know what a good lesson looks like.

10.2.1 Khartoum in the 1980s

In the late 1980s there was a massive population movement into Khartoum, both from the south and the west of Sudan. The city authorities made no provision for the education of the children of these incomers, even when they numbered in the hundreds of thousands; they were deemed to be squatters and were not included in city planning or provided with school places. They lived in vast un-serviced camps, which were frequently destroyed – often brutally – and pushed further and further out into the desert.

Schools were set up in these difficult circumstances by the people themselves. Only the Catholic Church, in the form of the Archdiocese of Khartoum, and one secular organisation, the Sudan Open Learning Organisation[5] (SOLO) supported by Oxfam America, provided any kind of meaningful assistance.

SOLO used its experience of providing a form of distance education to refugees (both urban and camp-based) from Ethiopia and Eritrea to provide pupils' materials. Because of

the lack of premises – and indeed the danger of premises being bulldozed by the authorities – SOLO adopted and developed the idea of a school kit, calling it a *School in a Box*.[6]

SOLO developed a self-help course for the large number of 'volunteer' untrained teachers, called the *Teacher Assistance* course. This course had 30 short modules on specific and practical themes ('How to Use the Blackboard' and 'Handling Large Classes' were two examples). These were to be studied alone in teachers' tents or shacks, and in small groups with an experienced teacher wherever one could be found. The course was available first in English for the Southern displaced, then in Arabic for the other refugees. No effort was made to include more than the simplest educational theory or pedagogy; the urgent need being seen was to make the teacher competent and confident in front of the class.

10.2.2 South Sudan

In the early 1990s, as agencies sought to address education problems in the Sudan People's Liberation Army (SPLA)-held areas of South Sudan (which also suffered great isolation during the civil war), a modular training programme was set up under the South Sudan Education Coordination Committee (upon which this researcher represented the Education Programme for Sudanese Refugees and Makerere University).

This programme, managed by the Sudan Literature Centre, was wider than the Khartoum programme of SOLO and included for the first time modules on psychology and history of education and subject-specific modules such as mathematics. Thus it explicitly recognised that the teacher did not just need to learn methodology (pedagogy), but also had to have their own knowledge improved.

In theory, after three years of these vacation courses a primary teacher accumulated sufficient modules to be given a certificate. This did not often happen in practice, however, as NGOs lost funds or lost interest and teachers moved on to other places or other jobs.

At this point, the UNESCO Programme of Education for Emergencies and Reconstruction (PEER) and UNICEF commissioned the current researcher to write a work that took the title *Teacher's Friend,* and which provided the teacher with model lessons and a series of questions and answers on good practices. A section on 'General Knowledge' was also included for the first time. The 40 model lessons were designed to be worked through by an inexperienced teacher step by step. Each lesson simultaneously illustrated a *method* (group work, taking the class outside and so on) and a *theme,* which could appear across several lessons. 'The work my mother does' and 'My sister is good at mathematics', for example, illustrated gender themes, while 'Vaccinations and injections' and 'Symptoms and diseases' illustrated medical themes.

Though written specifically for South Sudan, the *Teacher's Friend* was later translated into French for the Democratic Republic of Congo (*Le guide pédagogique*) and into Portuguese for Mozambique.

This manual was used for some years in some areas in South Sudan. Although intended to be a self-help manual, it is most effective when the teacher also receives the benefit of a couple of days' introduction by a trainer.

10.2.3 Somalia: shortage of teachers everywhere

UNESCO-PEER first worked on primary education in Somalia, where the state education system had largely collapsed since 1989. The modular SOLO *Teacher Assistance* materials were subsequently translated and, with little adaptation, adopted in the new Somalia programme as Somalia Open Learning Unit (SOMOLU) courses. The *School in the Box* also emerged in Somalia as school kits distributed both by UNICEF and UNESCO-PEER in a joint programme. Eventually, from the same sources, a team in Somaliland developed a much more substantial self-help, 40-module course called *Be a Better Teacher*, which established the now-general pattern of three ten-module courses for ordinary teachers (A, B, C) and one extra course (D) for school administrators and inspectors. A ten-module course lasted typically one term.

10.2.4 Zambia: the Spark Integrated Training Project

In Zambia in the 1990s, already rapid urbanisation was compounded by the sickness and death of large numbers of teachers from AIDS-related diseases. Teachers were dying faster than new ones could be trained. Calling back retired teachers was no longer enough.

The need to handle large numbers of children of AIDS-affected families, orphans or simply the impoverished who could not afford to stay in the government system, meant that new solutions had to be found. The Catholic Church started setting up 'community schools' in churches, halls and in one case in a night club's premises. These schools took in any and all children, but had minimal resources and so had to develop ways to speed children through the system faster than normal.

Through UNICEF and a flexible and enlightened Ministry of Education, a programme was developed to train secondary school leavers as emergency teachers for these schools. These young teachers were paid little, but turned out to be enthusiastic and innovative. As they were secondary leavers there was no need to teach them content. The *Spark Training Project* was created for those teachers, based loosely on the same principles used in the *Teacher Assistance* course. It also incorporated many elements of the *Teacher's Friend*.

An additional element was the creation of a new accelerated primary scheme of work, through which primary school could be completed in four years, instead of the official nine. The teachers were trained on this and contributed a great deal to its evolution.

The new scheme of work and the training was based on surveys of parents, guardians and pupils on what they considered important for the children to learn. It turned out that uneducated parents wanted their children to be able to communicate with the government more than almost any other thing, so letter writing and oral English were strengthened.

The emergency training was eventually linked with the provision of school kits for the community schools and access to library/resource centres. The whole kit and training were referred to as 'the Zedukit'.

10.2.5 Illustrative notes from Francophone countries: Côte d'Ivoire, Democratic Republic of Congo and Chad

When the *Forces Nouvelles* (New Forces) rebels took over the north of Côte d'Ivoire in 2002, the government in Abidjan promptly announced that all civil servants' salaries would only be paid in government-held areas. The result was a massive exodus of teachers, doctors and salaried civil servants from rebel areas to government-held ones. Those parents who could afford it shifted at least the boys to schools in the south, which still operated.

In the Democratic Republic of Congo (DRC), the former rebel areas needed something more fundamental – to start up education in huge areas that had been devastated by civil war (or by incursions of foreign troops in support of mineral exploiters).

In Chad, almost all the refugee teachers being put forward were untrained, and even those who had training had a limited and fairly old-fashioned training before they fled.

In all these three cases a French version of *Be a Better Teacher* (*Le Bon Enseignant*) was used to enable the teachers to be trained in-service. The 40-module course was adapted for each country.

Notes

1 Schools were either in a displaced persons site (where people of the same village were usually camped together) or were shared with an existing school, but maintained their own integrity. For example, the school buildings in which the current researcher used to teach were host to five other secondary schools and had six head teachers and six teaching staff (all squeezed into eight classrooms). Not only had the teachers moved there, but the whole school had been reconstituted administratively.

2 This sometimes led to a bizarre situation where at least two schools of the same name existed – one in Juba (now the official one) and one in the camps outside the country. In one particular case, a third one was reborn in its original home site during a lull in the fighting.

3 'Allowance' is just one of the many words the development industry uses to avoid saying 'salary'. Usually local labour laws are comprehensively flouted by giving neither salaries nor contracts.
4 Recognition could occasionally be straightforward, such as when secondary teachers in Somalia could be proved to have been trained at the University of Mogadishu before it closed. The Africa Educational Trust held all their graduation lists on a floppy disk!
5 Then 'The Sudan Open Learning Unit', part of International Extension College, Cambridge.
6 This was the first use of the term '*School-in-a-Box*', used in later years by UNESCO and UNICEF in other countries and Norwegian Refugee Council under the name of 'Teacher Emergency Pack' (Cater, 1989).

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Teacher's friend – for Sudan
Guide pédagogique – for Democratic Republic of Congo

Training self help:
Be a Better Teacher – originally for Somalia
Le Bon Enseignant – versions for:
–Democratic Republic of Congo (UNICEF/UNESCO and separate version for South Kivu prepared for l'eglise méthodiste libre du Congo);
–Cote d'Ivoire (Norwegian Refugee Council); and
–Chad (also in Arabic).

11. Teacher migration and education in conflict and post-conflict countries: Experience from Somalia

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Abstract

Teacher migration in conflict and post-crises countries such as Somalia has increased in the past four years. Qualified teachers are vulnerable to migration to other countries for reasons of safety and to seek out 'greener pastures', and the trend is for non-professional and immigrant teachers from neighbouring countries to fill labour gaps in countries in crises. Due to the prolonged conflict, Somalia is losing qualified workers in the field of teaching. While addressing issues of teacher migration in emergencies and difficult circumstances is important to balance education systems development, there is lack of policy on teacher migration. This paper provides a discussion on teacher migration and education in conflict and post-conflict countries, focusing on the migration of Somali teachers to other countries in search of greener pastures and the recruitment of immigrant teachers from other countries to fill the gaps. Three aspects of teacher migration are discussed: teachers' motivations for leaving Somalia, teacher qualifications, and teacher compensation. The paper also discusses some challenges facing teacher management in crisis situations. The paper concludes by calling for further discussion to contribute to a greater understanding of planning and management of teacher migration in conflict and post conflict countries.

Key words
Teacher Migration, Conflict and Post-Conflict Situations, Qualifications, Motivation and Retention, Management, Compensation

11.1 Introduction[1]

Education in conflict and post-conflict emergencies and early reconstruction is an emerging discipline at the heart of United Nations Educational, Scientific and Cultural Organization (UNESCO) programmes. Although infrastructure and material support are necessary in the context of emergencies, they do not satisfy every condition for ensuring quality of education or schooling in emergencies. The teacher is a critical factor in the provision of conditions that determine the quality of education in emergencies. The importance of capable and qualified teachers is more apparent in environments of conflict and other difficult circumstances. In situations of emergency and post-conflict recovery or reconstruction, teachers are not only facilitators of learning, but represent one of the only consistent sources of reassurance and normalcy for children and their communities who have undergone traumatic experiences.

In emergency situations, teachers play a vital role in providing protection and psychosocial support that complements what pupils and students get from their parents or communities. Teacher *qualification*, *development*, *motivation*, *retention*, *acknowledgement* and *support* have crucial short-, medium- and long-term implications for improvement in any education system in emergencies, post-conflict and recovery situations.

The professional development and management of teachers becomes imperative in emergencies, conflict and post-conflict situations because of their critical tasks in helping to restore a sense of stability and confidence among affected populations. However, since most teachers are drawn from the same affected communities, they are equally vulnerable

to instability and deprivation. This poses a serious challenge to building and maintaining a cadre of qualified teachers in emergencies, conflict and post-conflict situations. Thus, the issue of teacher management and motivation in terms of compensation is crucial and real in these contexts. If not paid appropriately, teachers leave the education system, seeking other 'greener pastures' to support themselves and their families. This is a real case in Somalia, where the many qualified and trained teachers are taken mostly by UN agencies, non-governmental organisations (NGOs) and private companies, with many even venturing to the Middle East, East Africa and South Africa.

A survey conducted by UNICEF Somalia (2007) shows that out of a total of 13,966 teachers in primary school, only 13 per cent had a teacher training diploma, while 6 per cent had a university degree, 48 per cent had a secondary education certificate and 27 per cent had a primary education certificate. Out of the 3,000 strong secondary teaching force in Somalia (UNESCO-PEER, 2008), only 38 per cent considered themselves qualified, with no formal opportunity for them to be trained. Many of the remaining teachers in both primary and secondary schools did not choose to become teachers, but were asked and recruited by their communities and regional administrations because of their relatively good level of education. Once chosen, however, they expressed their willingness to serve their communities in the capacity of volunteer teachers. One teacher was asked and said, 'I am really a trained teacher, but I could not teach in Somalia because there is no money … I am going abroad or to get employed with an NGO to use my professional value for money … [T]he situation is not good for me and my children'. The teacher further said that teachers were paid 'incentives' – not salaries – of less than US$90 a month.

In addition to the push factor of insecurity, the financial incentive (as demonstrated above) is a significant pull factor causing qualified and professional teachers to leave countries in conflict. The demand for teachers by the community and other actors leads to recruitment of qualified teachers from neighbouring countries through unregulated processes, causing massive inefficiencies in teacher management. If teachers are not able to earn their living, they will leave for another form of employment. This loss of qualified and newly trained teachers in countries in emergencies and conflict is a significant and difficult loss to regain. In many cases, and especially in Somalia, this has led to a tragic cycle of constantly training unqualified teachers by UNESCO, UNICEF and NGOs to address the teaching gap in schools. The teacher conditions in the context of education in emergencies and post-conflict reconstruction, however, indicate that the challenges go beyond salaries or teacher incentives/compensation. There are critical issues around the conditions in which the teachers work, including security, teaching load and their work environments. The factors shaping the situation are varied and complex, and there is an urgent need to understand them (INEE, 2009*a*). Policy-makers, education practitioners and researchers are required to determine and influence guidelines and policy for teacher compensation in emergencies, conflict and post-conflict reconstruction as the situation dictates.

11.2 Teacher migration (context-specific) and its implications

Within the region, it has been the case that the international recruitment of skilled personnel including teachers negatively affects the development of countries, as it can reduce the pool of human capital required for development. Teachers are a particularly interesting case, especially in situations of conflict, because their departure not only deprives the education system but also the children – the future generation of the country. Teachers are highly valued members of the community and occupy a wide range of roles. If teachers leave for better opportunities, the sending country community and other stakeholders may feel short-changed or aggrieved, as they see the investment and funds used for training teachers lost.

There is significant evidence that the loss of qualified teachers in emergencies and conflict-affected countries creates space that untrained teachers and community members may fill. The key issue here is the impact on the educational system in the conflict-affected communities. The migration of qualified teachers has led countries such as Somalia to

recruit teachers from other countries, by using private and international actors in consultation with the local administration and communities. However, there is a lack of reliable data on this, which makes it difficult to determine the exact number of migrant teachers in any of the three administrative regions of Somalia – Central South Somalia, Puntland State of Somalia and Somaliland State.

In time, Central South Somalia, Puntland State and Somaliland's immigration departments could be of help in collecting data. The most difficult situation is that the Transitional Federal Government (TFG) of Somalia is not in control of the number of teachers recruited by private or umbrella schools from neighbouring countries. This is due to limited administrative capacity and a lack of robust, strong policies regulating private schools. Recruitment is also in principle decentralised, with Central South Somalia, Puntland State and Somaliland each having their own mechanisms. This is further complicated by the political quest by Somaliland to be an independent state. However, it is clear that substantial numbers of teachers are being recruited from Kenya and Uganda to teach in secondary schools and teacher training institutions. Teachers from Sudan, Egypt and other Arab World countries as well are recruited to teach in private and international schools, which may have different standards from those of public schools. However, no data are available on the differences.

The recruitment of teachers on short-term or medium-term contracts is not a bad solution to the ongoing emergency and conflict situation in Somalia (UNESCO-PEER, 2008). Many overseas teachers recruited through private schools are only part of the story, as some are paid between US$200 and US$300 per month with free food and accommodation. This compares to the between US$90 and US$110 per month 'top-up incentives' – as opposed to salary – paid to an average recruited Somali teacher and head teacher (AET, 2009). With the prevailing situation in Somalia, this approach is trickier and unsustainable as there is no policy regulating it. Not much is known of the teachers working in tertiary institutions.

Responding to address the gap created by Somali qualified teachers leaving the education sector for greener pastures, in 2007 UNESCO supported the Government of Somalia by training primary school teachers through the use of information and communications technology (ICT) support for teacher education. An in-service teacher training programme enrolled 170 teachers; 142 (83 per cent) completed the programme and were awarded a Diploma in Teacher Education. Other agencies, such as the European Union and other international organisations, have invested in teacher training through the 'Strengthening the Capacity of Teacher Training in Primary and Secondary Education programme' (SCOTTPS). This is being implemented by a consortium of national and international NGOs through local universities, in collaboration with the respective ministries of education of South Central Somalia, Puntland State and Somaliland.

However, the newly trained teachers are not all retained in the teaching workforce. Where teachers have been trained at public expense and where their professionalism and expertise cannot easily be replaced, their loss represents a major setback to achievement of the internationally agreed goal of universal primary education. The consequences of the shortage of teachers due to 'brain drain' are particularly damaging, as low levels of education are inextricably linked to poverty, especially in emergency, conflict and post-conflict situations. Furthermore, because locally recruited teachers tend to be paid less than migrant teachers due to lack of policy guidance in situations of conflict and post conflict, teaching is not able to attract local people into the profession, continuing or exacerbating teacher shortages.

Nevertheless, migration has a number of positive aspects. For example, the recruitment of business experts from Somalia to countries like Kenya and South Sudan has benefited and stimulated economic growth in Somalia. Many of the Somalis in the diaspora maintain their strong link with their families back in Somalia and communities. They have often continued to contribute financially through their remittances, and also invest in constructing schools, hospitals and properties in their villages and communities. The remittances are particularly beneficial for local income levels, because they circulate in the

economy of the home country of the migrant worker. In most cases, remittances are used for family-oriented and collective purposes. They are used for basic consumption, food, health, education and community development (Cortina and de la Garza, 2004). Other benefits of the remittances made to Somalia include: enabling the country to purchase staple food; contributing to foreign exchange reserves; effectively assisting in wealth distribution; and possibly promoting private sector development efforts by enabling families to receive the necessary capital for housing and small business start-up (UNDP, 2005). Lindley (2005*a*) has emphasised the contribution that remittances make to the education sector in Somalia. Based on this assertion, it can be argued that the cost of education is alleviated when remittances are sent to families, because children are given the opportunity to go to school.

However, the reverse is also true: a high proportion of the workforce has left the country for greener pastures, but does not remit. Remittances are a complex area of research. It is difficult to know or identify which migrant sends remittances and which does not. The problem is that most remittances are sent through banks or money transfer agencies, with some funds still being hand-delivered. According to Lindley (2005*b*), factors affecting remittances are still little understood, as there is no firm research evidence on the incidence of remittance sending in the Somali diaspora or on comparative incidences of remitting among cohorts. The negative impact of this cannot be underestimated, as it may represent an enormous loss of investment in emergency, conflict and post-conflict situations.

11.3 Challenges

Although teacher migration is potentially a win-win game for both leaving and incoming teachers, countries in conflict have not been able to gain as much from their investment in education through migration as has been the case for non-emergency and non-conflict states. In emergency and post-conflict situations, there are many challenges affecting teachers. It is not possible to divorce the challenges of strengthening educational quality in emergency, conflict and post-conflict situations from the teachers who are charged with maintaining that quality of teaching.

However, teachers face unique situations that are inherently bound to particular difficulties. Many countries in conflict in the Great Lakes Region and the Horn of Africa are grappling with the issue of teacher compensation in refugee and internally displaced person (IDP) camps, with some being given food for work and top-up incentives as compensation for their labour, as opposed to a formal salary. Related to this is the lack of coherent co-ordination policies and the huge range of actors engaged in providing educational services. The World Bank (2006) identified several factors, summarised below, which affect teacher management and retention in emergencies and conflict situations.

a) **Insecurity**: Insecurity in all its contexts (emergencies, conflict and post conflict) is a condition that any education initiative will have to address. Teachers pay a heavy price in this situation, wherein they themselves are put at risk. This is further aggravated by a weak (or absent) state and inadequate governance leading to ambiguity in roles and responsibilities among stakeholders.

a) **Weak institutions**: In many cases, emergency situations render state structures powerless as there are many competing priorities for local authorities, forcing them to improvise with what is available and put in place arrangements that are sub-optimal in comparison to standards used in a development context or in normal times. However, this arguably may also apply to countries with strong institutions that do not allow refugee/migrant teachers to teach legally.

b) **Lack of long-term investments**: Emergencies elicit speedy responses from funding organisations. Nonetheless, such responses are often in the form of a large quantity of funding with short timeframes for spending, such as the Consolidated Appeal Process (CAP). While immediate relief is effectively addressed through such a funding regime, rehabilitation and reconstruction, including education, are long drawn-out processes

and do not receive adequate support beyond a limited timeframe. This is a factor that affects the creation of any long-term arrangement for teacher retention, management and compensation structures.

c) **Inadequate financial resources in countries in emergencies and conflict**: Some of the critical causes of conflict are problems related to stability and economic growth. Such countries face problems of poor revenue generation, which compromise future of plans for economic regeneration. Traditionally the financial commitment to education in these countries has been inadequate and future budgetary allocations are highly dependent on international communities and transitional plans for reconstruction. Teachers are left to bear an enormous burden, working in under-resourced settings, often without adequate or regular salaries, support or training. Furthermore, less qualified or poorly trained teachers are often hired in these instances, complicating structures for teacher compensation.

d) **Value placed on the educational profession**: Traditionally low salaries for educators make it difficult for teachers to keep up with the escalating real cost of living. This leads to questions about where the teaching profession stands in comparison to other professions. In setting policies and determining practice around compensation, non-state providers (e.g. NGOs, communities or religious groups) face difficult questions about whether they should opt for greater compensation for their teachers on equal terms with similar professions.

e) **High teacher turnover**: Teacher attrition is a real problem. Poor working conditions, high workloads, inadequate and inconsistent salary/incentive payments all contribute to teachers leaving their posts in conflict environments and too often abandoning the profession altogether. This is further aggravated by the presence of international organisations and the availability of better-paying work with NGOs and UN agencies. In Somalia, for example, the salaries of UN and NGO security guards are much higher than those of teachers in public schools.

11.4 Summing and conclusion

The key point made in this paper concerns the policy gap in facilitating teacher retention and compensation in emergencies. It is evident that compensation is part of the larger issue of teacher management in emergencies and conflict. Therefore, it needs to be seen holistically to include the issues of fund flows and fund management, and teacher accountability and performance. In the context of conflict and post-conflict reconstruction, a number of players implementing education programmes need to consider the minimum standards of teacher management (INEE, 2009*b*). Among these players are UN agencies, religious groups, local and international NGOs and local administrations/governments, each of which currently has its own performance standards/guides and outcomes for the management of teachers.

Owing to the lack of policy tools/guides in the management of teachers in conflict and post-conflict countries, some actors have no efficient mechanism for assuring retention of teachers in host countries, with Somalia being one example. To begin with, the implementation of the principles of the Commonwealth Teacher Recruitment Protocol (Commonwealth Secretariat, 2004), which sets out the rights and responsibilities of both recruiting and sourcing countries, would be a welcome step. For example, the protocol encourages countries to examine teachers' working conditions to determine if systems are contributing to the exodus of the trained teachers (which is evidently the case in emergencies). However, the implications of the protocol in the context of the management of teachers in emergencies need to be explored further. To maximise the investment in education, management and compensation of teachers in emergencies and conflict situations, policies and tools need to be developed to guide the process in affected countries to enable them to benefit from the principles of the protocol.

Although the factors discussed in this paper provide an insight into what should be considered in order to better plan and manage teacher migration in emergencies, the following questions still need to be answered:

a) How can the principles of the Commonwealth Teacher Recruitment Protocol be implemented in non-Commonwealth countries in emergencies, conflict and post-conflict situations (as is the case with Somalia)?

b) In an emergency situation, what are the bases upon which teacher compensation/salary is determined? What factors should be considered to influence this?

c) How can the roles and responsibilities of different stakeholders – government/regional/emerging administration, humanitarian agencies, NGOs and private actors – be defined in ensuring acceptable teacher compensation?

d) Who should decide on teacher compensation structures in situations of crisis and afterwards?

e) Who is responsible for teacher compensation? How is teacher compensation managed? What is the role of donor and UN agencies in harmonising various practices?

f) Should there be special incentives for special conditions or qualifications (such as incentives for women teachers)?

Notes

1 The information for writing this paper was collected from various documents and reports. It was purely limited to a desk review. This was complemented by information collected from Education Sector Coordination meetings and discussions with UNESCO antenna office colleagues. The paper is written in a personal capacity and does not in any way represent or reflect the views of UNESCO, other UN agencies, any international organisation or the ministries of education in Central South Somalia, Puntland State of Somalia or Somaliland.

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12. Teacher attrition in Wolaita: The cases of domestic migration of Bolosso Sore and Damot Gale *woredas*

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Abstract

There have been calls to reframe attrition issues from the macro-level to a more manageable organisational level, with particular emphasis on districts and schools. Moreover, it has been noted that data from school administrators might be the most grounded and accurate measures of actual staffing problems at the school level. This study concentrates on two districts in Wolaita Zone of the Southern Nations and Nationalities Peoples Regional State of Ethiopia, gathering information from the directors and deputies of all 67 governmental primary schools in Damot Gale and Bolosso Sore. It concludes that although teacher attrition may be one of the problems within the educational system, it may not be as big a challenge as it is made out to be. In fact, it is possibly being used as a scapegoat for other underlying issues such as qualified but poorly trained teachers, inadequate teaching materials and the poor facilities of a country that is underdeveloped as a whole. Moreover, school management seemed to be looking for a panacea to be handed down from above, but ought to investigate less capital-intensive and more creative solutions that could both minimise staff attrition and mitigate its negative effects. Nevertheless, many schools have made commendable initiatives, such as building staff accommodation and classrooms with support from the community. Still, capacity has to be built and schools empowered more to seek their own solutions.

Key words
Teacher Attrition, Director Leadership Skills, School Improvement Programme, Teacher Mobility, Staff Turnover

12.1 General background

In 1991, the Ethiopian Peoples' Revolutionary Democratic Front (EPRDF) defeated and overthrew the socialist government. The new Transitional Government of Ethiopia (TGE) identified some of the major problems of the country as having been top-down policies, approaches to development being influenced too much by expatriates and unrealistic objectives set on assessment of the better-off regions (Prime Minister's Office, 1994: 8). A federal parliamentary republic was established, with the country divided into regions. These were in turn subdivided into progressively smaller administrative areas, namely zones, *woredas* (districts) and *kebeles* (the smallest administrative area).

In 1991, the Prime Minister's Office set up a central task force to study policy issues on curriculum and research, teacher training and development, educational measurement and evaluation, language in education, educational management and finance, and educational materials. Soon after, the TGE published a policy on education. The Education and Training Policy (ETP) stated that primary education would consist of eight years (in two, four-year cycles) and secondary education of two compulsory and two optional years, with the government providing free education for the first phase of education for ten years (TGE, 1994: 7). The self-declared aim of this policy was to provide direction to 'the development of problem-solving capacity and culture in the content of education, curriculum structure and approach focusing on the acquisition of scientific knowledge and practicum' (TGE, 1994: 2). This aim was supported by 5 general and 15

specific objectives, alongside the strategy of revising several fundamental elements such as curriculum, education structure, measurement and evaluation tools, medium of instruction and financing. Special attention and priority were given to a change of curriculum and educational materials, teacher training and staff development, and the management of education as a whole.

In 1995, the Ministry of Education (MoE) followed up on the ETP with a comprehensive document that gave a global view of the Ethiopian education arena over the next two decades called the Education Master Plan. This in turn was broken down into more manageable periods of five years each, named the Short-Term Education Plans or Education Sector Development Programmes (ESDP). By ESDP II it had become apparent that 'teacher training and staff development were crucial issues, as the quality of teaching and learning in Ethiopian schools was not able to produce a school-leaver workforce that could adequately serve the needs of national development' (MoE, 2008: 2). Consequently, the Teacher Development Programme (TDP) has become one of the main pillars of the education sector development programmes. However, Ingersoll and Perda (2010: 590) point out that initiatives to recruit and train teachers are rendered void if those teachers do not stay in the system. Consequently, overall strategic guidance is crucial. The overall strategic oversight of the Teacher Development Programme is the responsibility of the State Minster for General Education while '... the REBs [Regional Education Bureaus] will assume managerial responsibility for all activities being implemented within their region – including those at *woreda* level and in the TTIs [teacher training institutes]' (MoE, 2008: 6). Currently, there is the need for more *woreda*- and zone-level interventions, as there is a widely held variant of the teacher shortage thesis that shortages are the most varied at school level and geographically based (Ingersoll and Perda, 2010: 584). However, in Ethiopia there is a serious lack of capacity at these levels to supervise and manage educational projects.

The Southern Nations and Nationalities Peoples Regional State (SNNPR) is located in the south-western part of Ethiopia and is probably the most diverse region in the country. It covers 112,323km^2 and has a population of 14.5 million people, who represent about 56 ethnic groups. Wolaita is one of the 13 zones, eight special *woredas* that have particular features or administrative structures, and one town administration that make up the region. The other zones are those of Bench Maji, Dawro, Debub Omo, Gamo Gofa, Gediyo, Gurage, Hadiya, Kefa, Kembata, Sheka, Sidama and Silte. The special *woredas* are: Alaba, Amaro, Besketo, Burji, Derashie, , Konso, Konta and Yem. The only city administration at regional level is Hawassa, the region's capital city. Wolaita itself is composed of 12 *woredas* and three town administrations. The *woredas* are: Bolosso Bombe, Bolosso Sore, Damot Fulasa, Damot Gale, Damot Sore, Damot Weyedie, Deguna Fango, Humbo, Kidno Ddoye, Kindo Koyesha, Ofa and Soddo Zuria. The three town administrations are those of Areka, Boditi and Wolaita Soddo.

At primary level, Wolaita has gross enrolment of 395,147 students and net enrolment of 349,298, putting its gross and net enrolment ratios at 100.6 and 88.9 per cent respectively (the national rates are 94.2 and 83 per cent respectively).[1] Wolaita has a gender parity index of 0.90 (national 0.93) and pupil–teacher ratios of 88:1 and 72:1 in its lower and upper primary cycles respectively (national ratios are 62:1 and 52:1). In terms of qualifications, 99.87 of first cycle and 93.13 per cent of second cycle primary school teachers are qualified[2] (national rates are 89.4 and 76.8 per cent respectively). Even though Wolaita has the highest pupil-section ratio[3] in the lower cycle in SNNPR, it managed to pass 71.7 per cent of all its students in the Grade 8 National Exam in 2007/08, second only to Basketo Special Woreda (Southern Nations and Nationalities People's Region Education Bureau [SNNP REB], 2009). This indicates the complexity and multidimensional nature of issues relating to the quality of education raised by researchers (Tikly, 2011: 1).

The two target *woredas* for this study are Bolosso Sore and Damot Gale. Bolosso Sore has 36 primary schools with 322 first cycle teachers and 144 second cycle teachers, while Damot Gale has 31 primary schools with 254 first cycle teachers and 139 second cycle

teachers. These schools have a total of 542 and 443 sections respectively. They cater for a total of 46,391 and 39,452 students respectively (SNNP REB, 2009). These two *woredas* are mostly in a rural area that is mainly agrarian, though they do contain small towns. They were among the worst performing of the 13 *woredas* in the zone.

The two *woredas* have been selected for this study due to the fact that Link Community Development (LINK), an international educational NGO working in five African countries, is active there. As a result, there is access to all the school directors, deputy directors, supervisors and Woreda Education Office (WEO) staff, as well as valuable data and 'inside information' on the schools. LINK is supporting the government-driven initiative of the School Improvement Programme. Similar to 'Uwezo' in Tanzania and 'Pratham' in India, this programme is aimed at improving the quality of education through evidence-based reflection and participatory planning, leading to ownership and accountability by all involved.

One of the components of LINK's support is training, and it aims to create flexible training packages to be developed and delivered in partnership with regional, zone and *woreda* education offices with the key focus areas on literacy, HIV & AIDS, director leadership skills, support to teacher continuous professional development (CPD) and Parent/Teacher Association (PTA) capacity-building.

12.2 Statement of the problem

The TDP made some major achievements and, shortly before the time of writing, three out of five second cycle primary teachers, and nearly all first cycle primary teachers, were considered to be qualified, according to the criterion of holding a certificate (MOE, 2008). This situation had recently changed due to the minimum qualification to teach at primary school being changed from a certificate to a diploma. However, 'teachers reported having increased levels of professional self-confidence, more methodological skill and a continuing desire for more professional development through other CPD courses' (MoE, 2008: 3).

In Bolosso Sore and Damot Gale, LINK has trained hundreds of teachers in all the schools and claims considerable improvement in the teaching as well as the students' results in national examinations. However, staff mobility and attrition may be seriously undermining the advances being made if, like some other countries, there is around a one-third annual turnover. This turnover may not be evident in national statistics, as national-level discussions mask the specific needs and diagnosis procedures revealed by disaggregated data (Ingersoll and Perda, 2010: 585). Tikly points out:

> the so-called 'implementation gap' between national policy and its implementation at the school level requires engaging with the experiences and views of teachers and head teachers, ensuring that initial and continuing professional development opportunities are consistent with the demands of new curricula and other initiatives, and providing support for schools in implementing and monitoring change (2011: 11–12).

Therefore, there is the need to scrutinise whether attrition is undermining the effectiveness of the training being delivered. If so, one should study the reasons underlying turnover and try to keep teachers in their schools at best and within the education sector at least.

Some researchers differentiate between teachers leaving the teaching profession altogether and others who simply leave the school, but stay in the profession. They use terms like 'teacher attrition', 'teacher migration', 'attrition' and 'mobility', interchangeably, or simply apply the terms 'leavers' and 'movers'. For this study, 'attrition' refers simply to the departure of a teacher from a school, no matter what the reason, as 'from an organisational level of analysis, teacher migration and attrition have the same effect' (Ingersoll and Perda, 2010: 587).

12.3 Literature review and theoretical framework

A plethora of research studies have been conducted on teacher attrition. Guarin, Santibanez and Daley (2006) carried out a review and found 4,919 unduplicated studies. After sieving out those that were simply theoretical discussions, non-empirical, of dubious quality or not quite relevant to their purpose, they ended up with just 46.

One of the major findings of the research on teacher attrition is the fact that as teacher quality is one of the most significant predictors of student achievement, 'teacher turnover has significant implications for the education profession, because it contributes to organizational instability and high levels of uncertainty in educational settings' (Swars, Meyers, Mays and Lack, 2009: 169).

Other relatively smaller research studies in the United States of America and elsewhere tried to analyse teacher and school characteristics related to attrition. Findings from these included that women had higher attrition then men and non-white teachers had lower attrition rates than white teachers, or reaffirmed the obvious fact that, 'teachers exhibit preferences for higher salaries, better working conditions and greater intrinsic rewards and tend to move to other teaching positions or to jobs or activities outside teaching that offer these characteristics when possible' (Guarin, Santibanez and Daley, 2006: 201).

Noticeably, most of the research was done in developed countries, reflecting the power and inequality that lie at the heart of the research process (Tikly, 2011: 1). Therefore, to move away from a hegemonic approach to a much more inclusive and context-sensitive perspective, it is necessary to take an in-depth look at smaller localities to arrive at views that reflect the context-specific, felt needs of the learners and teachers at the grassroots. This is in line with a general paradigm shift from an econometric and impersonal approach to a more humanistic and empowering approach, based on the premise that every individual matters.

12.4 Aims

There have been calls to reframe attrition issues from the macro-level, with its inexorable societal demographic trends, to a more manageable organisational level, with particular emphasis on districts and schools (Ingersoll and Perda, 2010: 568). Moreover, it has been noted that data from school administrators might be the most grounded and accurate measures of actual staffing problems at school level (*ibid.*).

Consequently, to begin with this paper intends to look at how many elementary teachers in 67 rural government schools in two *woredas* (districts) in SNNPR have actually left their posts over the last two years, exploring the major reasons why the teachers have left schools from the point of view of school directors.

Next, it will analyse the schools with the highest and lowest attrition rates to identify characteristics of these schools. Most schools are clustered in groups of five and have one *woreda* supervisor assigned to them, so following from this the paper aims to consider cluster-recommended solutions to teacher attrition and finally scrutinise the turnover at the school administration level.

By doing the above, this paper ultimately aims to contribute to the dialogue on the difficult educational delivery contexts of this part of Africa and suggest solutions to some of the challenges.

12.5 Methodology

All the elementary school directors and their deputies from the 67 governmental primary schools in Damot Gale and Bolosso Sore were given ten items asking them to rate the importance of various push factors for teachers leaving the schools on a 4-point Likert scale ranging from 1 (strongly disagree) to 4 (strongly agree). The items were distributed at a training session held from 29 April to 30 May 2011 in the Zone capital, Wolaita Soddo. They were also asked to identify the number of teachers who had left their schools over the

last two academic years. Then they were put in focus groups along with their cluster supervisors and asked to discuss possible solutions (see Appendix 12.1 for exercise). Some of the issues they raised were informally double-checked with officials from the WEOs.

In addition, the heads and the schools that had very high or very low turnovers were put together and similar features were discussed with three LINK staff, who were familiar with the schools and the context. Finally a rapid survey was made on how many of the schools had kept at least the director or the deputy in management in the post for both the academic years in question. Some of the data was further described, presented and analysed using the data analysis application *Statistical Package for the Social Sciences*, giving a descriptive snapshot of life including the entire target area.

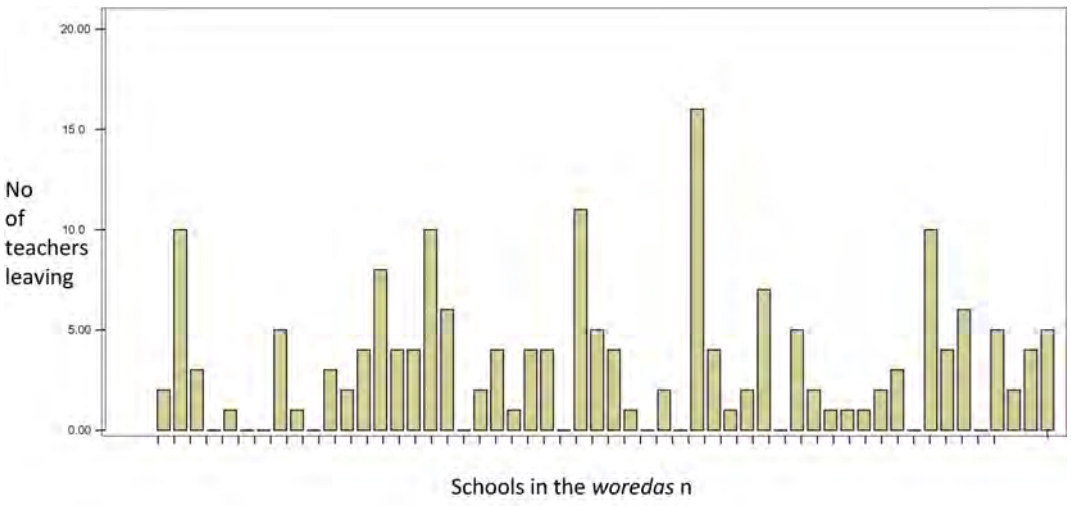
12.6 Findings and discussion

12.6.1 Rates of attrition

Twenty-nine of the 36 schools from Bolosso Sore and 29 schools from the 31 of Damot Gale completed the questionnaire (Appendix 12.2).[4] The number of teachers who left each school is shown in Figure 12.1, in which each bar represents one school. Bolosso Sore had an average attrition rate of 11 per cent, while Damot Gale had an average attrition rate of 25 per cent over the two-year period. If these rates continue, it would mean that Bolosso Sore would have 100 per cent staff turnover after around 15 years, while Damot Gale would have 100 per cent staff turnover in around eight years (although it is recognised that this does not take new recruits into account). National figures show only 18.2 per cent of teachers were found to have taught in the schools for more than five years (USAID and GEQAEA, 2008: 64). As the days in which teachers stayed in a school all their lives and received a gold memento when they retired are well gone, these rates are not alarming at the *woreda* level. In fact, these two *woredas* might be better off than some others in SNNPR, as they both have one of the three special towns used as administration centres in their vicinity and their WEOs are located in the towns of Areka and Boditi. Therefore, they have better access to urban facilities like stationers and the like.

However, at the school level, some schools have alarming attrition rates. The highest rate was in School 'm' in Damot Gale, at 75 per cent, with six of the school's eight teachers leaving in just two years. The highest rate in Bolosso Sore was School 'X', which experienced an attrition rate of 57 per cent. The second highest rate in the study sample was School 'b', which experienced a 60 per cent attrition rate when three of its five staff left. On the other hand, some schools have nothing to worry about: for example, Schools 'AA' and 'GG' in Bolosso Sore were able to retain all of their large staff numbers of 31 and 21 teachers respectively. Similarly, there were examples of schools in Damot Gale, such as Schools 'e' and 'y', with rates of 4 and 6 per cent, exhibiting negligible attrition rates

Figure 12.1 Attrition in both *woredas*



despite their staff sizes of 26 and 16 respectively. In fact, the single staff member who left the former school did not resign, but rather passed away.

Those schools with high attrition rates, or those with low attrition rates but with only few staff, like School 'W' (2) of Bolosso Sore and School 'f' (4), need to have safety measures in place to avoid major gaps being created in the learning and teaching process by the potential attrition of staff members. For instance, School 'b' experienced a 60 per cent attrition rate when three of its five staff left; 16 teachers left School 'X', which is quite a high number.

Figure 12.1 shows just what differences lie between and within these two *woredas* themselves, highlighting the 'complicating factor in understanding school-level effects on attrition is that, like students, teachers have different school experiences within the same school' (Kelly, 2004: 199). Therefore, a blanket decision made at a central point cannot be as targeted as a local one designed for a certain school.

12.6.2 Causes of attrition

Causes of attrition are shown in Figures 12.2 and 12.3, and in Appendix 12.3.

Having studied the attrition graphs in Figures 12.2 and 12.3 and discussed them with WEO staff, it would appear that both *woredas* consider the main cause of attrition (the major push factor) to be to move closer to urban areas – i.e. because of the general lack of infrastructure and facilities that are necessary for leading a reasonably comfortable life. This is not surprising as even in America, 'high-poverty schools were much more prone to mobility and attrition than affluent schools' (Swars *et al.*, 2009: 170). Therefore, the teachers are not leaving the teaching profession *per se*, but rather moving to other schools that have better amenities or that are closer to urban centres that provide these amenities. As this has implications more at regional level than at school level, it will not be expounded here. Some schools lack basic facilities, a case in point being a school that lacked latrines leading to the teachers rushing across the road to a hotel during break time. This in turn led to the waiters in the hotel locking their toilets and forcing the teachers to at least drink tea before allowing them to use the restrooms. Another was the distance that teachers had to walk from their accommodation to the schools; this is a matter of concern, as the distance teachers travel from home to school has been found to influence students' academic performance (USAID and GEQAEA, 2008: 6). So both Bolosso Sore and Damot Gale rated the reason of 'To be closer to urban areas' as the main cause for teachers leaving the schools.

Figure 12.2 Bar graph showing causes of attrition in Bolosso Sore

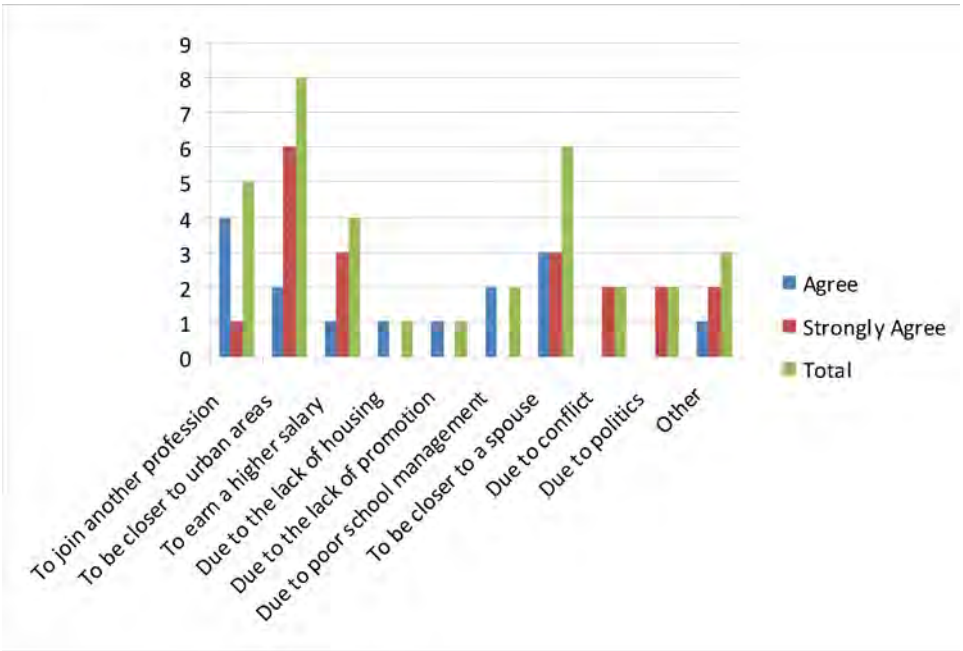
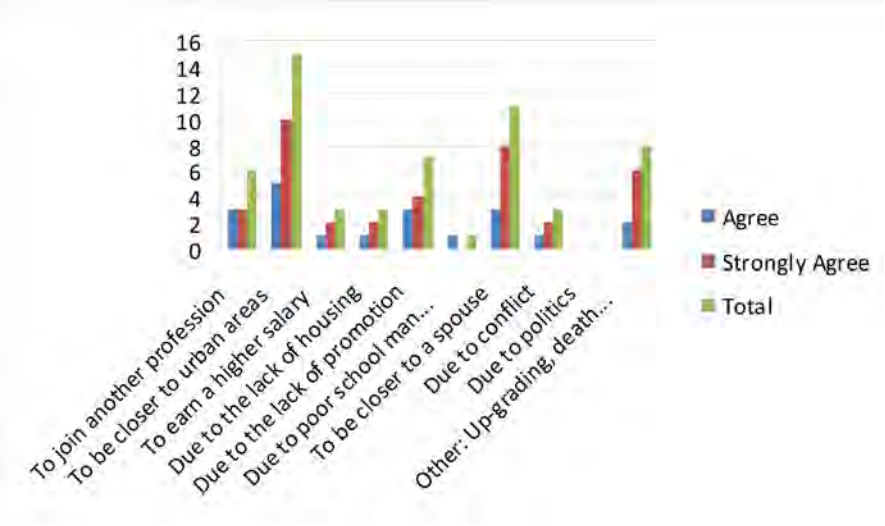


Figure 12.3 Bar graph showing causes of attrition in Damot Gale



Researchers have suggested that quality education as measured by standardised tests has shown to correlate more with economic growth than the number of years spent in school (Tikly, 2011: 5). This suggests that rural agrarian areas with low economic growth will also suffer from lower standards of education. This is worrying for zones like Wolaita, which suffer periodic famines and have a generally slow growth rate. Interventions like the new Growth and Transformation Plan are sorely needed, not only to boost the economic sector but also the education sector.

Interestingly, both *woredas* again agreed the second major cause for attrition to be the fact that teachers wanted to be closer to their spouses. Apparently, spouses are not willing to join the teachers due both to the lack of facilities, as well as the lack of employment in many areas. In addition to the romantic angle, the current cost of living is a factor that encourages teachers to move to their spouses. As they can hardly make ends meet, being with a spouse allows them to economise on things like food and board. During discussions, the directors explained that it is not necessarily only their spouses but also their parents and extended families that teachers seek to be near to for the above mentioned reasons. Remarkably, the issue of low salaries was not raised here, probably due to the fact that all the schools in the study were government schools on the same salary scale. However, research elsewhere shows that the effect of salary on attrition is minimal, though it probably determines the calibre of the teacher recruited in the first place (Kelly, 2004: 213–214).

Most of the other reasons were not seen as particularly significant to teachers leaving, except to join another profession. Even this was not as significant in terms of numbers leaving as it was in making teachers restive: when a teacher saw one of their number suddenly earning many times their salary, it made them consider other opportunities. An example given was a teacher who had managed to somehow buy a 'Bajaj' (motorbike-rickshaw) and was now on the 'gravy train'.

Noticeably, no-one in Damot Gale ticked 'Politics' to be a cause of attrition, while two directors in Bolosso Sore stated that this was a significant push factor. Since the controversial 2005 elections (Clapham, 2006: 31), there has been a drive to encourage most civil servants, especially directors, to join the ruling party, so it is possible that some directors opted to avoid commenting on this factor. However, the 2010 elections, as well as other political activities, did in some ways encroach on the school year, forcing teachers to rush through textbooks in minimum time and causing general feelings of discontent. In other countries, it has been noted that fear associated with expressing concerns to administrators and feelings of disempowerment led to low morale, expressed in passivity and reservations in speaking out and eventually becoming a reason for leaving the school (Swars *et al.*, 2009: 175).

Thus it would appear that the lack of facilities and the desire to be near one's spouse or family are the two major causes for the attrition – or rather turnover – of teachers. The nationally stated reasons of a lack of respect for the profession, the absence of training and promotion, and students' disciplinary problems (USAID and GEQAEA, 2008: 65) seem to have given way in this zone to the more fundamental question of how to get access to basic facilities and make ends meet. It is essential to ensure that the teachers are functioning efficiently as:

> Recent research suggests that teachers exert an influence on student achievement ... but the evidence is not always clear regarding the observable characteristic of effective teachers. Studies that have examined available indicators of teacher preparation or quality, such as academic ability, certification status and experience, find that the effects of those indicators are often mixed or very small (Guarin, Santibanez and Daley, 2006: 176).

12.6.3 Schools with extremely high and low attrition rates

To triangulate the reasons with the reality on the ground, the schools that had no or almost no turnover (less than five per cent) and those that had high turnover (greater than 25 per cent) in both *woredas* were put into two categories and scrutinised with the help of LINK project staff. The results are shown in Table 12.1. Thirteen schools were found to have negligible attrition, while 19 schools had a high turnover rate.

The project staff confirmed that the schools with almost no attrition were those with better facilities in terms of accommodation, transport and the like, or those very close to the special town administrations. Moreover, they pointed out that some of these schools were newly established and the teachers were still highly motivated to overcome the challenges experienced when one starts out afresh. Thus it is clear that Guarin, Santibanez and Daley's (2006: 201) observation holds true that individual schools and districts can influence their attractiveness to staff by the style of management they use.

On the other hand, those schools with high attrition lacked basic infrastructure and facilities due to their remoteness or being situated in difficult terrain – notably, those on Mountain Damot. As a result, teachers opted to live in places with relatively better facilities and commute. This obviously leads to fatigue and disillusionment, as commuting

Table 12.1 Table of schools with extreme attrition and retention rates

	Schools with negligible attrition (<5%)		Schools with high turnover (>25%)
1	School c	1	School a
2	School A	2	School b
3	School f	3	School R
4	School G	4	School j
5	School M	5	School l
6	School S	6	School m
7	School V	7	School J
8	School W	8	School K
9	School AA	9	School r
10	School Z	10	School U
11	School Y	11	School p
12	School CC	12	School X
13	School GG	13	School u
		14	School w
		15	School z
		16	School bb
		17	School cc
		18	School dd
		19	School ee

often means a long and tiring walk to and from school every day, whatever the weather conditions.

Perhaps in addition to reconfirming the causes of attrition, this exercise brought to light the fact that most teachers in the new schools had not transferred yet. This could indicate that if enthusiasm and commitment to view hardship as a challenge to be overcome can be instilled in all teachers, difficult circumstances may not jade them so quickly.

12.6.4 Cluster recommended solutions for attrition

All supervisors, directors and deputy directors sat in their cluster groups to brainstorm what should be done to reduce the rate of attrition in their own clusters. They wrote suggestions in various order on posters. These are presented in Table 12.2.

It is interesting to note how similar the recommendations across all the clusters are. Apparently, most head teachers feel that they know what is to be done, but just do not know how to do it. Most of the recommendations are more at a policy or goal level rather than practical projects that can be implemented at the school, cluster or *woreda* level. Moreover, they reflect both a high level of dependency on external bodies to provide solutions, as well as near impossible expectations of what can be achieved in a developing country like Ethiopia, especially in light of the fact that the region is already spending 28.2 per cent of its budget on education (SNNP REB, 2009: 11). In fact, the recommendations appear more like a dream list that a 'to-do' list. There is a clear need to address the 'expectation gap' to ensure illusions are not being created among any of the stakeholders, especially the community. Otherwise, the disillusionment that is certain to follow can only impact negatively on the educational system.

Clapham notes:

> Ethiopia's shortcomings are apparent. Its proverbial and continuing famines and its lowly position on any league table of global per capita testify to its inability to promote even the most basic of necessities for most of its people (2006: 17).

Nevertheless, the recommendations do reflect the extremely difficult conditions in which teachers are expected to provide quality education. Without basic infrastructure and facilities such as clean water, housing, lighting and shops, relative increases in the quality of education can arguably sometimes be little more than a positive interpretation of statistics or a temporary reaction to special interventions.

A few recommendations like constructing teacher accommodation have been tried by some schools and communities, but they lack lighting and water. Others were discussed with the *woreda* and zone representatives, like respecting teachers' rights, strictly implementing transfer regulations, improving school governance and peaceful conflict resolution. However, they pointed out that most required time, although LINK's training and intervention in the *woredas* were moves in the right direction and included most of these points. Unfortunately, however, some of these gains were being diluted by the director attrition. Others solutions, such as transferring teachers only after they had served for a minimum of three years in a school, could cause disenchantment among senior teachers in schools with harsh conditions, as fresh graduates might be appointed to schools with better services. This meant that teachers were often transferred before the three-year period. Furthermore, participants firmly believed that incentives like hardship allowances and spouse allowances would improve matters, but their budgets hardly covered their recurrent costs, let alone additional ones.

Thus it would seem that there are no quick fixes and that hopefully conditions in the schools and teaching will improve with the gradual socio-economic development of the country as a whole. However, Clapham (2006: 38) again rightly cautions that though there are certainly some limited and practical steps actors might be able to take, they must retain a modest assessment of what can be achieved.

Table 12.2 Table of cluster recommendations

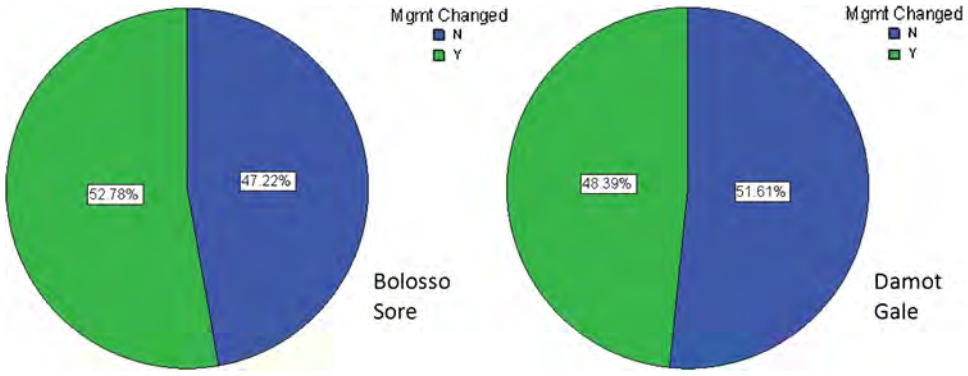
Achura Cluster • Building housing for teachers • Providing clean water • Holding markets near the schools • Establishing clinics • Improving community support • Improving school governance • Setting up recreation centres	Ade Damot Cluster • Building housing for teachers • Providing facilities available in towns • Setting up recreation centres
Bancha Cluster • Improving school governance • Building housing for teachers • Setting up recreation centres • Holding markets near the schools • Improving the flow of information	Buge Cluster • Building housing for teachers • Providing basic necessities • Peaceful conflict resolution • Upgrading all schools from 1–12 • Community respect • Improving school governance • Improving school environment
Cherake Cluster • Building housing for teachers • Providing clean water • Improving community support	Dolla Cluster • Providing facilities and infrastructure such as housing, water and lighting • Improving fringe benefits • Upgrading all schools 1–8
Gacheno Cluster • Building housing for teachers • Improving conflict resolution • Providing facilities such as housing, water and lighting • Improving school governance • Setting up recreation centres • Implementing transferring regulations properly • Respecting the rights of teachers	Gara Godo Cluster • Building housing for teachers • Providing clean water • Improving school governance • Improving fringe benefits • Providing encouragement and incentives • Building the capacity of staff
Jage Cluster • Improving school governance • Improving community relations • Providing facilities and infrastructure like roads, water, housing and clinics • Providing rewards • Increasing problem-solving in schools	Legama Cluster • Improving teaching learning • Providing basic necessities • Improving school governance, efficiency and respect • Setting up recreation centres
Shasha Cluster • Peaceful conflict resolution • Providing facilities and infrastructure such as housing, water and lighting • Improving community support	Wendara Cluster • Building housing for teachers • Setting up recreation centres • Improving school governance • Developing a spirit of co-operation • Providing encouragement and incentives

12.6.5 School management attrition

LINK has provided four modules on director training, and in order to reduce the effect of attrition has also trained deputies in schools (where they exist) to ensure continuity in management should the director leave. If either the director or the deputy continued in place for the two years of the training, management change was not registered in those schools. Management change is shown in Figure 12.4.

Nineteen schools in Bolosso Sore (three directors were absent during this session) and 15 of the 31 schools in Damot Gale had experienced management change (see Appendix 12.4), indicating that almost half the schools in both *woredas* had experienced

Figure 12.4 Management change in Bolosso Sore and in Damot Gale



management change (53 per cent and 48 per cent respectively. They consequently lost some institutional memory and at the same time did not completely benefit from the training. Most of the new directors said that they had not found any documentation or copies of the previous training materials on taking up office. It is also important to consider the attrition rates for directors themselves.

Ironically, it would appear that directors who are trying to reduce teacher attrition are rapidly seeking better conditions for themselves at more than double the pace of their teachers. The problem probably goes even higher, as around 60 per cent of the supervisors had also changed as well as one of the *woreda* heads, who had been replaced by their predecessor.

A fluid state of management undermines consistency and continuity throughout the school system and ought to be stabilised quickly. Hopefully, now that the business process re-engineering and the business score card exercises (both of which are recent government administrative reform programmes) are almost complete, attrition will show a decline.[5] However, strengthening of the education management information system (EMIS) is vital if there is to be well documented data for future comparisons and making evidence-based decisions.

12.7 Limitations

Most of the numbers for attrition were obtained from the memories of the directors and their deputies, so may not be completely accurate. At times, directors with their deputies were seen disputing numbers of staff who had left, alongside the reasons. However, it is hoped that this will not detract from the overall picture of the situation. Moreover, some of the responses seemed to suffer from self-censorship.[6]

12.8 Conclusion and recommendations

It would appear that teacher attrition is one of the many factors that is undermining the quality of education in the Wolaita Zone of SNNPR. This is due to the fact that teachers are leaving their schools, not so much to join other professions as to join another school that is closer to better social services and/or their family. This movement is usually carried out by transferring from one school to another within the government education system. On average, the *woredas* of Bolosso Sore and Damot Gale had attrition rates of 11 and 25 per cent respectively over a two-year period; this was much less than that of the schools' senior management, which had respective attrition rates of 48 and 53 per cent over the same period.[7]

Consequently, although teacher attrition may be one of the problems within the educational system, it may not be as big a challenge as might be supposed. In fact, it is possibly being used as a scapegoat for other underlying issues such as qualified but poorly trained teachers, inadequate teaching materials and the poor facilities of a country that is underdeveloped as a whole. Moreover, as Ingersoll and Preda point out, research does not

suggest that all teacher turnover is negative or that 100 per cent retention could, or should be, a goal of schools, (2010: 590).

Unfortunately, school management seemed to be looking for a panacea to be handed down from above and drew up a list of what they would *ideally* like when asked to suggest recommendations for reducing attrition. Although many schools have made commendable initiatives such as building staff accommodation and classrooms with support from the community, they also ought to investigate less capital-intensive and more creative solutions that could both minimise staff attrition as well as mitigate its negative effects. Examples of the former might be to involve staff's spouses in income-generating activities for the schools, like running cafeterias and ploughing the school plots, as well as actively creating and pursuing projects like obtaining solar panels for schools or bicycles for their teachers. Examples of the latter could include making sure staff improve documentation of training, lesson plans, student report cards and student files, which will assist new staff in taking over and catching up more easily, as well as conducting exit interviews with staff leaving and finding solutions to the push factors.

There is definitely the need to improve upon the existing EMIS system of gathering data by including better documentation of the characteristics of teachers likely to stay on in as well as leave the system, through means used in other countries like surveys on schools and staffing, and teacher follow-up after they leave the system.[8]

However, much more important is actually putting the data into use to plan and make locale-specific corrective modifications to existing policies to get the most out of them. For instance, if it is the best rather than the worst teachers who leave the schools, the existing transfer policy might be revisited with the teachers to ensure a longer duration with under-privileged schools with the possibility of a future accelerated transfer to a school closer to an urban centre.[9]

At the zonal level, there is the need to further differentiate between those teachers who are leaving the profession due to retirement and death, or in search of greener pastures, and those simply being transferred, as the latter do not detract from the actual teaching force of the zone. This is important, especially in Wolaita where the medium of instruction is unique to the zone and teachers cannot be brought in from other areas. Consequently, there may be the need to review sources of teacher recruitment and use different approaches like that of part-time hiring of qualified and effective teachers working in other sectors.

However, these are simple ideas emanating from the outside, while lasting change can only come from schools investigating their particular contexts and coming up with creative school-grown solutions that have been reached through participatory processes with all stakeholders. It is only through such processes that they can develop the capacity to tackle the multiple challenges, including attrition, that will crop up time and time again in this dramatically ever-changing world.

Notes

1 Source of national statistics: Ministry of Education Ethiopia, 2010.
2 This assumes qualification at the standard of successful completion of a one-year teaching certificate. However, new regulations in Ethiopia for primary school teacher qualification set the minimum standard as successful completion of a three-year teaching diploma.
3 A *section* in Ethiopia is a class of students. As many schools operate a double-shift system, the pupil-section ratio is used rather than the teacher-pupil ratio, as it can be considered to be a proxy for actual average class size. *Pupil-section ratio* is the average number of pupils in a given level per section in the same level. It is calculated by dividing the total number of pupils in a given level by the total number of sections available in the same level.
4 For the purposes of this paper, school names have been replaced by letters, with schools in Bolosso Sore given upper case letters and those in Damot Gale lower case letters.
5 It should be noted that the impact of these reforms will probably have had an effect on the data gathered in the study, but that this effect is difficult to gauge. As this impact is likely to be one-off, it has an effect on the degree to which the study findings can be held to represent long-term trends.

6 Additionally, the degree to which the business process re-engineering reform affected teacher movement could not be recorded. Also, the study chose to focus on rural areas; a similar study in urban areas would provide useful data for comparison.
7 Twenty-five per cent teacher attrition is still notably high.
8 It would also be interesting to see what kind of teachers leave school for a different profession, given that many teachers are engaged with other income generation projects or migrate to another country. In addition, new selection policies for entrance into pre-service teacher training will target students who wish to become a teacher, rather than allocating certain students to teacher training courses on the basis of their grades. A longitudinal survey would be useful to measure the long-term effect of this policy on teacher attrition, as these newly qualified teachers filter down into schools. Finally, the impact of teacher attrition on education quality, access and inclusion could usefully be the subject of further research.
9 However, given the problems noted above, this may not be a sufficiently effective or provide an immediate incentive. It might still be necessary to review teacher deployment policies to ensure fairness, reasonability and transparency.

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Appendices

Appendix 12.1 Teacher Attrition Form

A: In pairs with your deputy director, please fill out the following questionnaire for some research and self-reflections.

1. Name of school: _____
2. Number of teachers present in school: _____
3. Number of teachers who have left the school since last academic year: _____
4. Now please grade the reasons that you feel were the main ones for the teachers to leave your school by ticking the appropriate boxes:

	Reason for leaving the school	Strongly Disagree	Disagree	Agree	Strongly Agree
1	To join another profession				
2	To be closer to urban areas				
3	To earn a higher salary				
4	Due to the lack of housing				
5	Due to the lack of promotion				
6	Due to poor school management				
7	To be closer to a spouse				
8	Due to conflict				
9	Due to politics				
10	Other				

B. In your clusters along with your supervisor, please describe the factors that you feel would be the most relevant to keep teachers from leaving your school:

_____

_____

_____

_____

_____

_____

_____

Appendix 12.2 Attrition rates over two academic years

Schools in Bolosso Sore	Left	Present	%	Schools in Damot Gale	Left	Present	%
School A	0	9	0	School a	10	26	39
School B	NG	NG	NG	School b	3	5	60
School C	5	23	22	School c	0	9	0
School D	2	29	7	School d	NG	NG	NG
School E	NG	NG	NG	School e	1	16	6
School F	NG	NG	NG	School f	0	4	0
School G	0	32	0	School g	NG	NG	NG
School H	1	9	11	School h	3	27	11
School I	2	22	9	School i	NG	NG	NG
School J	4	16	25	School j	4	9	44
School K	8	30	27	School k	4	20	20
School L	NG	NG	NG	School l	10	22	45
School M	0	3	0	School m	6	8	75
School N	2	34	6	School n	1	6	17
School O	4	20	20	School o	4	31	13
School P	NG	NG	NG	School p	11	21	52
School Q	NG	NG	NG	School q	1	8	13
School R	4	45	9	School r	5	17	29
School S	0	29	0	School s	2	25	8
School T	NG	NG	NG	School t	4	23	17
School U	4	14	29	School u	7	19	37
School V	0	33	0	School v	1	16	7
School W	0	2	0	School w	5	10	50
School X	16	28	57	School x	2	21	10
School Y	2	10	20	School y	1	26	4
School Z	0	7	0	School z	3	8	38
School AA	1	31	3	School aa	4	9	44
School BB	1	28	4	School bb	10	28	36
School CC	0	7	0	School cc	6	18	33
School DD	2	20	10	School dd	4	7	57
School EE	NG	NG	NG	School ee	5	20	25
School FF	NG	NG	NG		**117**	**459**	**23**
School GG	0	21	0				
School HH	NG	NG	NG				
School II	5	49	10				
School JJ	2	30	7				
	65	**581**	**13**				

NG = No grade due to figures being unavailable.

Appendix 12.3 Perceived reasons of attrition

	Reason for leaving the school Bolosso Sore	Agree	Strongly agree	Total
1	To join another profession	4	1	5
2	To be closer to urban areas	2	6	8
3	To earn a higher salary	1	3	4
4	Due to the lack of housing	1	0	1
5	Due to the lack of promotion	1	0	1
6	Due to poor school management	2	0	2
7	To be closer to a spouse	3	3	6
8	Due to conflict	0	2	2
9	Due to politics	0	2	2
10	Other	1	2	3
	Reason for leaving the school Damot Gale	**Agree**	**Strongly agree**	**Total**
1	To join another profession	3	3	6
2	To be closer to urban areas	5	10	15
3	To earn a higher salary	1	2	3
4	Due to the lack of housing	1	2	3
5	Due to the lack of promotion	3	4	7
6	Due to poor school management	1	0	1
7	To be closer to a spouse	3	8	11
8	Due to conflict	1	2	3
9	Due to politics	0	0	0
10	Other: Upgrading, death and transfer	2	6	8

Appendix 12.4 Management change over two years

Schools in Bolosso Sore	Mgmt Changed	Schools in Damot Gale	Mgmt Changed
School A	Y	School a	Y
School B	N	School b	Y
School C	N	School c	N
School D	N	School d	Y
School E	Y	School e	Y
School F	N	School f	Y
School G	Y	School g	N
School H	N	School h	N
School I	Y	School i	Y
School J	N	School j	N
School K	N	School k	Y
School L	N	School l	Y
School M	Y	School m	Y
School N	Y	School n	Y
School O	Y	School o	N
School P	Y	School p	Y
School Q	N	School q	Y
School R	Y	School r	N
School S	N	School s	N
School T	N	School t	N
School U	Y	School u	N
School V	N	School v	N
School W	Y	School w	N
School X	N	School x	N
School Y	N	School y	N
School Z	Y	School z	N
School AA	Y	School aa	N
School BB	N	School bb	Y
School CC	Y	School cc	N
School DD	Y	School dd	Y
School EE	N	School ee	Y
School FF	Y		**15/31**
School GG	Y		
School HH	Y		
School II	N		
School JJ	Y		
	19/36		

13. Challenges facing higher education in the Southern African Development Community

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Abstract

In many African countries, general and higher education had witnessed a long period of relative neglect and stagnation, which resulted in a gross decline in the quality of the education. As a consequence, the South African Development Community (SADC),[1] higher education community and other stakeholders sought new mechanisms to improve the quality of education in the region, to counter the perceived decline and the variances in the quality of the higher education sectors. An analysis of data mapping out the higher education landscape of the SADC region identifies that the availability of qualified teachers at all levels of the system is one of the key factors enabling and challenging the potential of the higher educational sector, both in terms of development of the sector itself and the role that higher education can play in the regional development.

The higher education practitioners in the SADC region realise that assuring quality education is the key to achieve policy goals such as student and staff mobility and the portability of qualifications, to regulate private provision, to assure qualification equivalence frameworks and to increase co-operative teaching and learning. Up to date SADC has done the groundwork in the establishment of the current practices to propose a strategy to assure the quality for the provision in the region, but much needs still to be done to address the different challenges facing the sector, to ensure sufficient numbers of qualified pedagogical staff, to improve quality assurance practices, to address the capacity needs and to develop the national systems in such a way that it could be comparable.

Key words
Higher Education, Quality of Education, Quality of Provision, Shortage of Qualified Staff, Challenges, SADC

13.1 Introduction

The intended aims of higher education in developing countries are to provide for individual aspirations and needs for self-development, to supply high-level skills for the labour market, to generate useful knowledge that is of social and economic benefit and to develop critical citizens. However, when reviewing higher education and specific quality assurance systems in such countries, it is evident that no education system can escape certain global developments that change the perceived requirements for quality education. The following seem to be some of the most important global drivers with a specific application in developing countries in Africa:[2]

1. growth in the sector (tertiary education in some form or another has now become a mass phenomenon in many countries);
2. increasing diversity (the increasing volume and diversity of the student population, including international students, have led many institutions to review and diversify not only their programme offerings, but also the internal organisation);
3. demand for greater transparency and accountability (in line with international trends, institutions have moved to strengthen their reporting and accountability procedures);

4. enhancement of academic quality (establishment of quality assurance systems and structures to assure the quality of qualifications);
5. the impact of technology (major developments in information technology have led to changes in study requirements, teaching and learning arrangements, etc.);
6. changes in academic employment (there has been a strong trend towards reducing the balance of tenured academic posts, while increasing the number of short-term academic and administrative posts on contract, with career implications); and
7. new providers and new structures (the advent of non-traditional providers of higher education, for example the emergence of virtual universities, the growth of private institutions, the growth of multi-campus and transnational institutions and franchising) (Fourie, Van der Westhuizen and Strydom, 2002: 185–6).

The growth of the above-mentioned global demands on higher education is having a profound effect on SADC institutions and may sustain the pressure for more distorted practices (GUNI, 2009: 184–5) – a situation mainly influenced by the local context of the region and the individual countries, as discussed below.

13.2 SADC contents

Unfortunately, for many African countries during the previous four decades, general as well as higher education has witnessed a period of relative neglect and stagnation resulting in a gross decline in the quality of the education. According to information provided by the Association for African Universities (AAU), this decline in higher education originated at a time when institutions were experiencing escalating enrolments, declining resources and academic brain-drain, among other factors. The fiscal constraints faced by many countries in Africa, coupled with the expansion in demand, have led to overcrowding, deteriorating infrastructure, lack of resources for non-salary expenditures and a decline in the quality of teaching and research activities in many countries (AAU, 2009: 1). Furthermore, some countries began to face problems with educational quality during the 1990s, stemming from the rapid growth of private higher education institutions, unlicensed institutions, unqualified academic staff, sub-standard curricula and lack of essential facilities. This led to calls for a higher quality of graduates from employers, together with governments' recognition of the need to be internationally competitive and to meet the demands of knowledge societies (Materu, 2007: 17).

As a consequence, different African higher education communities and other stakeholders sought new mechanisms to improve education quality in order to counter the perceived decline. Most departments and ministries of education in the SADC countries had been given – or assumed – greater power over education, making them the major force behind the establishment of different levels of quality assurance structures. These decisions were increasingly driven by politics, rather than knowledge needs or the national capacity to support education institutions (Materu, 2007: 17).

13.3 Levels of higher education quality assurance development in SADC

According to research by the Southern African Regional University Association (SARUA) there are 66 public universities, 119 publicly funded polytechnics or colleges and 178 private universities or colleges in the 15 SADC countries (MacGregor, 2009: 1).

Currently, varying levels of quality assurance development exist in higher education sectors of SADC. It is generally accepted in SADC that the South African quality assurance system is more advanced and elaborate than other quality assurance systems in the region. Countries such as Namibia and Botswana have already made progress with the finalisation and implementation of certain quality mechanisms, such as higher education governing acts, qualification frameworks and institutional policies, although with variable success. In Malawi, Lesotho, Zimbabwe and Zambia, specific individual activities are in place in order to manage the quality of the institutional core functions, as well as the

creation of higher education authorities to manage and co-ordinate these processes. The limited human resources and available financial capacities within these countries force them to start small and build the quality assurance system over time, using a stepwise approach (HEQMISA, 2009: 3–4). However, the two Portuguese-speaking countries in the region, Angola and Mozambique, are both associated with the Southern African Development Regional Quality Assurance Network and are being helped by this network to revitalise and develop the leadership of the institutions and to modernise their education and training systems (Okebuko, 2009).

At national levels, more than half of the SADC countries have already established, or are in the process of establishing, a quality assurance framework. There is also a vision for a regional qualifications framework, but the progress toward its adoption is slow. This is a result of a lack of understanding of different systems currently in use in SADC and no consensus on shared terminology (Manyukwe, 2009: 3–4). The success of such a regional qualifications framework will depend on the extent of development of quality systems within each of the SADC member states (SARUA, 2008: 110).

At the institutional level, 76 per cent of the institutions have already established some kind of quality system or mechanism. However, much needs to be done to improve quality assurance practices while developing implementation capacity and raising national systems to a comparable standard (Manyukwe, 2009: 4; MacGregor 2009: 3); issues that complicate the movement of staff between different institutions and countries of the region.

13.4 Quality assurance initiatives

Regional co-operation to strengthen and develop the concept of quality in higher education in the SADC region had already commenced by the end of 2002. Since its establishment, HEQMISA has organised a series of conferences and workshops in the region in line with the Millennium Development Goals (MDGs) and the SADC Protocol on Higher Education. HEQMISA's aims are to promote the enhancement of capacity in higher education institutions to develop, manage and implement high quality and innovative curricula as well as programmes and service management through regional networking and co-operation, mainly funded by German technical co-operation (HEQMISA, 2003: 6; 2007: 9–10).

Assuring quality is the key to achieving national and institutional policy goals such as student and staff mobility and qualification portability, qualification equivalence frameworks, regulating private provision and increased co-operative teaching. SADC is already engaged in this process and has done the groundwork to develop and establish practices and to propose a strategy for the region. Therefore, qualification comparability is an important objective of SADC and necessary to achieve mobility, credit transfer and student access. This has led to a vision for a regional qualifications initiative. Progress towards such an adoption has been slow, impeded by the lack of strong national quality assurance systems. Piyushi Kotecha, Chief Executive Officer of the Southern African Regional University Association (SAURA), explains the reason for the slow pace of development, arguing that:

> Experience has however taught us that the silos that come with territorial boundaries and national and political agendas are notoriously difficult to break down... It is likely these dynamics would characterise all regional harmonisation efforts (MacGregor, 2010: 2).

This harmonisation of higher education is seen by some academics and institutional managers as a way to counter the negative impact of student and staff mobility and a regional integration arising out of a lack of mutual recognition of the various forms of certification (Dell, 2010: 2). The proposed regional framework would have to be a single framework, but could also be a meta-frame enabling national frameworks to relate to the needs of the different countries. Co-ordination between regional frameworks will become

increasingly important; for example the impact of the European Bologna system has influenced some SADC countries towards adopting it (MacGregor, 2009: 3). Although there is some co-ordination, there is a lack of understanding of different systems used in SADC as well as a lack of consensus on shared terminology.

Other regional initiatives try to address these SADC problems. For example, in 2005, governments, teacher unions and private sector employer representatives from 13 SADC countries and Nigeria met in Pretoria, South Africa, under the auspices of a programme initiated by the International Labour Organization (ILO) on teacher shortages and the Education for All goals. The *Pretoria Declaration on Teachers,* accepted during this meeting, identifies factors surrounding teacher provision as key. Conclusions and recommendations included:

- Teachers make the difference in quality education for all. Sufficient numbers of well-qualified, adequately remunerated, highly motivated and professional teachers are key to realising quality education for all.
- Teacher shortages are a threat to educational goals.
- The educational systems, structures, context and cultures of each country are different and the solutions to shortages of qualified teachers must accommodate national conditions.
- The supply and demand of teachers differs by country. Shortages exist in some countries as a result of demographic and political pressures, environmental and health factors such as HIV & AIDS. In other countries, a surplus of teachers exists.
- Recruitment and retention of qualified teachers for positions in rural, remote and geographically-challenged areas are becoming increasingly difficult, particularly within certain chronic shortage subjects, such as mathematics and sciences.
- Adopting and applying solutions to these and other challenges in the higher education area requires a strong partnership among the different countries involved.

The forum agreed that the participating countries should advance efforts to design and implement a mutually beneficial teacher mobility framework for qualification recognition, licensing, recruitment and migration of teachers across borders. Furthermore, education authorities need to assess more carefully the scope and impact of teacher mobility on education and adopt policy solutions to maximise benefits and minimise negative impacts. Such solutions should respect the needs and interests of all countries and individual teachers and should be developed using the Commonwealth Teacher Recruitment Protocol as a model (ILO, 2005: 1–5).

To date, there is limited evidence to validate and sustain the claim that the movement of academics can serve as a measure for building the capacity of higher education institutions in the developing country context. In the SADC higher educational sector, where there is a great need for additional academic resources, academic mobility could address the region-wide lack of suitably qualified higher education staff. In reality, this is a daunting task for SADC higher education institutions to address and manage in an environment with major financial constraints and increasing global competitiveness.

13.5 Staff capacity as a factor influencing the potential of higher education

Through data mapping the higher education landscape in the SADC region, we can identify that the availability of qualified teachers, at all levels of the system, is key to enabling and challenging the higher education sector, in terms of both sectoral and regional development.

There is a critical shortage of qualified staff throughout the SADC. Although it currently seems that there is a lack of verified general statistics on academics in higher education here, Nganga (2011: 1) indicates that there are some 32,500 academic and research staff

in the SADC region. The main reasons for staff shortages are a lack of resourcing, poor working conditions and a lack of facilities for research. This is exacerbated by 'brain drain' and the impact of external factors such as HIV & AIDS. Of those academics available within the region, only 26 per cent have PhDs and the overall staffing component has great gender imbalances. Some governments admit the challenge and acknowledge that the 'quality of learning in some universities has been declining. There is a shortage of doctoral level lecturers as a result of rapid expansion and brain drain' (National Strategy for University Education, quoted in Nganga, 2011: 1). Attracting and retaining highly qualified and experienced staff is a priority, but it is unlikely to occur in the absence of resources. The various institutions involved in the region apply different mechanisms to attract and retain qualified staff. These could be enhanced through development initiatives, exchanges, qualifications upgrading schemes and regional mechanisms for staff mobility (MacGregor, 2009: 2).

At the national level, the ministries of education have recognised these factors as challenges to improving the numbers of academic and other staff numbers and capacity. Critical staff shortages have already been identified in various areas and disciplines, but a lack of resources prevents institutions from attracting experienced and well-qualified academics to the higher education sector. As mentioned earlier, the two main subfactors impacting on staff numbers and capacity within the sector are brain drain and HIV & AIDS (SAURA, 2008: 120). The highest brain drain is migrants moving from Zimbabwe to South Africa (of which 40 per cent are professionals, mainly teachers and health workers) and Malawi (primarily as lecturers and private secondary school teachers). Other migrants include Kenyans (who prefer to study and work in universities to the south that guarantee quality learning and are prestigious, or who move to Mozambique to work as electricians, engineers, architects and teachers) (UN Women, 2010: 1; Landau and Kabwe-Segatti, 2009: 28; Nganga, 2011: 1; FMSP, 2009: 58).

Staff and student mobility is seen within the SADC region as key to achieving many of the goals of regional higher education. One of the major challenges is developing a community of scholars, through staff exchanges and visits, that could provide support for staff in areas and fields where capacity is low as well as helping to maximise the use of expertise where it is most needed. Mobility might help to share capacity, reduce duplication, develop a regional identity and promote cultural understanding. As shown by the European Community Action Scheme for the Mobility of University Students (ERASMUS) in Europe, mobility can act as a quality improvement mechanism. Constraints include visa and immigration formalities; difficulties in travelling, including its cost; and the lack of qualification comparability and of agreed quality assurance systems. To be able to monitor these movements, there is a need for more data on the actual mobility of staff and students in the region.

Mercy Mpinganjira identifies in the SARUA Leadership Dialogue Series (SARUA, 2011: 34–6) certain issues that need to be managed in order to promote increased academic mobility in the SADC region, namely:

- *Funding:* Dedicated funding is a key factor in efforts aimed at promoting academic mobility (of both staff and students).
- *Recognition of qualifications:* The ability of staff to move to or of students to enrol in international institutions very much depends on the qualifications recognised as equivalent or comparable to the normal qualifications required of local staff and students.
- *Quality assurance:* Enhanced academic mobility very much depends on effective quality assurance structures that are properly harmonised in terms of agreed minimum standards as well as procedures for evaluating quality to enhance recognition of qualifications/credits, along with regional co-operation.
- *Immigration policy laws:* Promotion of academic mobility requires relaxation of migration laws and regulations by governments in order to enhance and facilitate freer movement of academics for research, teaching and study.

- *Improving direction of mobility flows:* The quality of education and research infrastructure offered in major hosting countries means that staff and student mobility is outward from SADC countries to South Africa or Western countries, mainly the United Kingdom, United States, France and Australia.
- *Mobility services:* There is an urgent need for higher education institutions to develop and monitor services aimed at supporting international academic mobility and experiences.
- *The academic calendar:* Differences in academic calendars of higher education institutions in the region make academic mobility, especially for short-term teaching and study mobility programmes, difficult to co-ordinate.

To overcome the academic shortages, many SADC countries are participating in regional co-operation and cross-border education on an ad hoc basis. The SADC Treaty, SADC Regional Indicative Strategic Development Plan (a focus on environmental education for sustainable development), a current initiative for the development of a Regional Qualifications Framework (by the SADC ministers responsible for education and training) and the SADC Protocol on Education and Training ask for co-operation across the region in areas of teacher education, professional development of educators, knowledge exchange and development and sharing of learning materials (SADC, 1997: 5–6; SADC, 2010: 1).

13.6 Challenges facing the SADC higher education institutions

An analysis of the data, selected literature and policy documents of the SADC countries gathered through the HEQMISA initiative identified a variety of problematic areas that are challenging SADC higher education institutions in assuring the quality of the core functions:

- *Vast differences in quality within the institutions:* Given that quality assurance is relatively new in the university sector in Africa, it is not uniformly implemented and vast differences in levels of quality exist within institutions.
- *A complex historical legacy:* Many of the institutions are located deep in rural areas, making it extremely difficult to attract well-qualified and experienced staff, impeding quality and activities.
- *Different interpretations of quality:* The divide between the more established institutions with a certain level of existing quality experience and those with a lack of quality assurance expertise and systems leads to challenges in negotiating a middle ground to satisfy the dual goals of accountability and improvement; a task that international experience has shown to be fraught with pitfalls.
- *African allegiance:* Although international comparability is important for institutions, it should also be stressed that the countries' 'Africanness' should not be forgotten.
- *Availability of qualified staff:* There is a challenge in attracting the experienced and well-qualified academics that are needed to improve academic and other staff numbers and capacity in the higher education sector, especially in certain disciplines.
- *Sustaining education:* Another challenge is in finding innovative and creative ways for sustaining education as an apex priority at national and regional levels in the midst of economic challenges.
- *Burgeoning bureaucracy:* Many academic administrators in these institutions are in only the early stages of familiarity with quality assurance principles, procedures and debates.

13.7 The way forward

Higher education practitioners in the SADC region realise that assuring quality education is key to achieving policy goals such as student and staff mobility and the portability of qualifications, the regulation of private provision, the assurance of qualification

equivalence frameworks and the increase of co-operative teaching and learning. To date, SADC has done sufficient groundwork in the establishment of the current practices to propose a strategy to assure quality provision in the region, but much still needs to be done to address the different challenges facing the sector, to ensure sufficient numbers of qualified pedagogical staff, to improve quality assurance practices, to address capacity needs and to develop national systems in such a way that they could be comparable with international benchmarks.

Notes

1 SADC consists of the following member states: Angola, Botswana, Democratic Republic of the Congo, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, Tanzania, Zambia and Zimbabwe.

2 During the last decade, the Higher Education Quality Management Initiative for Southern Africa (HEQMISA) enhanced the ability of higher education institutions in the SADC region to play a leading role in the development of the SADC countries. This has been done with specific activities to address the most pertinent and current development problems, while maintaining accountability to all stakeholders. Through this initiative, HEQMISA gathered specific sources of data (provided by participants of different higher education institutions and through commissioned case studies of the status of higher education in the SADC countries). This data, complemented by selected literature and policy documents of inter-country structures, formed the sources for the analysis of data mapping of the SADC higher education landscape.

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PART IV. Next Steps in Managing Teacher Migration

14. Beyond the Commonwealth Teacher Recruitment Protocol: Next steps in managing teacher migration in education in emergencies

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Abstract

Based on papers presented at the Sixth Commonwealth Research Symposium on Teacher Mobility, Recruitment and Migration in Addis Ababa in June 2011[1] and a review of the literature, this paper asks what the issues affecting forced migrant teachers are compared to voluntary migrant teachers, and what policies are necessary to ensure their welfare. Noting the research gaps around the role and status of refugee teachers in emergencies, it is found that teachers are significantly under-represented in the refugee population. By analysing the reasons why this is so and finding gaps in the existing policy environment and legislative framework, the paper attempts to determine the connections between the issues faced by refugee teachers, the protection of their rights and the contribution they are able to make towards increasing access to and quality of education. To exemplify how these issues play out on the ground, the paper describes a case study of Sudanese refugees in Uganda. Following a review of how the learning from the application of the Commonwealth Teacher Recruitment Protocol (2004) might be applied to efforts to improve institutional frameworks for the management of migrant teachers in emergencies, the paper concludes with recommendations for policy-makers aimed at protecting the professional role and status of teachers forced to migrate and enhancing their ability to operate constructively in emergency conditions.

Key words
Education in Emergencies, Teachers, Refugees, Forced Migrants, Migration, Institutions

14.1 Introduction

The Commonwealth Teacher Recruitment Protocol (CTRP) provides a framework for managing teacher migration in order to maximise mutual benefits to countries and minimise negative effects. However, recent studies have revealed the inadequacy of data about teacher migration for effective planning and policy-making. This is particularly true of education in difficult circumstances.

In response, the Commonwealth Secretariat and the UNESCO International Institute for Capacity Building in Africa (IICBA) jointly held the Sixth Commonwealth Research Symposium on Teacher Mobility, Recruitment and Migration in Addis Ababa in June 2011. The themes of the symposium were: the provision of high-quality inclusive

education in difficult circumstances, including the role and status of refugee teachers and the issues surrounding the forced migration of teachers. Two questions participants sought to address were: (i) what are the needs of forced migrant teachers compared to voluntary migrant teachers? and (ii) what policies are necessary to ensure the welfare of refugee teachers and to create an enabling environment for them to teach? Discussions aimed to answer how refugee teachers could best be managed so that their rights were protected, their impact on the destination country was beneficial and they were enabled to improve educational quality and access. Participants explored systemic and structural issues as well as good practice and identified future research directions. Ongoing quantitative and qualitative research was presented by field-based practitioners as well as educational managers and academics. Participants also examined the implementation of the CTRP and the relevance of its principles to education in emergencies. In addition to making recommendations to policy-makers developing strategies for managing teacher migration, the symposium provided more general lessons for the development of teacher recruitment protocols beyond that of the Commonwealth.

The present paper aims to summarise the relevant research presented at the symposium and the subsequent discussions, and to serve as a starting point for further debate on the issue of what happens to teachers 'the other side of the border' in an emergency. One of the principal outcomes of the symposium was the recognition of the dearth of research and indeed policy around the forced migration of teachers. This paper reviews the literature on the role and status of forced migrant teachers in education in emergencies, exploring some of the issues facing these teachers and the impact of them on educational service provision in emergency contexts. This is placed within the context of the institutional framework affecting migrant teachers. This is followed by a case study of Southern Sudanese refugees in Uganda. An analysis of the possible application of the principles of the CTRP in education in emergencies is then presented. The paper concludes with provisional policy recommendations and suggestions for future research.

14.2 Background

Access to education as a human right is confirmed by a number of declarations and conventions: the 1948 Universal Declaration of Human Rights; the 1949 fourth Geneva Convention and its Protocol I and II; the 1951 Convention Relating to the Status of Refugees; the 1989 Convention on the Rights of the Child; and the 1998 Rome Statute, which mandates protection for educational institutions. The 1990 Jomtien World Conference on Education for All (EFA) and the 2000 Dakar World Education Forum reaffirmed that the right to education persists even in situations of armed conflict. The Dakar Framework for Action particularly included a commitment to:

> meet the needs of education systems affected by conflict, natural calamities and instability and conduct educational programmes in ways that promote mutual understanding, peace and tolerance and that help to prevent violence and conflict (World Education Forum, 2000: 9).

Since the 1996 note by the UN Secretary-General on the impact of armed conflict on children, which drew attention to the prevalent loss of this human right during conflict (Machel, 1996), progress has been made in advocating for and implementing effective programmes for education in emergencies (Machel, 2000; UNICEF, 2009). Education in emergencies has increasingly become seen as the 'fourth pillar of humanitarian action' (Machel, 2001: 94) along with food, health and shelter and as a means of protection in itself (Nicolai and Triplehorn, 2003). However, recent reports highlight both the continued role and the changing nature of conflict in obstructing the achievement of the education Millennium Development Goals (MDGs) and EFA targets (UNICEF, 2009; UNESCO, 2011; World Bank, 2011).

Much of the literature surrounding education in emergencies focuses on the impact of armed conflict on children. Surprisingly little focuses explicitly on teachers and yet it is often stated that the most important factor for a good quality education is the teacher

(IIEP, 2006; NORAD, 2011). As a McKinsey report notes, 'The quality of an education system cannot exceed the quality of its teachers' (Barber and Mourshed, 2007: 13). Papers submitted for the Sixth Commonwealth Research Symposium on Teacher Mobility, Recruitment and Migration, held on 8–9 June 2011 in Addis Ababa, Ethiopia, suggested that there is very limited information on the role and status of teachers in emergencies, including teachers who are forced to migrate. Similarly, the Inter-Agency Network for Education in Emergencies (INEE) has noted in a review of literature on education in emergencies:

> Resource Experts felt that issues related to teachers were under-researched. Specifically, informants called for more studies into teacher development and training, teacher competencies, teacher retention, teaching for psychosocial wellbeing, the benefits of teacher training/capacity building, the morale and compensation of teachers, teacher certification in difficult environments, teacher management in emergencies and the identity of teachers (INEE, 2010*c*: 22).

The Commonwealth Secretariat has particular experience in teacher mobility, recruitment and migration, most notably in its development of the CTRP. This aims to balance the rights of teachers to migrate internationally against the need to protect the integrity of national education systems and prevent the exploitation of scarce human resources in developing or low-income countries (Commonwealth Secretariat, 2004).

The protocol does not specifically address the issues surrounding teachers who are forced to migrate. However, many Commonwealth countries are directly affected by teachers crossing borders to escape open conflict or structural violence, with some countries affected by insecurity themselves. Recent examples include Somali refugees in Kenya, Congolese refugees in Rwanda, Zimbabwean refugees in South Africa and Botswana, Sudanese refugees in Uganda and Afghan refugees in Pakistan, which hosts the single largest refugee population in the world, approaching two million (UNHCR, 2011*a*). Refugees can constitute a sizable proportion of a country's population – in the 1990s, refugees made up 10 per cent of the national population of Malawi – and a persistent one – refugees have comprised around half of the population of some northern provinces of Pakistan for over 20 years (Marfleet, 2006). Of course, refugees do not migrate only to neighbouring countries, but may seek sanctuary in any country. However, most refugee flow is from countries in the South to countries in the South, with developing countries hosting four-fifths of the world's refugees – arguably those with the least capacity, financially and institutionally, to manage such flows – and most refugees do move to their neighbouring country (UNHCR, 2011*a*).

The original request for the Commonwealth Secretariat to develop ethical codes of conduct in the recruitment of teachers came from small states in the Caribbean, such as Barbados, Guyana, Jamaica and Trinidad and Tobago, which were losing a large number of teachers through targeted recruitment. A subsequent consultation was then expanded to include other small states and poorer countries among the Commonwealth members.[2] Following the consultation, the protocol was developed, being adopted by Commonwealth Ministers in 2004. Its principles are applicable to any country which faces similar problems concerning the loss of scarce teaching forces as a result of international recruitment and therefore the CTRP has been recognised by UNESCO, the International Labour Organization (ILO), the Organization of American States (OAS), the African Union (AU) and Commonwealth Heads of Government as an example of international good practice in managing migration and development.[3] The AU has further acknowledged that the CTRP could provide useful insights to start a continental framework to help facilitate teacher mobility across Africa and it is currently exploring the development of a continental protocol for the AU Second Decade of Education for Africa (African Union, 2006*a*). The development of an African Teacher Recruitment Protocol seeks to promote the benefits of teacher mobility and cross-border teacher recruitment within regions and beyond in response to emerging needs and changes in the teacher labour market in Africa (African Union, 2011).

14.3 Definition of terms

As the scope of the target population and the issues that the CTRP covers are very large and general, this paper mainly discusses the research gap identified above, i.e. teachers forced to migrate due to conflict and the applicability of the principles of the CTRP and other existing instruments to them. We will first provide some definitions of the major terms used in the context of this paper to explain the scope of this study.

14.3.1 International migrants

When a person changes their country of usual residence, they are considered to be an *international migrant*. International migrants can be categorised according to the duration of stay. A *short-term international migrant* is generally 'a person who moves to a country other than that of his or her usual residence for a period of at least three months but less than a year', whereas a *long-term international migrant* is generally 'a person who moves to a country other than that of his or her usual residence for a period of at least a year, so that the country of destination effectively becomes his or her new country of usual residence' (THP Foundation and UNESCO, 2008: 12). This paper is also concerned with the issues which affect an *international migrant with irregular status*, who is defined as a 'person entering, traveling through or residing in a country without the necessary documents or permits' (THP Foundation and UNESCO, 2008: 14) due to emergencies.

14.3.2 Refugees

Article 1 of the UN Convention Relating to the Status of Refugees as amended by the 1967 protocol provides the definition of a *refugee* as:

> A person who owing to a well-founded fear of being persecuted for reasons of race, religion, nationality, membership of a particular social group or political opinion, is outside the country of his nationality and is unable or, owing to such fear, is unwilling to avail himself of the protection of that country; or who, not having a nationality and being outside the country of his former habitual residence as a result of such events, is unable or, owing to such fear, is unwilling to return to it (cited in Shacknove, 1985: 275).

The concept of the refugee is mutable and contested and is often dependent on the interests of the state (Marfleet, 2006). The term 'refugee' often implies forced migration, but the latter term is not legally grounded. 'Refugee' is also often used outside its specific legal context, for example in the term 'economic refugee', 'which emerged in the media to suggest that economic reasons for fleeing may be sometimes as compelling as political ones' (THP Foundation and UNESCO, 2008: 17), although they may not be an emergency or life-threatening. The argument to consider this case as that of a refugee rests on the fact that 'access to resources is denied on a discriminatory basis' (*ibid.* 17).

14.3.3 Forced and voluntary migration

Forced migration is defined as 'migration in which an element of coercion predominates' and it can be:

> conflict-induced, caused by persecution, torture or other human rights violations, poverty, natural or manmade disasters… Elements of choice and coercion can be overlapping but in the case of refugees and other displaced persons, compelling factors are decisive (THP Foundation and UNESCO, 2008: 29).

When the decision to leave a home country must be made urgently due to a life-threatening situation, it is fair to say that it is a forced decision, but even if the decision may take a longer time, as in the case of poverty, the decision can be either forced or voluntary.

In this paper, the term 'forced migrant teacher' is generally used to indicate a teacher migrating across a border to escape a life-threatening armed conflict, regardless of whether they have formal refugee status in accordance with the UNHCR Refugee Status

Determination (RSD) process. It is recognised that very similar issues to those described here will affect teachers fleeing any other sort of emergency, such as a natural disaster, or indeed any form of migration which is prompted by a teacher's inability to pursue a politically or economically sustainable lifestyle in their home country. In this paper, the term 'refugee teacher' assumes the teacher has been assigned refugee status through the RSD process. It is recognised that many forced migrant teachers may be waiting for their status determination, or may not have applied for it for a variety of reasons. Many of the issues presented in this paper will affect these teachers as much – or more – than those whose refugee status has been determined.

It would be wrong to assume that there are only 'forced' and 'voluntary' migrants, with a clear distinction between them. In reality, a teacher may elect to migrate in response to a long build-up of political repression, or a steady decline in their economic circumstances, either of which crosses a tipping point beyond which a teacher sees remaining as untenable. Lack of locally available jobs may spur a teacher to move abroad for employment. The reasons for migrating may be numerous for any one teacher, a complex interaction between 'push' and 'pull' factors, but in the end they may feel they have exhausted all other options.

Similarly, it is not only teachers who migrate involuntarily who are subject to vulnerability or insecurity in the destination community. Many of the above issues may affect voluntarily migrating teachers to a greater or lesser extent. Recruitment agencies, for example, may not always work for the best interests of migrant teachers. Host communities may be hostile; expectations, in terms of living accommodation, job profile, salary and status may not be met; culture shock and disorientation may occur; bureaucratic hurdles may prevent the recognition of qualifications; separation from family and home community may bring isolation and loneliness; and lack of familiarity with the legal context or dependency on a job for a visa may substantially reduce a migrant teacher's ability to negotiate, as well as their exit options. Teachers who migrate voluntarily may also be subject to absent or weak contracts, which are then not enforced; their physical security may be at risk due to lack of knowledge of their surroundings; and they may lack the privileges which local teachers enjoy. Both forced and voluntary migrants need to undergo a process of adaptation and both have the same end need: survival.

However, to consider the two extremes of the continuum, a teacher fleeing sudden onset conflict – or an earthquake – clearly has different needs to a teacher moving abroad in a considered and well-prepared effort to maximise their earning potential or to seek new horizons or professional development opportunities. Whilst remaining cognisant of the continuum of coercion that is the background to many migrants' – forced and unforced – decisions to leave their homes, there are differences in how the principles of the CTRP might be applied to those teachers escaping life-threatening conflict and those making a considered decision to move in order to maximise their utility, at which the CTRP is generally aimed. Perhaps the most striking difference is the lack of the formal and informal institutional frameworks that usually guide migration, such as information mechanisms, recruitment agencies, support offered by friends and relations, previously negotiated and agreed contracts, teacher organisations or a position within an official body; many refugee teachers will find themselves working for an NGO rather than a government, with a different working culture, remuneration and professional expectations. At the grassroots level, these insecurities and uncertainties are unlikely to result in motivated, committed teachers. Of course, experiences will vary across a wide spectrum and many refugee teachers may have had opportunity to prepare or may be quickly integrated into host communities. But, on the whole, the increased vulnerability of forced migrant teachers is an issue deserving of a robust policy response (Penson, 2011*a* and *b*).

14.3.4 Conflict-affected countries

There is no single accepted definition of a *conflict-affected country* and the definitions that do exist are often nebulous, contested and problematic (Bengtsson, 2011). While recognising that people may be forced to flee from any form of organised violence and that

the issues raised by flight are not necessarily connected to the reason for and type of violence, we use the definition used by the Education for All Global Monitoring Report 2011 (EFA GMR), as a country in which there is 'contested incompatibility over government and/or territory where the use of armed force is involved and where one of the parties to the conflict is the state'[4] (UNESCO, 2011: 138). The EFA GMR identifies a conflict-affected country as: 'any country with 1,000 or more battle-related deaths over 1999–2008' and 'any country with more than 200 battle-related deaths in any one year between 2006 and 2008' (UNESCO, 2011: 138). According to these criteria, there were 35 countries affected by conflict between 1999 and 2008. Of these, 17 were in sub-Saharan Africa. On average, sub-Saharan Africa had the largest number (20) of episodes of conflicts, although the average length of conflict was relatively short (9 years) compared to other regions, such as 45 years in Latin America and the Caribbean and 31 years in East Asia and the Pacific. It seems conflicts occur more frequently in low income (20 episodes) and low/middle income (23 episodes) countries than in upper/middle income (5 episodes) countries.

It is recognised that there are limitations in comparing conflict-affected countries with other countries in assessing educational indicators, due to the different characteristics of conflict, such as intensity, duration and geographic spread. There is no strong correlation between the level of teacher qualifications, economic wealth and conflict. For example, the Democratic Republic of the Congo is categorised as a conflict-affected country (which we assume may have disrupted the education investment), with low gross domestic product per capita (purchasing power parity) of US$319 (which arguably can affect spending on education), but it has a high rate of trained teachers at the primary education level (93 per cent). Angola, which has a high GDP per capita of US$5,812, has no data available on trained primary teachers. This indicates that there is a huge variation among the conflict-affected countries (see Table 14.1) and interventions must be designed according to context and need.

14.4 Situational analysis

Whilst forced migrant teachers may have migrated in order to escape insecurity, they may still live and work under emergency conditions. There is a continuum of fragility and vulnerability which the word 'emergency' tends to eclipse, by acting both as a cover-all and by being conceived as the point beyond which 'normality' has been replaced by an altered

Table 14.1 Trained teachers and GDP per capita (PPP) in conflict-affected countries in sub-Saharan Africa[5]

Country	Trained primary teachers 2009 (%)	GDP per capita (PPP) 2010 US$
Somalia	–	–
Central African Republic	–	757
Angola	–	5,812
Chad	*35*	1,300
Liberia	*40*	396
Nigeria	*51*	2,203
Guinea	*73*	1,048
Sierra Leone	*79*	808
Ethiopia	*85*	934
Uganda	*89*	1,217
Burundi	*91*	392
Eritrea	*92*	581
Democratic Republic of the Congo	*93*	319
Rwanda	*94*	1,136
Côte d'Ivoire	*100*	1,701

Source: UNESCO Institute for Statistics Data Center

state. In reality, host countries may suffer very similar conditions to source countries, and where the children taught are refugees too; they have the same needs as children in the emergency itself. As refugee camps – or other, more informal channels through which migrant teachers might find themselves teaching in refugee communities – often stand alongside formal state provision of education in host countries, rather than being integrated into the system, emergency conditions can be said to follow teachers into the host country, in the sense of the expectation of transience, a potential lack of security and uncertain status: all features of the emergency situation. So, while this paper differentiates between education *in* emergencies and teachers migrating *from* emergencies (concentrating on the latter), it recognises that situations are fluid and refugees may even continually cross borders back and forth as conditions and contingencies permit.

The number of refugees had been declining in recent years. However, political upheaval in North Africa and the increase in food insecurity in East Africa have contributed to a 15-year high in the number of refugees in the world, with over half of them children under 18 in need of education (UNHCR, 2011*a*) and the number displaced by conflict and environmental stress is expected to increase in the coming years (Marfleet, 2006; Clark, 2008; Gamlen, 2010; Thomas-Hope, 2011). It is generally acknowledged that conflict can significantly reduce the number of teachers available in the affected region, including refugee camps (IIEP, 2010*a*). Reasons for this include: schooling being regarded as political and teachers being targeted as a result; the absence of authorities, meaning education structures and systems can change rapidly, with salaries no longer being paid; infrastructure possibly being unsafe or insecure; and other opportunities in the economy opening for educated professionals.

The potential resource for refugee *receiving* countries which migrant teachers represent, however, seems to be ill-recognised, or at least recognised in markedly different ways. Countries can seem ill-prepared to cope with refugees or other migrants, resulting in reactive measures which may infringe the rights of people who move and consequently sub-optimal outcomes (Betts and Kaytaz, 2009). Even where one agency, such as an education ministry, within a country might welcome the influx of well-qualified and experienced teachers, the bureaucratic requirements of other agencies, such as ministries of immigration or labour, might make the efficient utilisation of teachers problematic, resulting in uncertainty and stress for the teachers and lost opportunities for the education system (Manik, 2011). Where population flows across a border create stresses on extant systems, it should be remembered that teachers are a potential benefit in alleviating some of those stresses. Whilst NGOs have a tradition of using the teacher pool as workers (Penson and Tomlinson, 2009), the degree to which official structures are set up to maximise the potential offered by refugee teachers varies (Betts in Chanda, 2010). Teachers do not disappear in an emergency, unless killed or wounded. They move, or drop their identity as a teacher. The question is, with such a net global shortage of trained education professionals,[6] how can the contribution to education these teachers make be protected, maintained and maximised?

Whilst it is known that teachers are under-represented in refugee camps (Sesnan, 2011), it is not always clear what happens to teachers once they have crossed borders, in terms of their professional and legal status, or their role in contributing to the provision of education to those affected by emergency. And while guidance exists for practitioners in emergencies for the recruitment and training of teachers, such as the UNESCO International Institute for Educational Planning (IIEP) *Guidebook for Planning Education in Emergencies and Reconstruction*, the INEE *Minimum Standards for Education: Preparedness, Response, Recovery)* (INEE, 2010*a*), and, on more general recruitment practice, in the *Sphere Humanitarian Charter and Minimum Standards in Humanitarian Response* (Sphere Project, 2011), policy advice for host governments dealing with an influx of teachers from insecure situations is harder to find. There is therefore a need to investigate the issues facing refugee teachers and to review the policy responses that would best maximise the protection of their interests and those of the education systems in which they find themselves.

14.5 Literature review and analysis

14.5.1 Emergencies

An emergency has been defined as 'a condition which arises suddenly and the capacity to cope is suddenly and unexpectedly overwhelmed by events' (Hernes, 2002: 2). Complex emergencies can include displacement of people across the borders of their country, forcing them to become refugees and/or displacement of people within their own country (Sinclair, 2001). Two broad categories are those caused by natural disasters and those caused by human agency such as war, conflict or genocide. These are frequently considered 'sudden onset' situations; although the latter category may have been building up for some time, the actual outbreak of violence may suddenly cross a threshold beyond which mass migrations may commence or it becomes impossible for authorities to continue to provide services. A third category has been proposed by Obura (2003), where the emergency might be more or less preventable and/or predictable. She includes crop failure and famine because they may be cyclical or sometimes early warning systems may give notice. In all three categories, planning and preparation are key to successful responses (Buckland, 2005). This does not only apply to humanitarian agencies, but also to governments – which might be subject either to the emergency itself, or to an emergency in the region – so that policy and legislative frameworks are in place that proactively facilitate the provision of public services, or at least do not inhibit their provision.

Education was not traditionally perceived as a life-saving activity in emergency situations. This meant it was not considered as part of the immediate humanitarian response to an emergency in the same manner as food, water, sanitation, shelter and health (Sommers, 2005*a*). In addition to the trauma and disruption to their studies caused by the conflict, then, children could be left for several months without any structured activities. Since the Machel Report in 1996, however, a strong consensus has emerged that education should be considered a crucial element in emergencies because 'it can help children, adolescents and the entire community to regain a sense of normality, address psychosocial needs and convey life-saving messages' (UNHCR, 2007: 16). Maintaining education is more than just business continuity. It can speed the transition of recovery.

A state is legally required to provide only basic education (Nicolai, 2003), although the Convention on the Rights of the Child stipulates that the provision of early development and care is also an obligation placed on states (IIEP, 2006). In times of emergency, where there is greater competition for scarcer resources, the provision of early years, secondary, tertiary and vocational education becomes a low priority. This is due partly to financial constraints (basic education is usually the cheapest form of education) and partly for structural reasons: secondary-age children may not have been to or completed primary school; secondary and tertiary teaching requires more highly-qualified teachers, who may be in short supply; and there is likely to be greater variation among students at secondary level, making curriculum planning and delivery more difficult (Buckland, 2005). Both these factors are influenced by policy: the pursuit of the MDGs, which focus on universal primary education, may have contributed to a sectoral imbalance in resource allocation that is compounded by the emergency.

During conflict itself, intense insecurity can make school attendance unsafe (UNESCO UIS, 2011). Even when education is provided, this may be offered only to certain age groups, or some children may not be able to attend due to economic or familial duties, often influenced by cultural practices, especially related to gender. And while NGO-driven education provision may augment or replace state provision to some extent, capacity, resources or opportunity to provide a comprehensive education system are rarely available (Nicolai, 2003).

As conflict pushes people away to seek refuge either within their own state or across a border, stresses are placed on the provision of education where the migrants settle. In no country is the education system designed with sufficient headroom to be able to cope with a sudden influx of large numbers of students. There will be insufficient education infrastructure, books, teachers and resources; ethnic or other social or political tensions

may migrate together with the refugees or arise between the migrants and the host community; countries will not suddenly be able to source and distribute extra funding. In addition to these material, social and economic issues, the legal status of the refugees may be unclear, not least to them. The 'emergency', then, is not only in that area or state directly affected by conflict, but frequently also in the territories in which refugees seek sanctuary. Institutions[7] for determining the status of forced migrants may be as compromised by large influxes as education systems, adding to the uncertainty for teachers:

> Despite the legal framework, which is both clear and objective, asylum systems set up to protect and safeguard the rights of refugees, procedures are often fraught with compromises necessitated by lack of resources and overburdened systems (UNHCR, undated: 1).

Thus, for example, while UNHCR's Education Strategy advocates that refugee *recipients* of education be integrated into national education systems, there is no corresponding push for refugee *deliverers* of education to be similarly integrated (UNHCR, 2012).

14.5.2 Education in emergencies

The term 'education in emergencies' refers to formal and non-formal education in situations where children lack access to their national and community educational system due to complex emergencies or natural disasters (Winthrop, 2006; WCRWC, 2007). Since conflicts can be of very long duration and may be chronic in nature, the term 'education in emergencies' refers:

> not only to initial non-formal education programs, but also to the establishment of formal education programs during the conflict, as well as the eventual re-establishment of community and governmental educational structures in a post-conflict environment (Triplehorn, 2001: 3).

Most practice falls into either short-term 'emergency' provision, which tends to be reactive, quick and focused on physical provision, or long-term 'developmental' provision, which tends to be proactive, delayed and focused on capacity building (Baxter and Bethke, 2009). Policy-makers, however, tend to agree that integrating developmental aspects into emergency provision from the very start, while being difficult, is nonetheless necessary to ensure long-term success (Pigozzi, 1999; Nicolai, 2003). This is further complicated by the difficulty of distinguishing in practice between immediate post-emergency provision and longer-term forms of provision for long-term displacement situations and the difficulty of drawing any distinction between the two when the future is unknown. Two school feeding programmes, for example, may look identical in practice, but have very different purposes; in an emergency situation, school feeding may be used simply to ensure children are adequately nourished, while in a more developmental situation, it may be used to encourage higher rates of access to education. How, where and why the 'goal-shift' takes place may not be clear (Penson and Tomlinson, 2009). This again points to the usefulness of clear policies to provide reference points for managing education during and after the emergency.

Additional factors are the curriculum and language of instruction in refugee and internally displaced person (IDP) environments. In short-term emergencies, with the expectation of a quick return to the area of origin, using the origin country systems, curricula, language and certification structure provides continuity and prepares students to fit back in with the system when they return. In longer-term emergencies, students might be expected to assimilate into the host community on leaving school and so should undertake host country courses of study in the host country language, leading to host country certification (IIEP, 2006). The difficulty is of course that an emergency's timescale is usually unknowable. The tension this represents gets greater the further one progresses through the school system and students become more inextricably linked in with one system or the other. This increases the difficulties surrounding providing anything but basic education

and hence leads to the erosion of will to provide post-primary education through the formal system.

The fact that most refugees move to a neighbouring country may have advantages, as cultural similarities may make host communities more receptive and the experience for migrants consequently less disturbing. But governments tend to see migration as a containment issue, as it involves the violation of a national border and hence they take steps to regulate what can be viewed as an aberrant situation (Marfleet, 2006). To take one current example, that of asylum seekers from Côte d'Ivoire in Ghana, 'No asylum seekers are attending local schools,' meaning that the school in the refugee camp housing the asylum seekers, Camp Fetama, will have to re-open (UNHCR, 2011*c*: 4).

Education can be used as a tool with which to manipulate refugee and displaced persons. Host governments or authorities and donors may tire of supporting refugees and IDPs for long periods of time. Local integration of the displaced population may be resented and resisted for political, cultural or economic reasons and may fluctuate dramatically over time. Governments and donors may restrict access to education cycles, such as pre-school, secondary or tertiary education, or even cut off funding to whole refugee or IDP school systems, in order to incite populations to repatriate or return home. We should not lose sight of the potential for education to contribute not towards peace and reconciliation, but towards distrust and violence (Davies, 2004). And education facilities themselves may be occupied by military forces, adding further pressure to already over-burdened infrastructure and creating an intimidating atmosphere not conducive to increasing access and learning (Human Rights Watch, 2011).

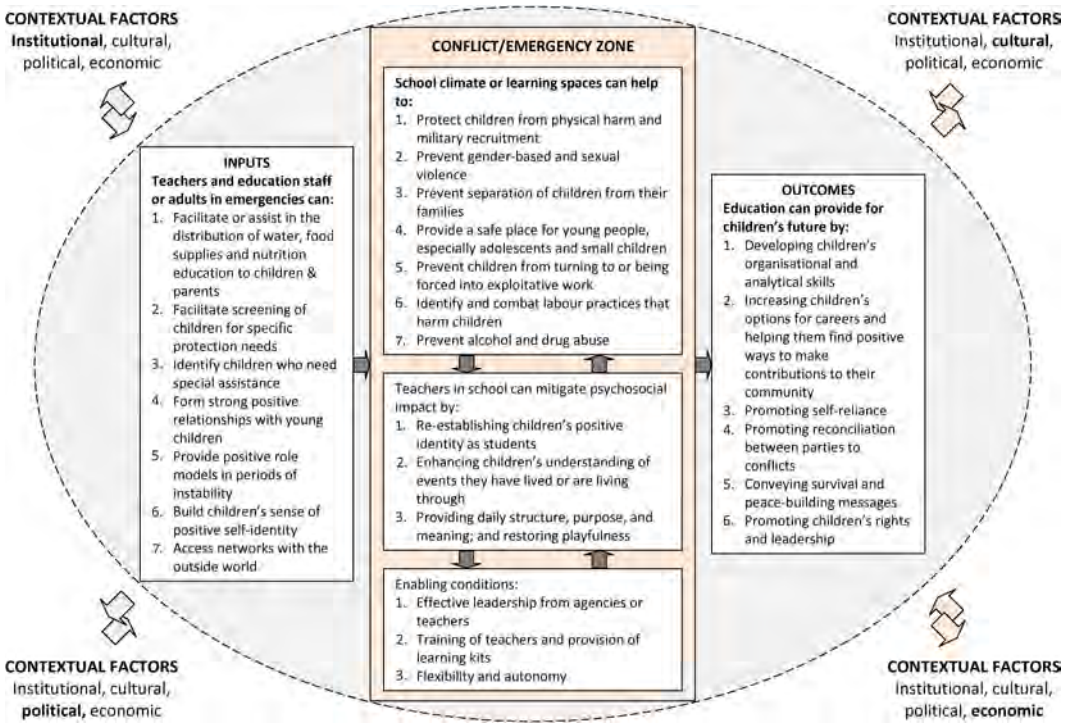
Other external factors are relevant. In particular, continual, systemic issues of poor co-ordination in emergencies condition the environment in which alternative education programmes arise (Sommers, 2004; McNamara, 2006). Indeed, education continues not to enjoy the same status as other aspects of humanitarian initiatives and is frequently sidelined in emergency planning and implementation, despite an apparent consensus among international agencies, governments and actors that close co-ordination is desirable. As Sommers (2004) argues, co-ordination by national governments is often difficult, due to a lack of governmental power, control over resources, capacity and an aid industry that can seem designed to prolong dependence in order to ensure its own continuation (Harrell-Bond, 1986). Additionally, the majority of funds are channelled to non-governmental actors. UN agencies frequently have overlapping mandates and hence ill-defined roles on the ground. NGOs have a tendency to resist national government control, as they see their sector as politically independent, yet they are influenced by donor priorities. Donors traditionally see education as a 'development', not a 'humanitarian', concern and hence remain somewhat reluctant to prioritise emergency education (Brannelly, Ndaruhutse and Rigaud, 2009).

However, the formation of a global education cluster by the Inter-Agency Standing Committee and recent refocusing of many donors' resources on conflict-afflicted countries is changing this. Lexow states that:

> Funding to education in humanitarian assistance has increased tremendously if one looks at natural disasters and conflicts combined. But it is less certain that the same increase has happened in conflict ridden areas. Figures from the country case studies show that the gap between requirements and actual contributions is huge (in Rose and Greely, 2006: 39).

A number of authors have noted that the breakdown in formal institutions during a conflict can provide an opportunity, during both emergency and post-emergency provision, to work towards an improved education system – not so much to reconstruct as to reform (Buckland, 2005; Nicolai, 2009). This of course is generally targeted at the conflict-affected country from which refugees are emanating, but nonetheless, providing education in emergencies is often seen as an opportunity to improve the delivery of education, even in host countries. Frequently this seems to be pedagogically focused – an opportunity to move from 'traditional' teacher-centred methodologies to 'modern' child-centred

Figure 14.1 A conceptual framework of education's influence on children and young adults in emergencies (after Triplehorn, 2001)



methodologies, such as that exemplified by UNICEF's 'child-friendly schools' or the International Rescue Committee's (IRC) 'healing classrooms' (Kirk and Winthrop, 2007).

What emerges is that there is now a strong body of evidence demonstrating the value of education in emergencies and the convergence of actors supporting it – at least in principle – and that an emergency can present an opportunity for change. Triplehorn (2001: 6) laid out a persuasive case for this value. Using his list of the potential benefits of education in emergencies as a starting point, a conceptual framework for understanding education in emergencies can be devised (see Figure 14.1). This paper concerns itself mainly with the institutional contextual factors (while recognising that there is strong inter-relatedness between these and the other contextual factors).

14.5.3 The role of teachers in education in emergencies

As Figure 14.1 shows, teachers are among the most important resources in education in emergencies and reconstruction (Buckland, 2005). Without teachers, there can be no schooling, and teachers can help bring communities together and re-establish community bonds (Rose and Greely, 2006). Conversely, teacher recruitment and placement can directly and indirectly affect fragility and quality:

> Teacher recruitment and placement can create or exacerbate tensions if not performed in a non-discriminatory, participatory and transparent manner. Policies that ensure teacher retention are essential to assure that teacher training and professional development programs positively impact on long-term education quality (INEE, 2011: 5).

Teachers can also be important drivers of change, supporting recovery from emergencies and promoting human rights, peace and security (Bush and Saltarelli, 2000; Smith and Vaux, 2003). This need not be in the conflict-affected country; the conditions for change can be nurtured in refugee communities before being transplanted on the refugees' return. Rose and Greely note that:

> An entire generation was educated in refugee camps in Guinea before being repatriated to Liberia... This included teacher training... Trained teachers were an

> important cadre of people in supporting the transition post-conflict, as they helped to kick-start the education system in conflict-affected areas... Given the important role teachers play, the need for attention to teacher training is recognised even during emergency situations... A key challenge in the transition towards post-conflict is that teacher qualifications from one country may not be recognised when refugees are repatriated. In recognition of this, UNHCR and IRC have been supporting initiatives by helping to negotiate the recognition of teacher qualifications with the Liberian Ministry of Education (2006: 10).

With an eye to the future reconstruction scenario, Shepler (2010) argues, in a study in post-conflict Liberia and Sierra Leone of returnees trained when refugees in Guinea, that it may be better to focus on trained teachers who are able and willing to work rather than train new teachers. These might be teachers already working in schools, especially in rural areas, who could be supported through in-service training and continuing distance education programmes.

Efforts to facilitate mobility and protect migrant workers' rights have been made by some leading international organisations. Some have become legally binding conventions and others are voluntary codes of practice. Box 14.1 shows selected examples of existing instruments facilitating mobility. Also relevant is the joint ILO/UNESCO *Recommendation Concerning the Status of Teachers*, which 'sets forth the rights and responsibilities of teachers and international standards for their initial preparation and further education, recruitment, employment, teaching and learning conditions' (ILO/UNESCO, 2008: 3).

Box 14.1 Examples of existing instruments to facilitate mobility

UNESCO Conventions on Academic Recognition (Arusha Convention) (1981)[8]

Promotes (1) greater mobility of students and professionals throughout the African continent; (2) effective use of resources through improving academic mobility of students and teachers; and (3) better recognition of academic and professional qualifications, stages of study and experiential learning.

ILO Multilateral Framework on Labour Migration (2006)[9]

A set of non-binding principles, guidelines and best practices for governments, organisations of employers and workers to pursue a rights-based approach to labour migration. The framework aims to foster co-operation in order to assist in the implementation of effective policies on labour migration.

ILO Equality of Treatment (Social Security) Convention (1962, No 118)[10] and Maintenance of Social Security Rights Convention (1982, No 157)[11]

Guarantees equality of treatment with nationals of destination countries and portability of benefits if they return to their countries of origin.

Commonwealth Teacher Recruitment Protocol (2004)[12]

Offers an international standard for teacher recruitment in the 54 Commonwealth member states. It aims to balance the rights of teachers to migrate internationally, on a temporary or permanent basis, against the need to protect the integrity of national education systems and prevent the exploitation of scarce human resources in developing or low-income countries.

WHO Global Code of Practice on the International Recruitment of Health Personnel (2010)[13]

Aims: to (1) establish and promote voluntary principles and practices for the ethical international recruitment of health personnel, taking into account the rights, obligations and expectations of source countries, destination countries and migrant health personnel; (2) serve as a reference for Member States in establishing or improving the legal and institutional framework required for the international

recruitment of health personnel; (3) provide guidance that may be used where appropriate in the formulation and implementation of bilateral agreements and other international legal instruments; and (4) facilitate and promote international discussion and advance co-operation on matters related to the ethical international recruitment of health personnel as part of strengthening health systems, with a particular focus on the situation of developing countries.

Commonwealth Code of Practice for the International Recruitment of Health Workers (2003)[14]

The code is intended to provide Commonwealth governments with a framework within which international recruitment of health workers should take place, so as to allow workers the right to migrate knowing their interests will be protected and recruiting countries to source employees from other countries in order to meet the demands of their healthcare systems, without unduly negatively affecting source countries' systems.

Philippine Overseas Employment Administration (POEA) (1982 and 1987)[15]

The legal mandate of POEA is to: (1) promote and develop the overseas employment programme and protect the rights of migrant workers (1982); and (2) regulate private sector participation in recruitment and overseas placement, maintain a registry of skills and secure best terms of employment for overseas Filipino workers.

Tuning Educational Structures in Europe (2000)[16]

Promotes comparability of study programmes across institutions and national borders along subject areas. It is a process and an approach to (re-) designing, developing, implementing, evaluating and enhancing quality first (bachelor), second (master) and third (doctoral) cycle degree programmes. The project covers about 30 subject areas, including education, medicine and civil engineering.

Novelli (2009) similarly shows how internally displaced teachers in Colombia were able to bring about improved conditions of service for themselves as a result of the opportunities for change opened up by the reordering of social and political institutions during and after a conflict. And Triplehorn notes:

> education programs in emergencies protect the national educational investments by keeping teachers and educational administrators from leaving the education profession during times of crisis and by sustaining parent-teacher associations, teachers' unions and other educational bodies (2001: 5).

However, as Burde (2004; 2005) notes, the status of the affected population – whether they are refugees, internally displaced, or 'stayee' civilians caught in a conflict – has a powerful influence on these outcomes. She further notes that:

> International organizations that replace the state (albeit partially) during a complex emergency by providing social services, or by assisting communities to do so, should not abandon government ministries during social reconstruction (2004: 84).

14.5.4 The status of teachers in education in emergencies

We know then that, in an emergency, teachers are important. And we know that encouraging the formal frameworks for education is important too. However, we also know that:

> In emergencies, qualified teachers are often unavailable, unready, or themselves suffering from the physical and psychological effects of the crisis. Often, additional teachers need to be rapidly recruited among community members present at the emergency site (UNICEF, 2005: 230).

Despite the prevalent view that 'camp teachers should be recruited from among the displaced population' (NRC/CMP, 2008: 549), 'in situations of emergency or post-conflict, there is often a shortage of trained and/or experienced teachers' (IIEP, 2010*a*: Ch. 5.1: 2). The Norwegian Refugee Council (NRC) goes on to note that 'Together with the education provider and the local authorities from the host government, it should also be assessed whether teachers from outside the camp can be integrated in the camp education system' (NRC/CMP, 2008: 548).

It is understandable that host countries are unlikely to have considerable numbers of teachers ready to be deployed into refugee camps, given the obvious enormous political, financial and logistical challenges that would entail. It is presumably fair to assume that, all else being equal, the proportion of teachers in a displaced population should be similar to the proportion pre-displacement.[17] The question raised, then, is what happens to the 'missing' teachers – and how can their skills and experience be put to good educational use?

Sesnan confirms that in refugee communities, teachers are under-represented – by which is meant not just low teacher-pupil ratios, but lower teacher-pupil ratios compared to premigration populations. Referring to the makeshift schools that arose in camps housing refugees, he notes:

> The big problem was that – with rare exceptions – they didn't have any teachers. I observed this first-hand in Northern Uganda, in Khartoum, in rural Sudan and, looking at the experiences in other places, I saw that it was often the same in other countries. Mozambican refugees in Malawi in the Eighties and Nineties had a very small number of teachers among them (2011: 2).

Sesnan attributes this to the fact that 'When they could, teachers fled or gravitated towards their salaries' (2011: 4). While this might be the official salary, it might also be the opportunity to earn through private tuition. Sesnan also addresses the question of the portability of a teacher's qualification:

> There are not many cases in Africa where the formal qualification is an issue if a refugee with at least secondary education wishes to teach in a camp. It will depend normally on how strict the NGO chosen as UNHCR's partner is. It becomes an issue if they continue on beyond the camp and wish to teach in the schools of the host country (2011: 4).

Little is known about the teachers who are not in the refugee camps, as noted by Rose:

> Many refugees do not live in camps, but in informal settlements in urban areas. These refugees often lack the official papers that would allow them access to education and other basic services. In many contexts, they are also denied the right to work... Very little is known about those refugees who are living in urban areas or displaced internally; they are likely to be more numerous than refugees living in camps (2011: 186).

Another possible contributory factor for the lack of teachers is that 'relief agencies "cream off" the best qualified refugees and provide them with "escape" scholarships to other countries' (Pennells and Ezeomah, 2000: 179) – or indeed jobs in the agencies.

14.5.5 The institutional framework

It appears that there are few studies which focus particularly on how professional, legal and other formal institutional frameworks in host countries encourage or inhibit refugee teachers from teaching, or what effect this may have on education in the classroom or the wider management of education in an emergency. Rather than working within a clear national policy environment that has the buy-in of government, organisations working in education in emergencies are forced to revert to other frameworks. For example, UNHCR says of its operations in Pakistan; 'In the absence of national legislation on refugees, UNHCR will continue refugee status determination (RSD) in accordance with its mandate' (UNHCR, 2011*b*).

The unpredictable nature of emergencies and uncertainties as to how long they may last mean that governments may radically alter policies, where they have them. Rutinwa charts the movement in Tanzanian refugee policy in response to changing circumstances and government positions. He states that the 'Refugees (Control) Act [1965] was introduced not to provide refugees with rights but to control them and perhaps to discourage others from taking refuge in Tanzania' (1996: 292). The act was passed in response primarily to a steady influx of refugees from ongoing violence in Rwanda. It included allowance for refugees to be deported and their property to be requisitioned or confiscated without compensation (Peter, in Rutinwa, 1996). Notwithstanding the act, Rutinwa states that in actuality, Tanzania maintained an 'open door' policy with regard to refugees, welcoming them and accommodating them. This applied even to the large numbers of Rwandan refugees entering Tanzania as the conflict in Rwanda, which began in October 1990 and culminated in the 1994 genocide, intensified. However, in response to a surge in refugees from Burundi in 1995, the Tanzanian Government adopted a 'no more refugees' policy. Rutinwa gives the reasons for this as:

> the pressure exerted by the sheer magnitude of the refugee problem, the impact of refugees on Tanzania, security concerns, the economic crisis in the country, shrinking international support and the failure of the open door policy in ending refugee crises (1996: 296).

Rutinwa notes that the 'no more refugees' policy was likely to have a significant detrimental impact on refugees. As well as the direct impact of the policy is the lack of policy stability, which further undermines refugees' personal and professional status by creating unpredictable institutional frameworks. The adoption of long-term policies based on international frameworks would help to alleviate these insecurities.

Within these macro-level policy frameworks and the uncertainties surrounding them and the general situation, education managers must take difficult decisions: should students study host country or source country curricula? Can students' learning certificates (and teachers' qualifications) be recognised whether they return home or stay? With regard to qualifications, the question of the cross-border validity of learning certificates for *students* has now been covered in some depth in the literature and policy recommendations made, most relevantly in the IIEP publication *Certification Counts* (Kirk, 2009). However, cross-border portability of *teachers*' qualifications is not included in that study (although it notes that similar issues apply). Similarly, although field guides and minimum standards for education in emergencies address the question of curriculum and whether the host country or source country curriculum should be followed for students, there are no agreed international standards for teacher training curriculum content, or on related professional standards.

The Commonwealth Secretariat has, with the South African Qualification Authority, developed useful tools on the recognition of teacher qualifications and professional registration status across Commonwealth member states (Morrow and Keevy, 2006; Keevy and Jansen, 2010). However, these do not cover non-Commonwealth countries (as noted above, there are currently a number of Commonwealth countries sheltering refugees from non-Commonwealth countries); nor do they take into account the special circumstances of education in emergencies, where teachers may arrive without their certificates, having left home precipitously. And, as Baxter and Bethke (2009) note, authorities often do not recognise teaching certificates given by NGOs or other non-formal providers. For example, at the time of writing the Côte d'Ivoire MoE would not automatically recruit trained refugee volunteer teachers into its workforce, so it had indicated its wish to avoid direct involvement in the training process of teachers recruited to teach Ivorian children in Liberia's camps.[18] There is a strong argument for a framework for professional standards that would cover both formal and extra-formal teacher training and ease the recognition of teacher qualifications. This should be competency-based.

Given the difficulties in comparing qualifications, in trying to make meaningful and fair comparisons and in keeping comparison tables up to date (Gravelle, 2011) – and in accessing such information on the ground in an emergency – the value of qualification

comparability frameworks is arguably higher as a tool for managing formal recruitment and mobility and voluntary migration than for emergencies. That does not mean, however, that they should be discounted. As most refugees move to a neighbouring country, there is a high level of predictability in the qualifications refugee teachers are likely to have. Planning for the possibility of an emergency could, therefore, realistically include neighbours comparing qualifications and agreeing concordances.

In some countries, a number of tools have been developed to help assimilate refugee teachers in the formal job market. In the UK, for example, the Refugee Assessment and Guidance Unit at London Metropolitan University produced an overview identifying a considerable number of programmes in the UK designed to help refugee teachers join the UK teaching profession (RAGU, 2007). One such example is a one-year programme offered by the Institute of Education at the University of London called Pathway into Teaching for Refugee Teachers, offered free to refugees, to support their entry into the formal teaching system in the UK.[19] Similarly, the Refugees into Teaching partnership, between the UK Training and Development Agency for Schools and the UK Refugee Council, offers guidance on assimilating refugee teachers into schools (Refugees into Teaching, 2007).

Although there are well-established systems of formal and informal institutions for incorporating refugee teachers in countries like the UK, these may not be clearly linked to teacher supply, demand and deployment policies. Ochs and Jackson, in a review of the implementation of the CTRP, found that 'a challenge… was a lack of in-country data tracking systems to report on the numbers of recruited and/or foreign trained teachers in any given country' (Ochs and Jackson, 2009*b*: 4). It is even less clear how this could be accomplished in developing countries dealing with a sudden large influx of refugees. Göttelmann-Duret and Tournier found 'irrationality' in the general management of teachers in many countries, resulting in inefficient deployment and utilisation:

> One can hardly expect that teachers are deployed in a rational and equitable way if the official norms and regulations guiding this process are non existent, inadequate, incoherent or hardly ever enforced (2008: 7).

The findings that sometimes teacher management systems are deficient and that legal frameworks for supporting education incomplete, are supported by Mulkeen, who, in synthesising eight studies of sub-Saharan African countries, found that 'Systems for management of supply were often weak' and 'Teacher deployment presented challenges in all of the case-study countries' (2010: 2). It should be noted, however, that both this and the Göttelmann-Duret and Tournier study address the formal, state system and do not address education in emergencies, which is often left to non-state actors to provide. Kirk and Winthrop note that 'In emergency, chronic crisis and early reconstruction contexts, very little attention is given to the make-up of the teaching corps' (2005: 19). Given that there are 'porous borders' between the established formal system and the provision of education in emergencies, there does seem to be a significant research gap looking at the interchange of teachers between the two systems. Such research could support advocacy efforts attempting to encourage governments to prepare for emergencies:

> There is a dire need to convince national authorities to prioritize preparedness or conflict mitigation efforts. Frustratingly, unless there has been a natural disaster or conflict in recent history, there is often little sense of urgency among many of those working at a ministerial level on the impact of conflict and natural disaster on education (IIEP, 2010*b*: 22).

Mulkeen does note that 'Most of the case-study countries had some system for providing emergency initial [in-service] training and qualifications to unqualified teachers' (2010: 174). This refers to the emergency of significant teacher shortfalls in the entire national system, not necessarily as a result of a conflict-induced emergency. There is in fact a wide and growing body of literature about the training of teachers in emergencies and many agencies delivering education in emergencies have teacher training programmes.

Indeed, training is often presented as an intervention necessary because of teacher shortages:

> The importance of teachers in children's lives dramatically increases in situations affected by armed conflict: children may have lost or been separated from their parents, and parents may be less able, for many reasons, to support their children. Support for teachers' professional development is even more important as acute teacher shortages often mean that adults and youth who have never taught before or even finished their own education are recruited as teachers (Kirk and Winthrop, 2005: 18).

Other strategies for tackling teacher shortages have been suggested, such as the use of open and distance learning (Thomas, 1996), but there remains a strong preference for initial training. Training new teachers, however, as a response to teacher shortfalls in the emergency, does not address the question of where the already qualified teachers are.

14.5.6 Why teachers leave: exiting the institutions

Sesnan (2011) noted that teachers tend to follow their salaries, often moving to urban areas rather than remain in refugee settlements. Baxter and Bethke (2009) similarly report that teachers tend to prefer government schools, because they receive a salary from the government. They add that in some countries, teachers with a recognised qualification are automatically eligible to go on the payroll, putting pressure on the country's budget. Citizenship issues notwithstanding, this might provide an incentive for governments not to recognise refugee teachers' qualifications. With regard to teachers employed by non-governmental bodies, Penson and Tomlinson (2009) noted the disruptive effect of the wide range of remuneration paid to teachers during the emergency in Timor-Leste by different agencies, with some being paid nothing and others receiving relatively high allowances, making it difficult to deploy teachers efficiently.

The question of compensation of teachers in emergencies is beginning to be addressed. Both the IIEP *Guidebook for Planning Education in Emergencies and Reconstruction* and the INEE *Guidance Notes on Teacher Compensation in Fragile States, Situations of Displacement and Post-crisis Recovery* contain advice on compensating teachers (INEE, 2009). However, on the ground, it appears that much needs to be done to rationalise and co-ordinate incentives and ensure that they are paid consistently (INEE, 2010*b*). As the Joint ILO/UNESCO Committee of Experts on the Application of the Recommendations concerning Teaching Personnel (CEART) puts it: 'Compensation in the form of monetary and non monetary rewards for teachers in fragile states, emergency or displacement situations and in post-crisis recovery periods is inadequate or non-existent' (CEART, 2009: 23). Baxter and Bethke (2009) call for both a minimum living wage for teachers and for greater harmonisation in teacher incentives. Both would contribute to a more stable institutional framework encouraging teachers to remain in the teaching profession.

The 1951 United Nations Convention Relating to the Status of Refugees and the 1967 Protocol Relating to the Status of Refugees provide a clear international framework on refugees' rights. The 1948 Universal Declaration of Human Rights enshrines the right to work. Edwards notes:

> Among the economic rights protected under the Refugee Convention, Part III regulates 'gainful employment'. With respect to wage-earning employment, Article 17 requires States to accord to refugees 'lawfully staying in' their territory the most favourable treatment accorded to non-nationals in the same circumstances (2006: 6).

Manik, however, found that refugee teachers from Zimbabwe seeking employment in the formal education sector in South Africa encountered a number of bureaucratic and other hurdles preventing them from easily taking up employment. Some of these were raised by formal institutions, such as permit application procedures that were perceived by migrants to be inconsistent, time-consuming and onerous, and school management policies that precluded promotion prospects or long-term contracts to migrant workers. One of Manik's research participants noted that it took them 'a year and a half from the time of my

application to actually taking up the job' (2011: 7); while others noted that, because they were on temporary contracts, they were paid significantly less than nationals on a permanent contract and suffered from job insecurity. Other obstructions were more informal, such as language barriers and xenophobia in host communities. The combination of these factors led migrants to feel financially, professionally and socially insecure.

Betts similarly notes:

> an absence of formal opportunities for teachers in destination countries. In many sub-Saharan African states, legislation focuses either on asylum and refugee protection or on channels for voluntary economic migration. Rarely is clear thought given for how forced migrant populations can be brought into the labour market (Betts in Chanda, 2010: 29).

Betts and Kaytaz identify the phenomenon of 'survival migration' in reference to the 'Zimbabwean Exodus': those 'fleeing an existential threat to which they have no domestic remedy (2009: 1). Their studies 'demonstrate the arbitrary and inconsistent nature of the response and the lack of guidance provided by the existing international institutional framework' (*ibid.* 3). Although Betts and Kaytaz's study is written of a context in which migration is not primarily a response to conflict, there are still lessons to be learnt. Migrants moving from Zimbabwe to Botswana face a stringent regulatory environment that may discourage them from applying for refugee status, but instead provide an incentive to enter the informal economy:

> asylum seekers are required to remain in detention during their RSD process. If they receive recognition, they are entitled to live in the refugee camp but can apply for a work permit if and when they find work. There is very little additional legal provision that relates to the situation of the Zimbabweans (*ibid.* 18).

Dissuaded from pursuing formal paths, 'the majority bypasses the asylum system entirely and either cross the border illegally or use temporary visitors permits issued at the border' (*ibid.* 19). They are then dispersed around the country and, as they are undocumented, their vulnerability increases. This phenomenon has two main consequences: 'First, scarce skills remain untapped, curtailing a positive impact of the flow. Second, exploitative employment practices thrive, creating a negative effect of migration on jobseekers in the host country' (Kiwanuka and Monson, 2009: 51).

Although South African institutions value the quality of Zimbabwean teachers and seek them to fill gaps in the supply of teachers in South Africa,[20] according to Betts and Kaytaz the South African regulatory framework similarly presents obstacles to efficiently accommodating Zimbabwean survival migrants in formal systems. Whereas in Botswana, 'there is an absence of free movement and the right to work for asylum seekers' (Betts and Kaytaz, 2009: 18), 'South Africa has an unofficial "no camps" policy (a "self-settlement" policy)' (*ibid.* 14). Notwithstanding this:

> Despite low recognition rates, many Zimbabweans apply for asylum in order to get the 'asylum seeker permit' granted under Section 22 of the Refugee Act, which confers asylum seekers the right to work and freedom of movement until an RSD decision (*ibid.* 10).

But in their attempts to work legally in South Africa, 'migrants face many bureaucratic challenges' (*ibid.* 10). Betts and Kaytaz thus find, like Manik, that the institutional framework for processing migrants does not necessarily lead to optimal outcomes. Experienced, well-qualified teachers and head teachers end up in menial jobs, not using their professional skills (Sibanda, 2010).

Although, as noted, Betts and Kaytaz's research does not focus on refugees from conflict or on teachers specifically, as Betts notes:

> From an institutional point of view, what matters is not the cause of movement but the rights that are unavailable in the country of origin and consequently need to be offered through substitute protection (in Chanda, 2010: 28).

Betts has, however, noted that there are skilled, qualified teachers in survival migrant populations and that these teachers often end up working in the informal sector in less than ideal conditions. In view of this, he states:

> Survival migration may represent an alternative and neglected source of supply for teacher recruitment. There is a need to go beyond the false dichotomy of voluntary/forced migration, and to recognise that forced migration can offer a valuable pool of qualified labour (in Chanda, 2010: 29).

Thus, 'the Zimbabwean situation demonstrates how serious the human consequences of this unpredictability can be in a mass exodus situation. A clear division of institutional responsibility is required' (Betts and Kaytaz, 2009: 26). Furthermore, there are 'hard law norms – in terms of International Human Rights Law – but what is needed is a "soft law" consolidation of those norms to highlight their implications for survival migration' (in Chanda, 2010: 28).

The Zimbabwean experience is not unique. The 2011 EFA GMR provides further examples:

> Under Malaysian law, refugees are not distinguished from undocumented migrants. In Thailand, a long-standing refugee population from Myanmar has no entitlement to state education. More generally, restrictions on refugee employment reinforce poverty, which in turn dampens prospects for education. And difficulty obtaining refugee status leads many to go underground (UNESCO, 2011: 16).

Ochs (2011) found that there was a lack of effective collaboration between relevant ministries within receiving countries. Ministries of education and ministries of foreign affairs often did not co-ordinate their registration processes for migrant teachers, even in non-emergency environments, yet establishing a co-ordinated and consistent plan of action would increase efficiency. The role of institutions is clear: 'Stringent eligibility requirements, inconsistent application of rules and restrictive laws result in many refugees being undocumented, in some cases because they are forced underground' (UNESCO, 2011: 152).

Sinclair (2001) makes a number of recommendations to enhance educational responses in an emergency. Among these are improving organisations' preparedness, strengthening institutional policies and inter-agency co-operation. The majority of these recommendations are intended for non-governmental or inter-governmental organisations. Sinclair's recommendations could, however, be held equally to apply to governments, especially where the emergency education is being provided in a refugee camp outside the conflict state. IIEP's *Guidance Notes for Educational Planners* on integrating conflict and disaster risk reduction into education sector planning observe 'the need to institutionalize conflict and disaster risk reduction in national systems' (IIEP, 2011: 23). With regard to refugee provision, however, Williams notes:

> Infrequent mention is made in the literature on refugee education of the relationship between the refugee system in the camps and the local education system in the host country. Quite often refugee camp education is a kind of enclave run by agencies which are outside the country's curriculum, regulations and administrative set-up (2006: 25).

Goldberg and Jansveld do provide an example of where government and NGOs worked together in Guinea to address the needs of Sierra Leonean refugees, taking local contexts into account:

> UNHCR and IRC met with the Guinean Ministry of Education. As a result of this initiative, they avoided establishing two parallel educational systems: one serving refugees and their host communities and one the general Guinean population (2006: 31).

Collaboration and consultation on establishing roles and responsibilities not only results in a clearer institutional environment, is also eases the process of transition of education sub-systems from NGO management to government:

> It is imperative, therefore, that the state and its educational authority, on all levels, be involved as early as possible in educational interventions. This includes developing cooperative agreements, inclusion of authorities in planning and implementation and capacity building (*ibid.* 33).

However, Goldberg and Jansveld do note that 'working with government can be difficult' (*ibid.* 45).

14.5.7 The effect on education quality, access and inclusion

Without an institutional framework that enables qualified, experienced teachers to practise their craft, there can be a significant detrimental impact on education quality, access and inclusion. In their study of Burmese refugees living in camps in Thailand, Oh and van der Stouwe draw attention to an institutional framework which does not seem to result in either the protection of the rights of the refugees, or an environment enabling them to fulfil their potential:

> Officially, refugees do not have access to services provided outside the camps, nor are they permitted to leave the camps to earn an income. International nongovernmental organizations (NGOs) provide most basic and capacity-building services in the areas of food, shelter, health, education and community services. Despite these contributions and the good intentions of the NGOs, the protracted refugee situation and the restrictions on refugee movement have created a deadlock situation in which it is extremely difficult for the refugees to control the development of their own society (2008: 590).

Oh and van de Stouwe make explicit the link between the institutional arrangements for managing refugees and the impact on the quality and inclusiveness of education. The inability to earn resulting from the Thai regulations keeps incomes low and continues the refugees' dependence on NGOs. In turn, the limitations placed on teachers, together with the less than optimal management of teachers in particular and the education system in general, contribute towards the continuation of entrenched patterns of exclusion of certain groups and poor uptake of the opportunity to increase the quality of the education system. Oh and van der Stouwe relate this institutional situation to the Education for All framework 'which mandates that a government is responsible for guaranteeing access to quality education for all learners residing in its country' (*ibid.* 593). The difficulties presented by the camp arrangements mean that many teachers exit the education system. In addition to the inevitable effect on quality of a class's teacher changing and the negative impact on the children's sense of normalcy from seeing their teacher, with whom they may have built up a relationship of trust, depart, the high turnover of staff simply continues the problem of needing to recruit more teachers. Furthermore:

> the constant resettlement of teachers and other camp residents imposes even more pressure on teachers. In both mainstream schools and special education centers, faculty and staff members need to be recruited and trained continuously because of high turnover (*ibid.* 605).

The selection of replacement teachers in an emergency can affect inclusion and quality in other ways. In refugee contexts, pre-existent community divisions may well be replicated or even strengthened and, unless handled extremely carefully, the selection of teachers from certain groups may well further entrench those divisions in the classroom: 'community involvement in the selection of teachers can, inadvertently, give rise to patronage and lower quality than might have resulted from a more independent process' (Sullivan-Owomoyela and Brannelly, 2009: 37). Having said that, they note 'selecting teachers from the local community who are known and accepted by the community, is as important as providing teachers with the right training' (*ibid.* 140).

It must be remembered that the difficulties teachers face in negotiating the system are in addition to the disturbance to their world caused by their displacement. This disturbance may well reduce teachers' ability to adapt to their new environment through the loss of resilience, having being compelled to abandon their resources in all their forms. These resources:

> may be of an individual or collective nature and include material possessions; access to land, housing and employment; kin and communal relationships; and familiar language, traditions and institutions – the whole complex of economic, political, socio-cultural and psychological elements that make up the framework for existence of each and every human being (Marfleet, 2006: 194).

Ezati, Ssempala and Ssenkuru (2011), in their research into the effects of experiences of conflict on learning outcomes in Northern Uganda, find a link between teachers' traumatic experiences, their motivation and performance in the classroom and students' learning. As they put it, the past continues to affect teaching and learning in the classroom in the present. Oh (2012) notes that the disruption of the connection between education and nation-state building seen in refuge contexts has an impact on the sense of identity of refugee actors, raising questions about the purpose of education. By extension, the existential role of the teacher is brought into question. Just as psychosocial activities aimed at re-establishing normalcy and building children's resilience are a key focus of many education in emergency interventions (Penson and Tomlinson, 2009), so too should be measures which re-establish a predictable personal and professional normalcy for teachers. Providing an institutional framework for regularising their legal status and clarifying their employment rights which is clear, predictable, consistent, accessible, rules-based, fair and – most importantly – in the interests of the teacher – would go a long way to achieving this.

The lack of teachers not only affects quality and inclusion, but also limits the opportunities for reform opened by the emergency. Demirdjian notes that efforts to introduce human rights and citizenship education have been made in schools for Palestinian refugees in Lebanon. However, 'the lack of trained teachers limits the possibilities of teaching these concepts in a professional and well-planned manner' (2012: 117).

In their study on Eritrean refugees in Ethiopia, Kirk and Winthrop (2007) also found, like Oh and van de Stouwe, that experienced teachers tended to exit the system, or else 'migrate up' from primary to secondary teaching positions due to the higher remuneration and status afforded by the latter. 'Spontaneous teachers' were thus employed to replace the qualified teachers, but the researchers found that these recruits were 'tentative' about teaching, having not previously had a plan to be a teacher. This lack of confidence affected quality, especially at primary level.

Kirk and Winthrop suggest training the new teachers as a solution and, like Goldberg and Jansveld, think it important that this be linked to the wider institutional environment through pathways to teacher certification from formal teacher training institutes. In earlier work on Ethiopia and Afghanistan, Kirk and Winthrop drew attention to the link between teachers and access to education and the connection with recognition of qualifications:

> In areas with acute teacher shortages, teachers who have not completed established certification processes but who possess 'alternative qualifications' should be formally recognised. This is especially important for promoting access to education in early reconstruction contexts such as Afghanistan (2005: 21).

This brings us to the heart of the issues raised by this literature review. In the aftermath of an emergency, particularly an emergency grounded in conflict, there tends to be a dearth of qualified, experienced teachers available to contribute towards education provision. This is at least partially attributable, in many instances, to the prevailing institutional or regulatory framework. The response to this situation is typically not to provide incentives for the teachers to return to teaching, by addressing the institutional issues, but to train replacement teachers from among the remaining refugee population. However, 'teacher training alone will not necessary improve education systems especially in fragile contexts in which for various reasons teachers may leave the profession faster that they can be trained'

(INEE, 2011: 5). This paper agrees and further argues that there is a strong case for further research into the causes of teachers exiting teaching, the relationship between this and the institutional environment, where teachers go to and what they end up doing and the ways in which they can be persuaded back to the profession (or not to leave in the first place).

The following section, based on the experience of a practitioner in the field, will use a case study of Southern Sudanese refugees to exemplify some of the above issues.

14.6 Case study: refugees from South Sudan

The recent birth of South Sudan is an opportunity to look at some of the factors involved in the creation of a new teaching force for a new country in the most complex of circumstances. South Sudan inherits its territory from the old Sudan, but the history of education for the South Sudanese is far more complex than would be expected, in consequence of various historical, practical, social and 'emotional' factors. The recent history – that is, of the second civil war (1983 to 2005) – involved:

(a) IDPs: resulting from the displacement of probably two million people within the old Sudan, both to the cities of the north, usually in vast displacement camps on the desert periphery, categorised as 'illegal' by the state authorities;

(b) refugees: resulting from flight into exile of another two million to neighbouring countries, sometimes for as long as twenty years; and

(c) stayees: those who stayed behind willingly or unwillingly. They were found on both sides of the civil war: within rebel-held territory and in the towns held by and run from the north.

The civil war was one of the few recent wars where education and language[21] were a major issue. After the first combats which led people to flee rebels[22] and government alike, young people fled Sudan partly to escape the old education system which was aimed at imposing a unified Arabic medium curriculum which was strongly slanted to Islamicising the largely Christian southerners.

It is important in the South Sudanese context to distinguish 'those who teach' from 'qualified teachers'. Throughout the recent history, in all parts of South Sudan (except the garrison towns) the majority of those who taught were not formally qualified and had generally received a series of temporary short courses, inconsistently given and overlapping, with no central record-keeping, filling up a file but never amounting to a formal training which could be offered for a qualification.[23] Emergency and relief teacher training were always necessities (Sesnan, 2010).

The following briefly covers the situation of teachers in the various scenarios described.

14.6.1 Displacement within Sudan[24]

There was some displacement within the south, though those near the border preferred to go into exile. In many rural areas village schools remained intact. Often, the majority of their teachers had moved to the state capital or large cities (e.g. Juba or Wau) where there was some security and salaries were being paid. Eventually a substantial number of schools were displaced to or replicated themselves in the towns.

There was a great need for schools in Khartoum and other northern towns; the few teachers who were qualified in the national system could find jobs and others, usually higher secondary students or leavers (Grades 10–12) volunteered to teach in the massive displaced camps supported mainly by the Catholic diocese (Sesnan, Sebit and Wani, 1989) and the Sudan Open Learning Unit (SOLU) who provided a modular self-help methodology course. Those who did not live in camps attended evening primary classes, no matter what their age, usually packed into church compounds. It was here that SOLU, supported by funds from Oxfam America, created the first 'schools in a box', set up specifically to be packed away when the bulldozers came to clear the 'illegal' teaching sites.

14.6.2 South Sudanese as refugees

When the South Sudanese left for neighbouring countries, they did not have many teachers with them (with the curious exception of Dungu in what was then Zaire, where a whole teachers' college had fled) (Sesnan, 1993).

In Uganda and Kenya, which had the greatest concentration of refugees, there were eventually quite complex and efficient training programmes. In Uganda, they were run for many years by the Jesuit Refugee Service (JRS) and the Education Programme for Sudanese Refugees (EPSR, now Echo Bravo). The Ugandan syllabus was used with no objection from any quarter, since Ugandan qualifications had always been accepted in Sudan. There was from the beginning an emphasis on getting teachers trained in the Ugandan systems.

There was intense debate, involving UNHCR, Uganda's government, (both local and national) and the refugees themselves, about the use of untrained teachers. This debate occurs frequently in such situations where, as in the case of Darfur's refugees in Chad, it is the small salary (allowance) that is focused on, not the education of the children. The refugees tend to declare that host country teachers, however qualified they may be, do not know how to teach them. The host country in return refuses access to their exams unless the children have been taught by trained teachers. The NGOs stick to a policy of 'letting the refugees choose their teachers', even when they are patently not qualified to make such choices.

Eventually, as part of the refugee-affected area approach, not only did Ugandan teachers come to take some of the teacher training posts, but enough Sudanese had been trained in Uganda. By then the schools themselves were beginning to have mixed pupil populations as well, serving both Sudanese and Ugandan children.

By linking teachers to Uganda's own Northern Integrated Teacher Education Project distance upgrading programme (with a centre in the camps) and the JRS policy of sending 30 girls a year to train as primary teachers in the Uganda system, together with EPSR's policy of sponsoring students to finish secondary school, the result was a good education system which has now developed nine full secondary schools in the camps and for some years now the children have been graduating from Uganda's universities.

When this population began its half-hearted return (basically each family adopting a one-foot-in-each-country approach) they continued to use the Ugandan system. However, as the South Sudan Government consolidates itself, interesting new twists appear. For instance, in a much-needed effort to upgrade teachers (most of whom had not been in Uganda, of course) they gave two-year residential training courses to two teachers from each primary school. This was a great setback to many schools as these teachers continued to receive their salaries when in training and were not replaced by anyone in the school.[25]

14.6.3 South Sudan's stayees – government areas

It is often only at the moment of the refugees' return that it is realised that the part of the population which had stayed (or fled into the bush) had often suffered much more than those who got away. They had missed out on the refugee opportunities accrued over many years of exile. In Juba in 2005, with the signing of the Comprehensive Peace Agreement and the gradual takeover of the town by the Sudan People's Liberation Army, the Juba people saw themselves as heroes for having lived through 20 years of hell. Those who came back from the diaspora or from refugee camps were seen as people who had 'enjoyed' – according to Juba people – exile. On the other hand, there were returnees who believed the Juba people should be grateful for being liberated (and sometimes should give up their posts and jobs to the incoming people).

Indeed, the people coming back from 15 years in refugee camps in Uganda were taller, healthier and much better educated than those who had stayed at home. Those who had stayed at home though, had, because the Khartoum Government paid them, better salaries and better housing and felt threatened by the new arrivals.

At the time of writing, South Sudan is consolidating all these different elements. Initial tensions have diminished and – at least in the beginning – salaries are being paid. It remains to be seen, though, whether the good things that were learned in exile, say in Uganda, about management and organisation will survive the transition. An initial study in an area to which refugees who had grown up under the JRS system in Uganda had returned was not optimistic on this. The government offices seemed to have retained many of their poor habits (such as instant transfers of teachers with no respect for continuity) and teachers who had been pupils in the system in Uganda not seeming to have absorbed all of what had made their education good.

14.7 The principles of the Commonwealth Teacher Recruitment Protocol and emergencies

Adopted by Commonwealth member states in 2004, the main aim of the Commonwealth Teacher Recruitment Protocol (CTRP), as stated in paragraph 2.3.1, is:

> to… balance the rights of teachers to migrate internationally, on a temporary or permanent basis, against the need to protect the integrity of national education systems and to prevent the exploitation of scarce human resources of poor countries.

Outlined in the CTRP document are the rights and responsibilities of the stakeholders: recruiting countries, source countries and the recruited teacher. The document addresses the role of recruiting agencies as well as the monitoring, evaluation and future actions required of member countries and of the Commonwealth Secretariat. Since its adoption, the CTRP has been acknowledged and its implementation actively supported by international organisations including the ILO, UNESCO, OAS and Education International as a document of best practice in both education and migration policy discussions. A summary table is provided (see Table 14.2). As previously mentioned, the document does not specifically address the issues surrounding teachers who are forced to migrate. Yet, the principles within the document apply to a variety of circumstances – including recruitment, forced migration, or voluntary migration – that affect Commonwealth nations and teachers. Although the document refers to 'recruiting countries', the term 'receiving countries' would arguably be more appropriate in the context of emergencies.

In 2008, the Commonwealth Secretariat commissioned a review of the implementation of the Commonwealth Teacher Recruitment Protocol (Ochs and Jackson, 2009*a*), which sought to assess and review: (a) the quality, content and impact of initiatives, policies, programmes, practices and procedures that countries (specifically ministries of education) have developed and implemented as a requirement of the adoption of the CTRP; (b) the effectiveness of organisations and institutions, such as international and civil society organisations and teachers' organisations in advancing the implementation of the CTRP; and (c) the extent and effectiveness of the Commonwealth Secretariat in implementing the future actions of the protocol and in conducting advocacy for CTRP implementation. Key findings from the review, which are relevant to education in emergencies and teacher migration from emergencies, were as follows:

- *Context is central to the implementation of the protocol*, with macro-issues determining migration flows as well as demand and influencing teachers' individual choices to migrate.
- *Data on teacher movement are not being captured by ministries of education.* A subsequent recommendation, agreed by the Meeting of the Commonwealth Working Group on Teacher Recruitment, suggested that 'emphasis should be placed on strengthening existing data management systems and monitoring data and information at regional/international and country level to address issues relating to tracking teacher turnover, recruitment, deployment and relevant information about each foreign recruited teacher' (Ochs and Jackson, 2009*a*: xi).

Table 14.2 Rights and responsibilities outlined in the CTRP

RECRUITING COUNTRIES	
RIGHTS	**RESPONSIBILITIES**
- To recruit teachers from wherever	- 'Manage domestic teacher supply and demand in a manner that limits the need to resort to organised recruitment in order to meet the normal demand for teachers' (p.9, [Para 3.1]) - 'Agree on mutually acceptable measures [with source countries] to mitigate any harmful impact of such recruitment' (p.9, [Para 3.2]) - 'Give consideration to forms of assistance such as technical support for institutional strengthening, specific programmes for recruited teachers, and capacity building to increase the output of trained teachers in source countries' (p.9, [Para 3.2]) - 'Make every effort to ensure that departure of recruited teachers is avoided during the course of the academic year of the source country' (p.9, [Para 3.3]) - 'Provide to a source country, all relevant information regarding the status of teachers recruited' (p.10, [Para 3.4]) - 'Make every effort to obtain a clearance certificate from a source country prior to any contract of employment being signed' (p.10, [Para 3.5]) - 'Ensure the establishment of a complaints mechanism and procedure in regard to recruitment to be known to the teacher at the start of the process' (p.10, [Para 3.6]) - 'Maintain a quality assurance system to ensure adherence' to the protocol and fair labour practice by recruiting agencies. 'Where agencies do not adhere, they should be removed from the list of approved agencies' (p.11 [Para 3.7]) - Inform recruiting agencies of their 'obligation to contact the intended source country in advance, and notify it of the agency's intentions' (p.11, [Para 3.8]) - Reach prior agreement 'between the recruitment agency and the government of the source country, regarding means of recruitment, numbers and adherence to the labour laws of the source country' (p.12, [Para 3.9]) - 'Recruitment should be free from unfair discrimination and from any dishonest or misleading information, especially in regard to gender exploitation' (p.12, [Para 3.9]) - 'Provide detailed programmes to enable [recruited] teachers to achieve fully qualified status in accordance with any domestic requirements of the recruiting agency' (p.12, [Para 3.10]) - 'Ensure that the newly recruited teachers are provided with adequate orientation and induction programmes, including cultural adjustment programmes, with a focus on the school and its environment' (p.13, Para [3.14])
SOURCE COUNTRIES	
RIGHTS	**RESPONSIBILITIES**
- 'To be informed of any organised recruitment of its teachers by or on behalf of other countries. If a country decides to refuse any organised recruitment, the recruiting country should be informed of such a decision' (p.15, [Para 4.2])	- 'Manage teacher supply and demand within the country, and in the context of organised recruitment' (p.14, [Para 4.1]) - 'Should have effective strategies to improve the attractiveness of teaching as a profession' (p.14, [Para 4.1]) - 'Ensure the recruitment and retention of qualified teachers in areas of strategic importance' (p.14, [Para 4.1]) - 'Establish policy frameworks which set out clear guidelines as to categories of teachers whose recruitment they will not support' (p.14, [Para 4.1]) - 'Shall endeavour to respond to requests for approval to recruit within 30 days' (p.15, [Para 4.3]) - 'Include within its terms and conditions of service for teachers, if not already in place, provisions that relate to release of teachers under international exchange and organised teacher recruitment arrangements, and to their re-integration into the source-country education system on their return from abroad' (p.15, [Para 4.4])

Table 14.2 Rights and responsibilities outlined in the CTRP (continued)

RECRUITED TEACHERS	
RIGHTS	**RESPONSIBILITIES**
- 'Employment conditions not less than those of nationals of similar status and occupying similar positions' (p.12, [Para 3.10]) - 'Bound and subject to rules of national labour law and is also governed by any legislation or administrative rules relating to permission to work and suitability to work with children in the recruiting country' (p.12, [Para 3.11]) - 'Should be employed by a school or educational authority. Only schools and education authorities should obtain work permits to enable the employment of recruited teachers' (p.12, [Para 3.13]) - 'Transparency and full information regarding the contract of appointment' (p.16, [Para 5.1])	- 'Show transparency in all dealings with their current and prospective employers' (p.16 [Para 5.2]) - 'Give adequate notice of resignation or requests for leave' (p.16 [Para 5.2]) - 'Inform themselves regarding all terms and conditions of current and future contracts of employment and to comply with these' (p.16 [Para 5.2])

- *Implementation of the protocol extended well beyond the work of governments and organisations identified as stakeholders in policy documents.* Understanding the system of teacher migration offers lessons for applying the principles of the protocol to education in emergencies and teacher migration from emergencies (see Table 14.2) (Ochs, 2011).

A state of conflict and/or natural disaster in either a sending and/or a receiving country affects teacher migration patterns. Evidence also suggested new trends in recruitment patterns. Following the South Asian tsunami in 2004, migrant teachers working in the Maldives returned to their homes. In recent years, areas of South Africa have become destinations for Zimbabwean teachers who chose to leave their home country in search of other opportunities. Yet, a placement for the teachers is not a guarantee upon arrival. Thus, the implementation of the principles of the CTRP needs to take into account the spectrum of emergency – which might be related to conflict or a natural disaster – that would influence the teacher's plans with respect to duration of stay.

While the causes of migration may be different, there are similarities in the principles underlying the management of migration, because the purpose of migration management instruments is essentially the same. The following section seeks to outline some of the issues affecting the implementation of the CTRP and apply the learning to the emergency context.

14.7.1 Key issues affecting implementation

Key issues affecting the implementation of the CTRP arguably relevant to emergency education are: changing teacher migration patterns; national social and security policy; migration legislation and global financial conditions. Ochs (2003; 2007; 2008) and Ochs and Jackson (2009*a*) found – looking at the spectrum of research conducted on teacher migration since 2000 – that there have been distinct changes in migration patterns to and from individual Commonwealth countries. While the global education market has affected some migration patterns, such as a more recent trend for Commonwealth teachers to take up positions in the Middle East to take advantage of comparatively tax-free, high salaries. The impact of the global financial crisis on international exchange rates and the devaluation of currencies in developing market economies have been widely reported. Teachers reported getting 'stuck' working abroad and unable to return home due to a downturn in their financial situation, despite negative changes in their life circumstances, suggesting cases of personal, economic emergency situations. The fluctuations of exchange rates affect remittances, even in those countries where remittances have become part of

the cultural heritage and a welcomed source of foreign exchange. As a result, an emerging outcome of financial change is a greater awareness of the interconnectedness of the local and global economies, as well as a widespread acknowledgement of the dangers of unregulated industries.

14.7.2 Key successes

Key successes in applying the CTRP include Barbados, which demonstrated a robust policy response and innovative co-operations. Although the case of Barbados does not reflect migration driven by emergency, it provides lessons in terms of strategies for collaboration and co-ordination.

Prior to the adoption of the protocol in 2004, Barbados experienced significant recruitment demand for its teachers and subsequent migration to the Cayman Islands and Bermuda. This interfered greatly with the organisation of the education system and often required replacing recruited teachers with untrained teaching professionals. In the Ochs and Jackson study (2009*a*), the ministry reported that it had not disseminated the protocol to the teachers, but did believe that teacher unions were important to this process. In an interview, the Barbadian Union of Teachers (BUT) confirmed that a pocket version of the Commonwealth Teacher Recruitment Protocol was disseminated to union members. In addressing the issues faced by Barbadian teachers working within the US, the union worked with the American Federation of Teachers to secure healthcare coverage and to address visa issues and work placements. The position of the Barbadian Secondary Teachers Union (BSTU) was to ensure that those who had taken up positions abroad had not been employed on contracts less favourable than those already working within the Barbados education system. In the context of the United States, the BSTU sought to enlist the support of both major national teacher unions, the National Education Association (NEA) and the American Federation of Teachers (AFT).

Barbados has also been attempting to build collaboration with recruiting countries (Ochs and Jackson, 2009*a*). Efforts are underway between Barbados and a United States school district located in the state of Kentucky, which was led by a Barbadian working in the school district. The recruitment programme was designed to help Barbadian teachers improve their standard of education to meet the highly qualified status requirements for teachers in the United States. It provides an example of a creative solution whereby teachers trained elsewhere could achieve the qualification required in their new destination. With respect to education in emergencies, it is notable that most refugees move to a neighbouring country, which means predictability in the qualifications refugee teachers are likely to have. Planning for the possibility of an emergency could, therefore, realistically include neighbours comparing qualifications and agreeing concordances to facilitate smooth transitions.

Barbados has managed to control the worst negative impacts of teacher migration by identifying the factors contributing to the departure of teachers, analysing the effect on domestic supply and demand and developing robust policy responses based on a balance of the needs of the education system and the rights of teachers. By providing information about the CTRP to teachers, Barbados has managed to increase awareness of the issues surrounding migration. An increasingly resilient education system has emerged (Rudder, 2011). The creation of a strong policy framework which balances protection of education systems with protection of teachers' rights – to the benefit of both entities – would seem to be a useful lesson to be learned.

14.7.3 Challenges to implementing the principles of the CTRP

With respect to education policy, it is important to distinguish between teacher supply – the absolute number of teachers in a region – and teacher deployment – the location where the teachers are working. Although a country might have target teacher supply numbers, the teachers must also be deployed where they are needed, which includes remote or unattractive areas. As mentioned previously, training new teachers is a response

to teacher shortfalls in the emergency and does not address the question of where the already qualified teachers are.

Varying security policies also affect teacher migration. Without communication between the ministry of education, immigration and border control, important background information on teachers can be overlooked. In recent years, the international media has reported on cases of teachers with criminal records, including known paedophiles, seeking and achieving employment outside their home countries. These examples point toward the need for different government (and non-government) departments to work together on managing teacher migration: it is not just an issue for the ministry of education.

14.7.4 Learning from the CTRP

The CTRP has been useful in promoting the concept that managing migration can be helpful to both source and destination countries. Muvunyi (2011) noted how the Government of Rwanda had used the CTRP as a basis for negotiations with the Government of Kenya to manage the temporary migration of Kenyan teachers to work in the Rwandan education system, resulting in mutual benefit to the countries and the protection of the migrant teachers. He noted the strong co-ordination and co-operation between the various stakeholders in Rwanda in managing teacher recruitment, including the Ministries of Education, Finance and Economic Planning, Local Government, and Foreign Affairs and Co-operation; the Teaching Service Commission; Rwandan High Commissions; partners; support institutions; and teacher education institutes. He stressed the importance of systems and structures, with each actor having clearly assigned roles and responsibilities and the importance of legal frameworks, such as bilateral agreements, between countries. Underlying this is a view that sees the benefit migrants bring, which, it is argued, is true of forced as well as voluntary migrants. Advocacy needs to be undertaken to persuade destination governments to implement creative solutions. For example, in countries that struggle to staff rural schools, survival migrants might be approached to work in these positions.

Enforcing a voluntary agreement can be difficult, as accountability mechanisms lack bite: as Miller, Mulvaney and Ochs note, 'The Protocol does not hold any legal authority' (2007: 158). The cases of Rwanda and Barbados demonstrate the importance of institutionalising the principles of migration management through policy and legislation. Gathering data on the implementation of the CTRP has similarly been difficult (Ochs and Jackson, 2009*b*). Even where reliable mechanisms for gathering data on teacher stock and flow exist, they rarely capture the nationality of teachers or whether the reason a teacher has left the teaching service is to work abroad. Improvements to education information management systems would assist teacher supply and demand planning and should include refugee teachers. Accurate teacher registration systems that responsibly included refugee teachers would help planners in an emergency to deploy teachers effectively.

Another barrier to the smooth implementation of the CTRP is the differing bureaucratic requirements of countries regarding minimum qualifications to teach – and the dynamic nature of this, where changes to minimum standards may make the previously recognised qualifications of a teacher suddenly unrecognised. Moving towards harmonisation of standards would assist the migration process for both forced and unforced migrants.

Both voluntary and forced migration tends to be temporary, although the duration of the former can be anticipated more accurately than the latter and better included in teacher supply models. However, while voluntary migration is increasingly temporary in nature, as the globally mobile labour force expands (Hugo, 2011), the number of refugees in protracted situations (greater than five years) was at its highest in 2010 since 2001, at 7.2 million (UNHCR, 2011*a*). In planning education in emergencies, the expected transitory nature of the camp population should be taken into account and resettlement of refugees out of the camps planned for.

There are clear differences between the context the CTRP was designed to address and the situation in a conflict-related emergency. At the policy level, there can sometimes be

little for the principles of the CTRP to 'latch on to', as it were: the CTRP assumes a certain minimum institutional framework – functioning source and destination governments, the presence of recruitment agencies, a degree of volition and access to information on the part of the teacher and so on. It is nonetheless the case that there is much that can be learned from the implementation of the CTRP as a tool to manage teacher migration effectively. Policy preparedness, as demonstrated by the case of Barbados, is clearly key. However, preparation for an emergency does not seem to figure highly in many governments' policies at the moment. 'As a result of this lack of political attention, the budget for emergency planning is often neglected and funds are not earmarked for these activities' (IIEP, 2010*b*: 22). Further, 'The vagaries of annual budgeting compound the problems of education financing during emergencies. This is especially true in situations of long-term displacement' (UNESCO, 2011: 19), where budgeting for long-term refugee needs is made difficult by changing political and donor priorities. There remains much advocacy work to be done to increase the understanding of forced migrants' needs in an emergency and of developing proactive institutional frameworks for managing them in the event of an emergency. Development partners could assist in providing the resources necessary to put the plans, policies, systems, structures and technical management capacity in place. They could also assist in monitoring implementation, to ensure accountability.

In many senses, NGOs and other non-state actors delivering education in emergencies have a similar function to recruitment agencies. Work on the implementation of the CTRP has shown that, because recruitment agencies are existentially and financially dependent on maximising their profits, they may sometimes behave less than ethically, having insufficient regard for the effect of recruiting teachers on the source country or the rights of the teachers (Ochs and Jackson, 2009). Large-scale emergency recruitment of teachers in an emergency by non-state actors might lead unintentionally to similar effects on the host country systems, if salaries and terms and conditions are sufficiently attractive. Non-state stakeholders need to be mindful of the wider effect of recruitment drives. Again, an institutional framework would be helpful in balancing the needs of agencies and the formal education system.

The CTRP was in part developed to protect the rights of teachers who migrate. Problems they face might include inadequate or non-existent contracts; finding on arrival that their job has significantly less status or remuneration than that promised; poor accommodation; discrimination or job insecurity (Reid, 2006). As refugee status is often difficult to gain and as recipient governments may be keen not to be seen to encourage further flows of migrants into their territory, ensuring forced migrants' rights may similarly be difficult. For example, recognising migrants' qualifications and allowing them to work might be seen by host governments as adding a pull factor to the existing socio-economic-political-environmental push factors underlying forced migration, thereby potentially increasing the number of migrants which they are already struggling to accommodate. Another example would be that allowing teachers to work in the host country could drive down the market value of a national teacher if the country already has a surplus of teachers, driving more teachers into poverty (although this might also increase the quality of teaching overall as authorities could be more selective). Where the migrant teacher works outside of the state system in an informal school serving the needs of the migrant community, allowing them to work might be seen to encourage the loss of students from the formal sector to the informal. Yet another example is that some teachers in camps, especially those who are qualified, may be resettled in the second or a third country, which could have a deleterious effect on teacher-pupil ratios and teaching quality in the camp schools. This may be particularly true where teachers are offered up-skilling programmes by NGOs while in camps, which enable them to secure employment outside their communities. Internationally agreed instruments that provide a framework to manage migration could assist with these difficulties by enhancing systemic stability and predictability, the establishment of minimum expectations in accommodating the needs of forced migrant teachers and the exchange of good practice.

The CTRP was also designed to help protect vulnerable countries' education systems from teacher 'poaching' without recompense. Clearly, conflict-affected countries are vulnerable

and it is important not to encourage teachers away from struggling education systems unless they feel there is no choice. When there is a balance between protecting the rights of a teacher and the needs of an education system, a framework of sound institutions is again helpful.

The African Union Commission, supported by IICBA, is currently developing an instrument to assist the management of teacher migration in Africa (African Union, 2011). Participants at the Sixth Commonwealth Research Symposium felt that this protocol could present a valuable opportunity to contribute towards setting in place policy frameworks which anticipate migration in emergencies, making management of forced migrants more responsive and more effective. They felt it could also help to provide greater international consistency in the ways that forced migrants are managed in AU Member States. Clearly the lessons learned from the implementation of the CTRP will be important.

14.7.5 Future actions

Forced migrant teachers face sudden, drastic, unexpected and uncontrollable changes in their circumstances. The removal of options and agency is disempowering, disorienting and disheartening. Teachers' power to negotiate is reduced, their access to information curtailed, their entry into the labour market may be barred – at least to the formal market – and they may not be at all prepared for the sudden change in their situation. Added to this, they may have been subjected to physically or emotionally violent acts in their home country or en route to their host country, leaving them psychosocially vulnerable; their financial security may have been severely compromised and their ability to earn placed in doubt; their legal status may be unclear; and they may be subject to intimidation or abuse in their new surroundings. Their physical wellbeing may be diminished; they may be inadequately sheltered or nourished; their professional qualifications may be lost or not recognised; and their exit options may be limited or non-existent.

Work on identifying the issues affecting teachers in emergencies has already begun. In 2010, the INEE asked members what the biggest challenges were that teachers faced in crisis settings and how governments should be supported in reducing the teacher gap and upholding EFA commitments in crisis contexts. As well as identifying that 'Teachers are most needed in crises situations. Yet these are times when they are most difficult to recruit and retain' (INEE, 2010*b*: para 2), the consultation found that 'Stronger governmental support and policies are therefore needed to help and support teachers… around the world' (*ibid.* para 5).

14.8 Recommendations

Participants at the Sixth Commonwealth Teacher Research Symposium developed a series of recommendations that would apply to practices in host countries, as well as government-level policies and actions.[26] At the host country level, policy recommendations included mainstreaming migration issues into national policy and reducing barriers to integration into the (formal) labour market, which ultimately entails action by both policy makers and employers. Actions could also be taken to ensure reasonable security of employment for migrant teachers and to ensure that migration policy is sensitive to gendered needs. With regard to migration policy, fast tracking the official recognition of refugee status and of professional qualifications/ability to teach was also recommended. This might involve enabling the removal of bureaucratic hurdles to integration and movement of migrant teachers. Language policy could be revised to promote the recognition and utilisation of migrants' language, while also offering support for learning the language of the host communities. In host communities and the work environment, awareness-raising activities could be undertaken to increase sensitivity to migrants' needs. Such initiatives could be undertaken by employers, civil society organisations and teacher associations as well as by government at the national, regional, or local level.

Regarding education policy, recommendations included providing the professional development necessary for teachers to achieve the qualifications required to teach in

the formal system and creating pathways to achieve minimum standards in the host country. In the specific case of education in emergencies, the professional development and qualifications for programmes in the informal education sector must also be considered, which might include initiatives by NGOs. It was also recommended that a transitory mechanism be developed for teachers as yet unqualified under the host country system (or unable to demonstrate their qualification) as an interim measure, before qualification status is given, to enable teachers to teach. This might involve a competency-based rapid assessment of a teacher's ability in the classroom. An integrated migrant management policy between different authorities/agencies would encourage the rapid registration of teachers. Guidance on acceptable minimum remuneration for teachers could also be addressed, as could a promotion policy that does not discriminate against migrant teachers. Consideration of these issues could be included in proposals to donors and in donors' policies.

With specific regard to refugees, it is important to ensure that refugees are subject to equal treatment under the law protecting human rights and that fair and equal treatment of migrants is advocated. As such, creating and/or strengthening mechanisms to support refugee teachers in host countries is essential. This includes providing physical security, both within the classroom and in greater society and safe passage within the country. Governments might also consider a housing policy that would encourage teachers to stay where needed in order to mitigate the effect of the emergency on the provision of education.

Further research is needed on a variety of levels to address current knowledge gaps that challenge policy reform. There is very limited information on the role and status of teachers in emergencies, including teachers who are forced to migrate. In addition, more research is required about the refugee population itself, particularly with regard to the linguistic needs of the children and needs for teachers who could deliver education to the children. As Paulson (2011) notes, existing insights into education in emergencies are derived less from rigorous research than from the delivery and evaluation of educational programming. Alongside research into qualitative aspects, such as the issues affecting teachers' decisions, this paper argues for large-scale empirical studies that would establish, for example, the actual shortfall of teachers in various refugee environments. This would help to provide an evidence base for policy advocacy. Moon asks:

> How can the patterns of supply of teachers, particularly where 'crisis' situations exist, be monitored and analysed? In particular what forms of enquiry are needed to interrogate national and international statistical information? (2007: ix).

One of the lessons learned from the implementation of the CTRP is that very often the data on teachers is simply not available. Answering the above question will require considerable capacity building of national systems monitoring teacher supply and demand, stock and flow.

14.9 Conclusion

Well-managed teacher migration can contribute both to increased access to education for at-risk children (such as refugees) and the quality of education children receive, even in difficult circumstances. If teachers are prevented or discouraged from teaching by institutional barriers, it represents a double 'brain drain'; the teachers are benefitting the education system in neither their home country, nor their host country. While they may be contributing in other ways, this still represents a loss of investment in the teaching cadre – 'a denial of rights and a waste of humanity' (Smith, 2004: 38). It is critically important to provide frameworks which protect teachers, especially when cross-border migration is involuntary, as teachers are then at their most vulnerable. It is also important to acknowledge that, formally recognised and properly supported, these same teachers can present an important resource for host countries to educate children. Managing migration is thus a key factor in achieving MDG access and equity and EFA quality objectives.

It seems beyond doubt that the issue of forced migration needs to be specifically addressed in migration management policy. As conflict and natural (meteorologically induced) disasters seem set to increase, policy needs to expect the unexpected and plan for unanticipated cross-border migration of education professionals. The need to avoid exploitation of vulnerability; the exigencies of disaster preparedness; and the interests of international co-operation all point towards the requirement to set in place both national and regional policies to protect teachers forced to migrate, where they do not already exist. Emerging instruments for managing teacher mobility, recruitment and migration should recognise that not all migrant teachers choose to migrate and that this necessitates special consideration. As noted by IIEP, 'Good educational planning that anticipates and analyses risk contributes to building systems that are more resilient and therefore less impacted by emergencies' (2011: 23).

The fact that the length of the emergency is usually unknowable presents particular difficulties in accommodating teachers. Host governments may be concerned that refugee populations may become permanent over time. They may be reluctant to regularise conditions for teachers as this might be seen to encourage settlement. This paper does not argue for policies that promote settlement as their primary objective. It argues for policies that facilitate opportunities for teachers to maximise their potential, regardless of whether they are in temporary, permanent or unknown situations.

This study is not aiming to make a special case for teachers to have some sort of exemption to or fast track around immigration policies. All migrants, regardless of their profession or background, are worthy of and legally entitled to the same protection of their rights and all have their part to play in protecting and nurturing their own communities. Nor, while speaking about refugee teachers (and those applying for refugee status), should the needs of IDPs be lost sight of, as their needs are arguably even more urgent, as education quality in IDP camps is frequently more neglected than in refugee camps (Buscher and Makinson, 2006). It is recognised that immigration control is the right of a sovereign state, subject to its international obligations. However, it is also the duty of a state to realise the rights of refugees. The case of education in emergencies demonstrates the need for greater preparation and more consistency in international and national instruments dealing with forced migrants. And, because of the high profile of education and its symbolic value, advocating for refugee and forced migrant teachers is an access point for advocating for the rights of all refugees and displaced persons.

Muñoz puts forward the following recommendation for governments:

> Develop a plan that prepares for education for emergencies, as part of the general education program, to include specific measures for continuity of education at all levels and during all the phases of the emergency. Such a plan should include training for the teachers in various aspects of emergency situations (2010: 24).

To this we would add that governments consider in their plan the possibility that they might need to respond to an emergency originating not in their own territory but another, which nonetheless will encumber them with certain responsibilities for which they need to be prepared. Therefore they need to train education managers and immigration authorities in emergency preparedness and have in place a functioning institutional framework that enables refugee teachers to contribute towards ameliorating the situation. Building the capacity of governments to achieve this should be considered for inclusion in emergency responses, where it is not done already. But, as the World Bank puts it, 'Temporary labor migration to neighboring countries or farther abroad can provide job opportunities for skilled and unskilled laborers from fragile or conflict-affected countries and requires few reform elements' (2011: 162–163).

Developing a contingency plan for education in emergencies along the lines of those prepared by Inter-Agency Standing Committee Education Cluster is necessary but insufficient. Deeper penetration of the principles of preparedness is required, with policy and legislation in place that supports the positives and mitigates the negatives of forced

migration. This should be reflected in national policy and programmes not just in education, but in other affected sectors.[27]

Much has been written – justly so – about the rights of children to be educated in an emergency. But to be taught, children require teachers and therefore the protection of teachers' rights needs equal attention. With efforts increasingly focused on quality – again, rightly so – emphasis has been placed on teacher training, particularly the enhancement of teachers' methodology. It seems that the quantity challenge – the reduced number of teachers serving refugees – is mostly met by training new teachers from the community. This paper has argued for the greater inclusion in the policy debate of those refugee teachers who are qualified, experienced and potentially ready to teach, but who are prevented from doing so by institutional barriers. It is contended that potentially there are efficiency gains to be made in using pre-qualified teachers and that enabling long-term professionals to teach has the potential to reduce teacher turnover, which in turn will have a beneficial impact on educational outcomes and psychosocial well-being.

The Commonwealth Secretariat is therefore commissioning research that will attempt to identify the extent to which institutional barriers deter forced migrant teachers from teaching. The research will identify the issues affecting forced migrant teachers and the existing policies influencing their role and status, and analyse the connections between these issues and policies and forced migrants' ability to contribute towards education in emergencies. It will then formulate recommendations for policy-makers that will protect the professional role and status of teachers forced to migrate and enhance their ability to operate constructively in emergency conditions. It is anticipated that the research findings will be presented at the 18th Conference of Commonwealth Education Ministers, to be held 28–31 August 2012 in Mauritius.[28]

The authors of this paper would welcome further engagement with the education, development and humanitarian communities on developing this research agenda.

Notes

1 The Symposium Proceedings Report is available separately on the Commonwealth Secretariat and UNESCO-IICBA websites.
2 There is no single definition of a small state agreed by the international community, but population size is often used as a criterion. The World Bank defines a small state as one having a population below 1.5 million, as does the Commonwealth Secretariat, although the latter also in practice includes larger countries which exhibit other features of a small state. See further information in Briguglio, Persaud and Stern (2006).
3 For further information, see the Commonwealth Secretariat website: http://www.thecommonwealth.org/Internal/190663/190781/project_examples/
4 This definition is based on that of the Uppsala Conflict Data Programme: http://www.pcr.uu.se/research/ucdp/definitions/.
5 Source: UNESCO Institute for Statistics Data Center, available at: http://stats.uis.unesco.org/unesco/TableViewer/document.aspx?ReportId=136&IF_Language=eng&BR_Topic=0 (accessed 5 August 2011). Trained teacher percentage is 2009 or most recently available data.
6 Not all countries need to increase their number of teachers, but among the 207 countries that reported teacher data for 2008, it is estimated that 99 countries will need at least 1.9 million extra teachers between 2008 and 2015 to meet the Universal Primary Education (UPE) goals. More than half of them – 1,056,000 – are in sub-Saharan Africa (UIS, 2010).
7 The term 'institution' in this paper is generally used in the New Institutional Economics sense of a system of rights and obligations in the form of recognised, formal or informal, enforceable rules that enable individuals to co-operate to achieve common purposes by creating regularised role relationships (North, 1990). Institutions can be either constraining or enabling (Hodgson, 2006).
8 Regional Convention on the recognition of studies, certificates, diplomas, degrees and other academic qualifications in Higher Education in the African States. Available at: http://www.accesstosuccess-africa.eu/web/images/literature/mindafviii_arushaconv1.pdf.
9 Available at: http://www.ilo.org/public/libdoc/ilo/2006/106B09_343_engl.pdf.
10 Available at: http://www.ilo.org/ilolex/english/reportforms/pdf/22e118.pdf.
11 Available at: http://actrav.itcilo.org/actrav-english/telearn/global/ilo/law/iloc157.htm.
12 The Commonwealth Teacher Recruitment Protocol was adopted at a ministerial meeting at Stoke Rochford, Lincolnshire, UK on 1 September 2004. Available at: http://www.thecommonwealth.org/shared_asp_files/GFSR.asp?NodeID=39311.
13 Available at: http://apps.who.int/gb/ebwha/pdf_files/WHA63/A63_R16-en.pdf.

14 Available at: http://www.thecommonwealth.org/shared_asp_files/uploadedfiles/%7B7BDD970B-53AE-441D-81DB-1B64C37E992A%7D_CommonwealthCodeofPractice.pdf.
15 Available at: http://www.poea.gov.ph/.
16 TUNING Educational Structures in Europe started in 2000 as a project to link the political objectives of the Bologna Process and at a later stage, the Lisbon Strategy to the higher educational sector. The Bologna Process is a tool for student mobility and convergence in Europe started in 1998 with the aim of creating a European Higher Education Area by making academic degree standards and quality assurance standards more comparable and compatible throughout Europe to facilitate mobility and recognition, in particular under the Lisbon Recognition Convention. Available at: http://tuning.unideusto.org/tuningeu/index.php.
17 It is accepted that this is a naive assumption and that the factors affecting teacher migration may be different from the general population. This would be a fertile area for further research.
18 B Sesnan, personal communication with author, 6 October 2011.
19 Details available from http://www.ioe.ac.uk/PiTR08.pdf.
20 Personal communication with author, June 2011.
21 The start of the first civil war is usually dated to the refusal in 1955 of the students in Torit, South Sudan, to accept the Islamic week in their school.
22 Forced recruitment of older schoolboys and teachers was an important reason for fleeing in the early nineties and led to the disappearance of secondary schools in rebel areas for many years.
23 An important step for those working in rebel areas was around 1992 when the UN/NGOs Education Coordinating Committee in Nairobi adopted a modular training programme to which all NGOs and churches were supposed to sign up. Teachers could take month-long modules in their vacations and in theory they would accumulate a quasi-qualification. The modules were written and standardised by the Sudan Literature Centre run by Across in Nairobi. The first ones were on methodology, followed by some content. B Sesnan was part of this process.
24 See Sommers (2005*b*) for further information.
25 In a similar case, a dynamic young man set up the first secondary school in a makeshift set of huts in the camp. Then a well-meaning agency sent him away for three years to be trained, depriving the school of its vision and dynamism. This was also a common problem with Canadian scholarships – they took the best (who of course would not refuse to go) but despite pleading would not promise that they could come back to serve their people *and* retain their right to become citizens. These particular issues are sometimes the most important ones to address.
26 The Symposium Proceedings Report will be available from the websites of the Commonwealth Secretariat and IICBA shortly.
27 INEE provides an overview on Education Sector Contingency Planning, available at: http://www.ineesite.org/index.php/post/contingency_planning/.
28 Terms of reference for this research are available at: http://www.thecommonwealth.org/Shared_ASP_Files/GFSR.asp?NodeID=240158&AttributeName=File.

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