GLOBAL CAMPAIGN FOR

EDUCATION

policy briefing

# *Teachers For All: what governments and donors should do*

Over 1oo million children are currently denied their right to a primary level education. Between 14 and 22.5 million teachers need to be recruited, trained and provided with the right incentives in the next ten years if we are to give these children the quality public education they deserve by 2015 – the target date of the international community's Education For All and Millennium Development Goals. With these new teachers, all children will be able to be taught in classes of no more than 40 pupils per teacher. In countries where there is no shortage of teachers, many teachers are untrained and/or demotivated, which seriously hinders their ability to deliver quality education. Massive investment is needed from rich country donors to ensure there are enough trained and motivated teachers for all primary school aged children (including girls, boys, disabled children or children from ethnic minority groups, children living with or affected by HIV & AIDS or those displaced or affected by conflict and/or natural disaster).

This paper focuses on the situation of teachers in poor countries today, the problems they face and the detrimental effect these problems are having on children's ability to complete a good quality education. As well as setting out the problems faced by teachers, education managers and governments in poor countries, this briefing also collects together a range of solutions to the problems highlighted. These recommendations have been garnered from examples of best practice and from the opinions and voices of teachers and educationalists, as collected by member organisations of the Global Campaign for Education and from a review of recent literature on the situation of teachers in poor countries.

**CONTENTS**

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This report has been produced for the Global Campaign for Education[1] and is based on a review of recent literature on teachers' issues in poor countries, including UNESCO's Education For All Global Monitoring Reports, research produced by Education International[2] and VSO's Valuing Teachers[3] project, as well as reports published by member organisations of the Global Campaign for Education and other organisations. Statistical and financial data has been provided primarily by the UNESCO Institute for Statistics.

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This is an independent report, and does not necessarily reflect the views of all GCE member organisations. Any errors are the sole responsibility of the authors. This report was released in April 2006.

1 The Global Campaign for Education, founded in 1999, brings together major NGOs and teachers' unions in over 150 countries around the world. GCE promotes education as a basic human right, and mobilises public pressure on governments and the international community to fulfil their promises to provide free, compulsory public basic education for all people – in particular, for children, women and all disadvantaged, deprived sections of society.

2 Education International is an umbrella organisation of teachers' unions around the world, representing around 30 million teachers worldwide.

3 Since it's inception in 2000, VSO's Valuing Teachers project has used participatory advocacy research to explore teachers' views of their profession: what motivates them, what affects their morale, and what will help them perform well. Research has been completed in eight countries – Papua New Guinea, Malawi, Zambia, Guyana, The Maldives, Nepal, Rwanda, and Pakistan – and, in 2002, findings from the first three countries were synthesised in a policy research report outlining how teacher motivation and morale could be improved, entitled: *What MakesTeachers Tick?*

## ACRONYMS AND ABBREVIATIONS

| | |
|---|---|
| AIDS | Acquired Immunodeficiency Syndrome |
| CSO | Civil Society Organisation |
| DFID | UK government Department for International Development |
| EFA | Education For All |
| EI | Education International |
| EMIS | Education Management Information Systems |
| FTI | EFA Fast Track Initiative |
| GCE | Global Campaign for Education |
| GDP | Gross Domestic Product |
| GER | Gross Enrolment Rate |
| G8 | The 'Group of Eight' nations[4] |
| HIPC | Highly Indebted Poor Countries |
| HIV | Human Immunodeficiency Virus |
| ICT | Information and Communications Technology |
| ILO | International Labour Organization |
| IMF | International Monetary Fund |
| ISCED | International Standard Classification of Education |
| MDG | Millennium Development Goal |
| NGO | Non-Governmental Organisation |
| OED | World Bank Operations Evaluation Department |
| PTR | Pupil–Teacher Ratio |
| SADTU | South African Democratic Teachers' Union |
| UBE | Universal Basic Education |
| UIS | UNESCO Institute of Statistics |
| UNESCO | United Nations Educational, Scientific and Cultural Organization |
| UNICEF | United Nations Children's Fund |
| UBE | Universal Basic Education |
| UPE | Universal Primary Education |
| VSO | Voluntary Service Overseas |

4 The G8 comprises the United Kingdom of Great Britain and Northern Ireland, the French Republic, the Russian Federation, the Federal Republic of Germany, the United States of America, Japan, the Republic of Italy, and Canada. The European Commission is also represented.

## 1. INTRODUCTION AND RECOMMENDATIONS

The crisis in the teaching profession is threatening the ability of poor countries to reach internationally agreed targets to expand and improve education. In many countries, the teaching force is demoralised and divided. Teachers previously benefiting from considerable public respect and reasonable financial reward, feel that their status is in decline. Yet, in recent years, governments and donors have been slow to recognise this fundamental importance of teachers in their efforts to deliver quality public education. This failure has led to a situation today where over '18% – or almost one in five – of the world's 650 million children of primary school age are not in school' (UIS/UNICEF, 2006:18–19). This represents over 100 million children. The majority (53%) of them are girls[5]. Half of Africa's children will never finish primary schooling. Offering free primary education to every child is the only way to ensure that no child is denied their right to quality basic education. But, as making education free increases demand, investment in teachers, training, materials, and reduced class sizes is needed to increase supply, without forsaking quality.

The promise, made by rich country donors at the G8 in 2005, of US$10 billion per year in aid to education by 2010, must be met and brought forward. The aid must be given long term and should be predictable. Critically, this will enable countries to train and employ the 14–22.5 million teachers that are needed worldwide (UIS, 2006), and pay them a living wage.

This paper focuses on the situation of teachers in poor countries today, the problems they face and the detrimental effect these problems are having on children's ability to complete a good quality education. As well as setting out the problems faced by teachers, education managers and governments in poor countries, this briefing also collects together a range of solutions to the problems highlighted. These recommendations have been garnered from examples of best practice and from the opinions and voices of teachers and educationalists, as collected by member organisations of the Global Campaign for Education and from a review of recent literature on the situation of teachers in poor countries.

All primary school age children – including those currently excluded from or discriminated against at school (for example, girls, disabled, ethnic or caste minority children and children living with or affected by HIV & AIDS) – have the right to be taught by professionally trained teachers in classes of no greater than 40 pupils. Indeed, teachers are the most valuable resource available to promote gender, class and racial equality and inclusive practices that tackle prejudice and discrimination in wider society as well as in schools. 'If [teachers] do not believe in inclusion, they can become a major barrier to progress' (Miles, 2005:72). The training and support that teachers receive is therefore fundamental to whether they will take up attitudes and practices that exclude or support children. However, at present, teaching professions in many countries are themselves exclusive of women, disabled people, ethnic minorities and other marginalised groups.

Trained and motivated teachers are by far the most crucial ingredient in the provision of quality education for all. Other inputs, such as investments in school buildings, school feeding programmes or ICT (information and communications technology), are doomed to fail if there are not enough teachers in a school for them to be able to teach effectively, or if teachers have received little or no training. A major push on all fronts is needed to secure a professionally trained, well-supported and highly motivated teacher workforce. This 'big push' is needed now if year 1 enrolments are to reach 100% by 2008, as they must if we are to meet even the minimal 2015 targets set out in the Millennium Development Goals[6] (MDGs). The broader Education For All

5 '...61.6 million girls of primary school age around the world are not in school, compared to 53.8 million boys...While 16% of the world's primary school age boys are out of school, the figure is higher for girls at 20%. In short, one in five eligible girls does not go to school' (UIS/UNICEF, 2006:19).

6 The education-related Millennium Development Goals aim to:

- ensure that, by 2015, children everywhere, boys and girls alike, will be able to complete a full course of primary schooling
- eliminate gender disparity in primary and secondary education preferably by 2005 and to all levels of education no later than 2015.

(EFA) goals[7] demand even greater efforts than the MDGs. At present, the MDG framework has tended to reduce the education focus of donors to universal primary education and gender parity (in primary and secondary education – a goal that rich countries committed themselves to help poor countries achieve by 2005, but failed abysmally), limiting governments' efforts to engage in the fuller EFA agenda.

Most poor countries' governments are fully committed to achieving the EFA goals, and some have drafted detailed and highly credible plans in consultation with teachers' unions, civil society organisations or coalitions and other education stakeholders. Yet despite donor commitments to finance all credible EFA plans, many countries' plans remain chronically under-funded, as donors repeatedly fail to deliver the urgently needed funds. As a result, governments are revising their ambitions, and plans are being scaled down to fit available resources. Consequently, sufficient numbers of teachers cannot be hired and millions of children will remain excluded come 2015 – unless urgent action is taken now. The US$10 billion per year in aid for education that donors last year promised will be delivered by 2010, needs to be delivered now. Governments cannot wait until 2010 to hire the teachers they need.

To help governments and donors address these problems, each chapter of this report closes with a summary of recommendations drawn from the discussion and analysis in the chapter and from the literature reviewed therein. It is hoped that Global Campaign for Education national coalitions, teachers' unions, NGOs, child rights organisations and other members and allies of the Global Campaign for Education will be able to adapt these recommendations for use in their discussions with governments and donors. The recommendations are reproduced here, arranged according to the themes of the chapters to follow:

### *Recommendations on teacher shortage and supply*

- The MDGs will not be achieved without universal access to quality basic services provided by strong public systems. This will require a massive investment by poor country governments and donors in rebuilding the public sector, including investing in recruitment, training and salaries for 14–22.5 million extra teachers (as well as millions of health workers and other public sector workers), and an end to user fees (Oxfam, 2005:1).

- Governments and donors must work together to reduce pupil–teacher ratios to 40:1 (which should be seen as a maximum in all regions of a country, not an average, nor a target to which pupil–teacher ratios should be raised). Classes with high proportions of first generation learners should be smaller than 40:1 to allow teachers to give such children the extra attention they need – especially where children speak a different language to their teachers. Double and triple shifting should be avoided unless different teachers are used for different shifts.

- Lower secondary education should be expanded to at least 35% enrolment to ensure adequate numbers of potential teacher trainees.

- Governments must put in place adequate monitoring systems for measuring the impact of the HIV & AIDS pandemic on education. This should include gender disaggregated data. In particular, education management information systems (EMIS) need to be strengthened in order to capture data on teacher absenteeism and mortality as a result of AIDS. As a minimum, governments should protect teachers by developing an HIV & AIDS workplace policy in order that bouts of absenteeism, either for caring or for sickness, are formally recognised and respected.

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7 The Education For All (EFA) goals, (agreed in April 2000 by heads of state, ministers of education, heads of UN agencies, among others) committed governments to achieving the following goals by 2015:

- expand early childhood care and education
- ensure all children, particularly girls, complete free and compulsory, good quality primary education
- ensure equal access to learning and life-skills training for young people and adults
- achieve a 50% improvement in adult literacy rates
- achieve gender *equality* in primary and secondary education
- improve the quality of education – especially in literacy, numeracy and essential life skills.

- Women and members of marginalised groups (such as disabled people, members of ethnic minorities and people living with or affected by HIV & AIDS) should be actively encouraged to enter the teaching profession, through positive discrimination in the form of quotas, scholarships, and lower entry requirements. These should be combined with specific additional support and training to help them attain the national minimum qualifications required to teach.

- Bilingual education should be an urgent priority in countries with linguistic minorities (or majorities). Teachers (of whatever ethnicity) should be trained and equipped to teach primary school children in their mother tongue.

- Donor countries must guard against deliberately recruiting teachers from poor countries that can ill afford to lose them, while teachers' rights to migrate should be protected. To that end, the 2004 *Commonwealth Teacher Recruitment Protocol* should be expanded to cover non-Commonwealth countries.

***Recommendations on teacher training***

- Teacher training capacity – both pre- and in-service – needs to be increased in many poor countries. Governments should work with donors to ensure teachers are provided with an adequate length and quality of training to enable them to deliver quality education. Donors should encourage governments to be more ambitious about the length and quality of training (by offering increased funding). They should recommend a combination of at least an upper secondary qualification and one or two years' pre-service teacher training, plus substantial in-service and continuing professional development programmes to enable teachers already in the system to upgrade their qualifications.

- Para-teacher programmes and mandatory retirement measures should be phased out within five years[8]. EFA plans that include such measures should be revised in consultation with teachers' unions and adequate financing should be provided by rich countries to allow governments to upgrade the skills of teachers recruited on para-teacher schemes. The 1966 ILO/UNESCO *Recommendation Concerning the Status of Teachers* should act as a guide for governments and donors seeking to reform such schemes.

- Pre-service and in-service teacher training colleges should coordinate their training and continuing professional development programmes so that newly qualified teachers and already employed teachers are able to benefit from knowledge of new methodologies and content, and so that governments are able to deliver the same quality of education across a country or region.

- All teachers should be provided with training and access to information about inclusion, focusing on gender, disability, ethnicity and HIV & AIDS and child-centred pedagogy as part of their pre- and in-service teacher training. Both pre- and in-service training should focus on enabling teachers to assess and meet the needs of individual children, rather than on generic categories of 'problem children', and on increasing their confidence to apply inclusive practices to their work.

In countries with a shortage of female, disabled or ethnic minority teachers, or with disparities in levels of teaching qualifications:

- Specially designed in-service training should be organised for female, disabled and ethnic minority teachers to compensate for the qualification disparities with other teachers. Such in-

8 It should be noted that in some exceptional or extreme situations, such as large-scale emergencies or chronic conflict, para professional teachers may be the only option, and, as such, their employment, training and support would be supported by the Global Campaign for Education as a crisis measure.

service training should be coordinated to ensure that it is relevant to local needs and that teachers in all areas of a country receive a similar quality of training.

- Positive discrimination policies should be built into posting and promotion systems to ensure all schools have representative numbers of female, disabled and ethnic minority teachers and to give such teachers access to more senior positions, where they are currently under-represented.

In both high and low HIV & AIDS prevalence countries:

- High priority must be given to training teachers to teach about HIV & AIDS. Both in-service and pre-service teacher training should include compulsory HIV & AIDS components that are examinable or certifiable. Teachers and their unions must be involved in the design and roll-out of such programmes. These programmes must be based on accurate and appropriate information that goes beyond simple prevention messages and the ABC (abstinence, behaviour change and condoms) approach (GCE/ActionAid, 2005b:8).

- Ministries of education must clearly define the rights of children living with HIV & AIDS in schools, as well as the rights of education workers living with HIV & AIDS. Workplace policies, procedures and regulations must be put in place to respond to the needs of teachers and staff living with HIV & AIDS. These should include leave policies that take account of caring responsibilities, access to confidential voluntary counselling and testing services and affordable treatment, and a principled statement from the ministry highlighting zero tolerance towards stigma and discrimination against learners and teachers.

***Recommendations to improve teacher motivation, morale and status***

The 1966 ILO/UNESCO *Recommendation Concerning the Status of Teachers* provides ready-made recommendations for governments and donors on teacher salaries:

**1966 ILO/UNESCO *Recommendation Concerning the Status of Teachers***

'Teachers' salaries should:

(a) reflect the importance to society of the teaching function and hence the importance of teachers as well as the responsibilities of all kinds which fall upon them from the time of their entry into service;

(b) compare favourably with salaries paid in other occupations requiring similar or equivalent qualifications;

(c) provide teachers with the means to ensure a reasonable standard of living for themselves and their families as well as to invest in further education or in the pursuit of cultural activities, thus enhancing their professional qualification;

(d) take account of the fact that certain posts require higher qualifications and experience and carry greater responsibilities' (ILO/UNESCO, 1966:11–12).

In addition, the following recommendations on teacher motivation, morale and status can be drawn from the discussion in chapter 4 of this paper.

- Salary levels should be decided nationally in properly organised collective bargaining procedures with teachers' unions, using comparisons with similar professions in the same country and with teaching positions in neighbouring countries as a starting point.

- In countries with large non-state sectors with different salary structures, rich countries must work with governments to bring all teachers onto the same government payroll, bringing

schools that have been privatised or 'sub-contracted' out to non-state providers back into the government system.

- Governments should work together with teachers' unions and civil society education coalitions at national, regional and international levels as allies to lobby donors for increased, long-term, predictable aid to finance increases in teacher salaries, as well as increases in teacher recruitment and training costs.

- Where decentralisation of salary payment, policy communication and consultation, and monitoring and evaluation has taken place, high priority should be given to the improvement of those systems and capacity development, as well as improved incentives, training, professional development and management for district or provincial staff newly responsible for paying salaries.

- Housing, travel, health and other incentives and benefits should be used as a complement to salary rises – especially in rural or otherwise disadvantaged areas, where 'hardship' allowances can also be utilised.

- The introduction of both pre- and in-service training and professional development programmes for head teachers and other education managers should be a high priority. Head teachers and other managers also need to be equipped with enough support staff to perform the required administrative tasks and free up managers' time for teacher management.

- National policy makers should ensure that schools include more promotional levels to allow teachers to progress up the pay scale and be rewarded for good performance. Continued professional development programmes should work alongside the promotion system to ensure development opportunities are provided for future educational leaders and managers.

- Safeguards and disciplinary procedures should be put in place – in the form of laws, guidelines, codes of ethics, and monitoring and evaluation systems – to prevent discrimination against and promote equal opportunities for female, disabled, ethnic or caste minority, or HIV positive teachers in promotion procedures and the allocation of privileged duties.

- Two-way communication and consultation mechanisms (such as newsletters, participatory action research, opinion polls, surveys, questionnaires and radio and television phone-in discussions – as well as more formal consultative meetings and workshops) should be instituted to allow all stakeholders to feed in their ideas on national level policy proposals and on implementation successes and problems. Opportunities for consultation on national reform plans should be well advertised and held in all areas of a country, in locations that are accessible for rural as well as urban-based teachers.

- At the very least, ministries of education should engage in regular and constructive dialogue about education evaluation and reforms with teachers' union representatives and civil society education coalitions. Teachers' unions should be supported by governments, donors and international NGOs to develop holistic positions on quality education issues and government policy and practice.

- Media, public awareness or teacher recruitment campaigns should be used to enhance the image of teachers by highlighting messages about successful and motivated teachers, and students who are succeeding because of their teachers' efforts.

- Adequate arrangements should be made for maternity and paternity leave, and both male and female teachers should have the right to request temporary part-time hours upon their return to work, without loss of pay, pension rights or opportunities for promotion. To encourage women to enter or remain in the teaching profession, other benefits such as housing close to schools, posting female teachers in schools near their own communities and lower entry requirements for teacher training colleges should also be instituted.

### *Recommendations on the costs of quality teaching*

Poor country governments must:

- develop long-term and ambitious plans for achieving Education For All, including developing projections for year-on-year increase in teaching force to 2009 to accommodate all children in school and in classes of under 40 pupils
- allocate at least 3% of GDP to basic education and 20% of the budget to education
- abolish user fees in education while mobilising sufficient domestic and external finance to expand systems and improve quality
- work with teachers' unions to establish transition mechanisms so that within five years, untrained and contract teachers can be absorbed into the profession
- target national education plans at those most excluded from education, including girls, disabled children, or children from ethnic minorities, living with or affected by HIV & AIDS, or displaced or affected by conflict and/or natural disaster. Flexible education policies and dedicated resources are needed to ensure that difference and diversity are valued, that discrimination and prejudice are actively combated, and that gender, class and racial equality are promoted. Aid must be directed at supporting inclusion, which is the best strategy to achieve quality education for *all* children.

The IMF and World Bank must:

- encourage governments to develop long-term education strategies based on robust projections of human resource needs to enable all children to enter school and be taught in a class of no more than 40 pupils
- work with governments and donors to ensure that poor countries are afforded the maximum fiscal space to enable the expansion of the teacher workforce
- formally rescind the 3.5 x per capita GDP indicator in the Education For All Fast Track Initiative (FTI) framework.

Rich country governments must:

- meet the target of giving 0.7% of Gross National Income to assist poor countries and cancel unpayable debt of all poor countries
- allocate their 'fair share' of aid to basic education, allocating the majority of financing through the Education For All Fast Track Initiative
- fund recurrent costs and ensure predictability of aid over a ten-year time period
- support the Netherlands government proposal for reform of current FTI mechanisms to allow upfront commitments to forthcoming plans to be made
- promote abolition of user fees but ensure funds are sufficient to employ enough teachers to meet increased demand.

### *Limitations of the report*

This report focuses primarily on primary teachers (although some of the general statements about motivation or management apply just as equally to other levels, and some country level examples refer to secondary education). The Global Campaign for Education recognises that for primary education to succeed, provision of early childhood care and education, and secondary and adult literacy education also needs to be improved dramatically in many countries. For example, it is a matter of record that 'no country today has achieved over 90% primary net enrollment without having at least roughly 35% secondary net enrollment' (Clemens, 2004:19). As is discussed in chapter 3, an adequate level of secondary education is vital to enable countries to produce enough new teachers to deliver primary education. The Global Campaign for Education believes that access to free public education should be expanded from Universal Primary Education (UPE) to Universal Basic Education (UBE), the definition of which includes lower secondary education as well as early childhood care and education, and adult literacy education. However, data availability is such that it is difficult to disaggregate information about teachers employed in lower secondary schools

(which may be provided fee-free) from those employed in upper secondary schools (which may be fee-paying), as countries do not always make a distinction between the two, and secondary teachers may teach classes of children at both lower and upper stages. It may be possible to determine how many lower secondary teachers are needed for 35% net enrolment in secondary education, which would undoubtedly raise the number of teachers needed for UBE significantly. However, UNESCO has not yet made these calculations, or calculations about the additional teachers and educators required to improve early childhood care and education and adult literacy education. There is clearly a need for these calculations to be made, to enable policy makers to get a full picture of the global teacher requirements.

## 2. THE WORLD DESPERATELY NEEDS MORE TEACHERS

### *Between 14 and 22.5 million teachers are needed for primary education alone*

The teacher shortage crisis faced by poor countries is dramatically illustrated by the UNESCO Institute of Statistics just-released estimate that between 14 and 22.5 million teachers will need to be recruited and trained by 2015 (UIS, 2006). The need for teachers varies from country to country, but the countries with the greatest need are reported to be in sub-Saharan Africa, South and West Asia and the North African and Arab states – the same regions that have furthest to go to achieve 100% primary school enrolment and completion rates (Duthilleul, 2004:4). As the total number of teachers working in schools across the world currently stands at around 26 million, even the lower end of this estimate amounts to more than a 50% increase in the size of the global teaching force.

This staggering number of extra teachers needed to provide good quality primary education to all children by 2015 begins to make sense when compared to the estimated 200 million children that will enter primary schooling between now and 2015. This includes the estimated 100 million or more primary-school aged children who are not in school today, plus the estimated increases in the primary-school aged population that will result from current forecasts of population growth during the nine years left until 2015 (DFID, 2005:7). If the teachers, educators and teacher trainers required for the planned expansion of early childhood care and education, lower secondary education and adult literacy programmes (all part of the now widely accepted definition of basic education, and key planks of the EFA goals) are also factored in, the number of teachers needed could be considerably higher.

> *'Africa is undergoing a teacher shortage of critical proportions. Ghana has just a quarter of the teachers it needs and Lesotho only a fifth... Large sums must be invested in teacher training, staff retention and professional development. Teacher/child ratios should be brought to under 1:40 in basic education. Donor countries and international financial institutions must change their policies to allow recurrent expenditure – including teachers' salaries – to be paid for from aid' (Commission for Africa, 2005).*

If the global figure is shocking, the numbers of teachers needed at country and regional level often means a doubling of the teacher workforce. UNESCO's 2006 *Education For All Global Monitoring Report* cites examples such as Cameroon, which could need an additional 22,000 teachers, and Bangladesh, which could require an extra 167,000 by 2015. sub-Saharan Africa alone is estimated to be in need of at least 4 million additional teachers to enable governments to provide universal access to primary education (UNESCO, 2006a; DFID, 2005:11).

> *Burkina Faso, Mali and the Niger, where GERs [Gross Enrolment Ratios] are still low, would each need to increase teacher supply by 20% per year. The number of teachers in the Niger would need to quadruple, from 20,000 to 80,000 in the next ten years or so. Even in countries that would need only moderate teacher supply growth rates, such as Bangladesh (4%) and Cameroon (3%), this would involve huge absolute increases: from 49,000 to 71,000 teachers in Cameroon and from 315,000 to 482,000 in Bangladesh' (UNESCO, 2006a:87).*

The teacher shortage crisis is not simply a result of population growth, however. Quality education is still a dream in many countries that are struggling with unacceptably high pupil–teacher ratios and class sizes. In Zambia, for example, the government projects a pupil–teacher ratio of 64:1 within its education sector plan (GCE, 2005:3). As well as large class sizes, lack of funds is causing many governments to resort to cost-cutting measures such as the employment of untrained 'para-teachers'[9], employed at lower salary levels. The use of double or triple shifting (in which the same teachers are expected to teach two or three different shifts of children per day) or multi-grade teaching (whereby teachers are expected to teach differently aged children, at different stages of

9 The decline in the quality of education wrought by the mass recruitment of 'para-teachers' is discussed in greater depth in chapter 3.

their studies in the same classroom) is also widespread. The effect on teachers is not only demoralisation[10], but also exhaustion.

One of the effects of poor quality training, large class sizes and overloaded teachers is high repetition rates, which intensifies even further the need for more teachers. In Mozambique, for example, 21% of children have to repeat a year of schooling in order to advance to the next grade. This combines with a projected growth in the primary school age population between now and 2015 of 14%, and a current average pupil–teacher ratio of 65:1. Even if repetition rates can be reduced to 10% – half the current rate – if Mozambique is to reach a pupil–teacher ratio of 40:1, the teaching force must grow by 7.5% per year to reach 121,000 in 2015 – more than twice its current size of 55,000 (Bruneforth, 2006).

> '*Assuming current upper secondary enrolment ratios, hiring all upper secondary school leavers as teachers would not even be sufficient to cover the demand in 2010*' (Bruneforth, 2006).

### *Overcrowded classrooms: the impact on quality*

> '*Class size should be such as to permit the teacher to give the pupils individual attention. From time to time provision may be made for small group or even individual instruction for such purposes as remedial work, and on occasion for large group instruction employing audio-visual aids*' *(ILO/UNESCO, 1966:10).*

Rich countries in North America and Western Europe benefit from pupil–teacher ratios that are generally below 20:1, allowing teachers to provide individual attention to each student. In stark contrast, UNESCO's 2006 *Education For All Global Monitoring Report* records that some 45 countries around the world have pupil–teacher ratios higher than 35:1 – the majority of them in sub-Saharan Africa and South Asia. Pupil–teacher ratios rise to almost double that (and more than triple the average in rich countries) reaching 70:1 in some countries, including Mozambique, the Congo and Chad, and urban primary schools in Ethiopia and Pakistan struggle with more than 80 children per class (UNESCO, 2006a:85–87; DFID, 2005:33).

***India***

'"You have heard the outcry of the teachers assembled here. Their outcry is not first and foremost on their salaries; their outcry is on their sense of being professionals. Worldwide I hear many teachers who share with me their feelings of embarrassment and shame. They go home frustrated because they have – again – been confronted with the impossible task to teach 80 or more children. You can be frustrated once or twice, but not on a day to day basis. That leads to cynicism and demotivation and high stress levels amongst educators" Eswaran, General Secretary of the All India Primary Teachers Federation (AIPTF) and member of the EI Executive Board' (Education International, 2006b:7).

***Afghanistan***

The pupil–teacher ratio in Afghanistan was reasonably low – 32:1 – in 1998, yet by 2002, the ratio had doubled to 61:1. This was the result of the enrolment of large numbers of new pupils, especially previously excluded girls, in primary school. Class sizes rose so dramatically because few new teachers were hired to cope with the influx (UNESCO, 2006a:85).

***Tanzania***

'One of the problems facing the primary education sector in Tanzania is that of teacher deployment. The overall Pupil–Teacher Ratio has increased from 40:1 in 1999 to 57: 1 in 2003. This means that despite having recruited more teachers, this recruitment has not matched the increase in pupil enrolment. There are also wide variations in pupil–teacher ratios between and within regions, from a low of 40:1 in Kilimanjaro region to a high of 1: 73 in Mwanza Region' (Sumra, 2005:44).

10 Teacher motivation and morale is discussed in chapter 4.

***Cameroon***
'Four teachers for six classes – this is the reality at the state school in Balepipi (some 300 km northwest of Douala). Made up of three adobe bungalows, it suffers from a chronic shortage of teachers, as do many schools in Cameroon. Such a situation – which some might consider "normal" for an African country – is particularly regrettable in view of the fact that, at the same time, thousands of qualified teachers are unemployed or have gone on strike to demand the payment of over 30 months' salary arrears... In Cameroon, there are officially some 11,000 primary state schools, with 55,266 primary school teachers catering for 3 million pupils. This gives us an average teacher/student ratio of 1:54, well below the minimum standard set by UNESCO, i.e. one teacher per 45 students' (Education International, 2006c).

Pupil–teacher ratios as high as these make classes overcrowded and unmanageable: teaching becomes little more than crowd control. In such situations, moves away from 'chalk and talk' rote learning, recommended as long ago as 1966 in the ILO/UNESCO *Recommendation Concerning the Status of Teachers,* towards participative teaching and learning methodologies (involving small group work and individual attention), become unthinkable.

> '*[The] expansion of educational opportunity and the concomitant demand for teachers tend to put quality at risk if entry requirements for teachers are relaxed and/or the workload of the current teaching force increases... In countries where PTRs [pupil–teacher ratios] are already very high, further demands on teachers could be detrimental to teacher capacity and morale and result in diminished learning outcomes among students' (UNESCO, 2005a:115).*

The effect of unwieldy class sizes on the quality of teaching and learning in poor countries' primary schools can only be negative. Maintaining small classes is especially important in countries that are struggling to open up access to education to all their children. Those countries that have recently abolished fees, for example, are welcoming thousands of children into education from communities never before served by schools. UNESCO argues that first generation learners actually need smaller class sizes than children from communities long served by primary education. This is because such children are usually from disadvantaged social groups and are more likely to belong to an ethnic, caste or class minority whose language or dialect may not be used as the medium of instruction (UNESCO, 2005a:114).

As the parents of first generation learners have, by definition, never experienced education, such children are further disadvantaged due to their parents' inability to help them with their homework or communicate with their children's teachers as effectively as educated parents are able to. In short, children and parents from communities engaging with education for the first time are often disadvantaged by a home life and cultural capital[11] that diverges dramatically from that of the school, teachers, and education managers. Such children need extra attention from their teachers to enable them to achieve the same learning outcomes as more advantaged children. Yet it is more likely that they will find themselves in huge classes with untrained teachers, as entry requirements for teachers are relaxed and training is compressed to cut costs and meet the demand for extra teachers.[12] The predictable result is not just large numbers of children dropping out (or, more accurately, being pushed out) after their first or second year at school, but also that schools end up reproducing the very inequalities education is meant to tackle.

Teachers (and head teachers, who are often required to teach a number of classes themselves or cover for unrecruited or absent teachers in addition to their administrative and managerial duties) become exhausted and demoralised by the increased workload caused by increasing class sizes, as this example from Pakistan illustrates:

11 Cultural capital is a concept that explains how poor and working class students arrive at school at a disadvantage to better off or middle class children, who come to school armed with the advantage of sharing the same culture, language or vocabulary and the same attitudes and patterns of behaviour as their teachers.
12 The decline in the quality of teacher training is discussed in chapter 3.

***Pakistan***
'Teacher shortages result in high student–teacher ratios, which undermine the quality of education provided to students as well as overburdening teachers. In addition, support staff (cleaners, guards and gardeners) [are]... often lacking, which prevents teachers from concentrating on their core activities. "I feel so overwhelmed with teaching classes that I spend my weekends dealing with all administrative and clerical matters" Head teacher of a girls' school in Rajanpur' (Choudhury, 2005:12).

### *Causes of the teacher shortage crisis*

#### 1. Increased enrolments

> '*Without significant contingent commitments from donors, those countries that undertake a major expansion of access to education can suffer serious declines in quality – the student–teacher ratio may zoom to 100:1...in ill-equipped classrooms*' *(Sperling and Balu, 2005:2).*

In response to pressure from the international community, from national EFA and GCE coalitions, teachers' unions and parents' groups, governments in a number of countries have taken the bold decision to abolish user fees for primary education in recent years. The governments of Uganda, Kenya, and Tanzania all saw enrolments skyrocket by millions overnight after they delivered on their commitments to abolish fees. 'In Uganda, enrolment rose in 1996 from 3.4 million to 5.7 million students; in Kenya in 2003, from 5.9 million to 7.2 million students; and in Tanzania in 2002, from 1.5 million to 3 million students' (Sperling and Balu, 2005:2).

Clearly, such dramatic – and very welcome – increases in student numbers require extremely careful planning by governments (and by donors that offer to fund such expansions) to avoid a drop in the quality of education (DFID, 2005:12). The key ingredient to ensure that class sizes don't mushroom to unmanageable levels is heavy investment in the recruitment, training and retention of teachers. But, without external help, most poor country governments cannot respond to the urgent need for more trained and motivated teachers because they cannot afford to increase their education spending – without cutting back on spending on vital health or social services. This may be impossible in countries that are also trying to abolish user fees for health and social services in order to make them accessible to all.[13] The situation is particularly problematic where HIV & AIDS has placed an even greater burden on these already overstretched services. Some countries try to restrict pupil–teacher ratios to the World Bank's recommended level of 40:1, but schools trying to stick to these ratios quickly run out of places to offer to children, and have to choose between turning children away or increasing their class sizes. Often they have no choice but to comply with government enforced rules and so children remain excluded. The only real solution is to employ more teachers (GCE/ActionAid, 2005a:20–21).

This will require a significant increase in resources, which undoubtedly means an increase in the amount of external financing. Donors often suggest myriad ways that governments can increase education budgets by reallocating money between sectors (from military or infrastructure spending to education, for example) or save money by reallocating teachers and resources between education sectors, increasing taxation or improving the collection of taxes. But while budget reallocations (from higher education to primary education) may be necessary, in some cases, to ensure education spending is more equitably focused on the most disadvantaged, such budget reallocations and tax rises are often extremely politically sensitive and difficult to implement. However many efficiency savings governments make, it is rarely enough to fund expansion on the scale illustrated above, without sacrificing quality. In many cases, increased external financing is the only viable answer. Lack of donor commitment to fund expansion of basic education by funding teacher training and salaries, coupled with International Monetary Fund conditions that restrict governments' ability to increase their education budgets by accepting money from donors that are willing to provide it, are

13 A major new report will be released by Oxfam International in summer 2006, which will stress the importance of building strong public systems in getting essential services to poor people.

themselves two majors cause of the teacher shortage crisis. These will be discussed in more detail in chapter 5.

***Kenya***
'Kenya, in the wake of eliminating user fees, is unable to hire the estimated 60,000 teachers required to staff the expanding number of students enrolled in schools. The reason? To contain recurrent expenditure to "sustainable levels" (as defined by the IMF), meaning that teacher numbers were to be frozen at the 1998 level. In 2005, the IMF continued to recommend that the wage bill be reduced from 8.5% of GDP in 2005/6 to 7.2% by 2007/8... As a result, classrooms are overcrowded with an average pupil to teacher ratio of over 60:1 (and class sizes in lower grades often exceeding 100 children). The quality of learning is deeply affected by such ratios... In real terms, it can be estimated that within the last decade, Kenya has jeopardized the education of over nine million children. Only about half of those who register in class one finish class eight, and out of that figure, only half access secondary education. This year, over 340,000 could not be admitted in secondary schools. Over 1.5 million children are still out of school due to school-related expenses that poor families are ill equipped to afford' (GCE/ActionAid, 2005a:21–34).

***Malawi***
'When Malawi eliminated fees in 1994 enrollment increased by 51% from 1.9 million to 3 million necessitating a 75% increase in the number of teachers. To meet this demand about 20,000 untrained teachers were recruited and deployed after a three-week induction course. Simultaneously, about 4000 retired teachers were recalled to service. Government was unable to allocate sufficient funds to meet the demand and the response from donors was poor. As a result there was overcrowding in schools, the ratio between the numbers of pupils and permanent classrooms rose to 119:1 and that between pupils and textbooks to 24:1' (DFID, 2005:12).

***Nepal***
'The government has declared free primary education but failed to provide enough teachers to maintain the standard teacher–student ratio... Teachers' salaries used to be covered by the fees charged to students. However, because of the insurgency and political pressure, schools have recently lost this significant portion of their income as student unions, and in particular a student wing affiliated to the Maoist rebels, have forced schools to stop charging fees of any kind, arguing that secondary education should be freely offered by the government. But the government has failed to provide adequate financing for teachers' salaries in schools that have dropped user fees. Such teachers can therefore no longer be paid' (Shrestha, 2005:19–22).

## 2. The impact of HIV & AIDS

> *'A complete primary education can halve the risk of HIV infection for young people; and in fact, basic education has such a powerful preventative effect, especially for young women, that it has been described as the "social vaccine". As the epidemic gathers pace, however, it poses increasing risks to education itself, threatening to stop children from enrolling, teachers from teaching and schools from functioning' (GCE/ActionAid, 2005b:3).*

The impact of HIV & AIDS on teachers has at least four dimensions, which are most striking in high prevalence countries:

1. increased teacher mortality
2. high levels of HIV & AIDS-related absenteeism
3. the need for teachers to receive training to enable them to deliver HIV & AIDS prevention messages to their students and deal effectively with the specific needs of students living with or affected by HIV & AIDS
4. the stigma and discrimination experienced by teachers and students living with or affected by HIV & AIDS. Stigma and discrimination is also a significant issue in low prevalence countries, where challenges facing people living with HIV & AIDS may be even greater than in high prevalence countries.

Training for teachers is therefore a high priority in all countries. This chapter will address HIV & AIDS related teacher mortality and absenteeism issues, while training, stigma and discrimination issues will be explored in chapter 3.

*Increased teacher mortality*

There is some controversy about whether teachers' AIDS-related mortality rates have been affected by improved behaviour change and knowledge and use of antiretroviral drug treatment. It is argued that teachers are more aware of prevention information and are more able to access treatment if they do become infected than the general population, because of their higher levels of education (Bennell, 2005). Nevertheless, there is compelling evidence that teacher mortality rates are likely to grow over time (UNESCO, 2005a:112) and are already doubling in the worst affected areas, thereby exacerbating or even causing teacher shortages (UNESCO, 2006a:87). For example, in Zambia it is estimated that in 2000, 815 primary school teachers died as result of AIDS-related illnesses – a figure that amounts to the equivalent of 45% of the teachers that were trained that year (UNESCO, 2005a:114). Conservative estimates for 2005 teacher mortality rates in Kenya, Tanzania and Zambia point to a loss of at the very least 600 teachers each to AIDS, and at least 300 in Mozambique. Less conservative estimates put the 2005 figures at between 1,100 and 3,000 teacher deaths as a result of AIDS in each of Kenya, Tanzania, Zambia and Mozambique (UNESCO, 2006a:87).

Despite these startling statistics, a recent review conducted by ActionAid International for the Global Campaign for Education, revealed that most of the countries researched didn't have any plans in place for coping with HIV & AIDS-related staffing crises. The review also reported that the UN's Global Readiness Survey found that only about 25% of high prevalence countries have plans to train more teachers to cope with increased staff losses as a result of the HIV & AIDS pandemic. Furthermore, only about 10% had reviewed or amended their human resource policies in order to deal with the challenge posed by HIV & AIDS. Only one out of 18 countries reviewed was monitoring attrition rates and using the information gathered to plan for the future teacher recruitment and training requirements (GCE/ActionAid, 2005b:4).

***Kenya***
'In Kenya, for example, the Ministry of Health has stated that HIV & AIDS has impaired the effectiveness of the education sector by increasing the rate of teachers' deaths and attrition over the past decade. According to the Teachers Service Commission, the reported number of teacher deaths rose from 450 in 1995 to 1,400 in 1999. Although data on causes of teacher mortality are not kept, the high increase is probably due to HIV & AIDS. A survey in four districts in Kenya found that in Kisumu, the district most affected by HIV & AIDS, the primary teacher attrition rate had risen from 1% in 1998 to around 5% in 1999 and had remained at that level since. At that rate, a quarter of the teaching force would disappear within five years. While it is difficult to say for certain how many deaths are AIDS-related, most are occurring in districts with high HIV prevalence rates, supporting the hypothesis that AIDS is a major cause of mortality. The retirement rate also increased, from less than 0.5% in 1998 to 2% in 2001. The hypothesis that some of the extra retirements were on medical grounds is quite plausible' (UNESCO, 2005a:112).

*AIDS-related teacher absenteeism*

Teacher absenteeism cannot be solely attributed to HIV & AIDS – especially in low prevalence countries. However, in high prevalence countries it has been reported to account for as much as 77% of absenteeism (UNESCO, 2006a:88). HIV & AIDS-related absenteeism itself has at least three dimensions. Teachers may need to take time off work to:

1. attend the funerals of friends or relatives
2. to care for sick relatives (where primary teachers are predominantly women, absenteeism necessitated by caring requirements may be intensified, as research has shown that the burden of care falls disproportionately on the shoulders of women)
3. because teachers themselves become ill.

'[T]he long, debilitating illness that generally precedes death from AIDS implies loss of teacher contact time, quality, continuity and experience' (UNESCO, 2005a:112). Unlike some other causes of absenteeism, time taken off work for any of the above reasons is completely legitimate and so should be factored into government planning. Anticipating and compensating for legitimate absenteeism would ensure that sufficient numbers of substitute teachers are available to cover for teachers whose work is affected by HIV & AIDS. This could also enable teachers to receive full pay if forced to work part time because of illness, or while on long-term sick leave or short-term compassionate leave so that students' learning outcomes are not negatively affected by teacher absence. As a minimum, governments should be looking to protect teachers by developing an HIV & AIDS workplace policy in order that these bouts of absenteeism, either for caring or for sickness, are formally recognised and respected.

***Tanzania***
'One teacher observed: "HIV/AIDS has created lots of problems for us. If a teacher is absent for a long time, her or his classes are allocated to other teachers and increasing their workload". Another reported: "We have more than 100 pupils in this school who are AIDS orphans. These children need not only financial support but also love and care. I try and do as much as possible, but it is not adequate'" (Education International, 2005c).

The financial impact on education systems can be dramatic. In this year's *Education For All Global Monitoring Report*, UNESCO stated that in Mozambique alone, AIDS-related teacher absenteeism for personal illnesses only (not to mention time off for attending funerals and caring for sick relatives) was likely to cost around US$3.3 million in 2005. These costs were primarily needed to pay for substitute or replacement teachers for teachers who fell ill – with an additional US$0.3 million for increased teacher training costs (UNESCO, 2006a:88). Governments in HIV & AIDS affected countries find it difficult to cover such additional costs, while their economies are also being decimated by AIDS-related deaths and absenteeism in other sectors, without additional external financing.

Many efforts are being made by teachers and their unions to address the pandemic. For example, the South African Democratic Teachers' Union (SADTU) has conducted a broad survey of HIV prevalence in the teaching community and produced a policy response to accompany their survey (Education International, 2006b:13). Education International and its affiliates are already working in conjunction with the World Health Organization in many countries on HIV & AIDS awareness and training. SADTU's work shows that there is also a role to play for teachers' unions in advocacy policy dialogue around government's response to HIV & AIDS.

### 3. Teacher migration and attrition

> *'African governments should address weak management, lack of incentives for individuals to get things right and poor motivation which are often more critical. So is the need to attract, motivate and retain skilled staff. A survey in Malawi showed that 25 per cent of teachers who started work in rural areas in January 1999 had left by October that same year' (Commission for Africa, 2005).*

In addition to population growth, drives for universal access and deaths and absenteeism associated with HIV & AIDS (and of course other illnesses), a cause of teacher shortages is migration and attrition. Attrition comprises resignations, retirements, dismissals, and deaths – there will naturally always be a combination of all of these in any profession. We have seen already that HIV & AIDS is having a significant effect on teacher mortality rates, requiring government

planning that factors in the need to replace teachers lost to AIDS. Other causes of deaths, retirements and dismissals are more constant, and plans will already be built into education systems to account for the need to replace teachers as they retire, for example. Resignations are more variable, and have more to do with what incentives teachers are offered to encourage them to stay in the profession. Teachers can resign for a number of reasons, which can be divided into 'push' and 'pull' factors. Push factors include poor working conditions, low salaries, long hours and heavy workloads. In general, the pull factors are the converse of the push factors: better working conditions, better pay, better hours and greater stability.

Research by both ActionAid International and the UK's Centre for Comparative Education Research and School of Economics has highlighted that large numbers of teachers in a number of countries are leaving state provided education for better paid jobs. Teachers leave for jobs that are outside the education sector entirely, within education but moving to the private sector, or within education but in rich countries in the North or in neighbouring countries paying better salaries (Sives et al, 2004:3–4; GCE/ActionAid, 2005a:21).

> *'The low salaries offered to teachers and health professionals have caused an exodus in Bangladesh, Ethiopia, Ghana and Nigeria. Due to a freeze on salary increments for all civil service employees since June 2002, Ethiopia is faced with a brain drain. In Nigeria, the lack of wages or secure employment is resulting in teachers leaving public schools to higher paid positions in private institutions' (GCE/ActionAid, 2005a:21).*

Where teachers are migrating in large numbers to other countries, the flow of trained teachers not only undermines poor country governments' efforts to supply their schools with enough teachers and reduce escalating pupil–teacher ratios, but it also allows richer countries to 'free ride on the investments in training made by developing countries' (Sives et al, 2004: 4).

Countries such as the US, Canada, the UK and France are popular destination countries for skilled migrants, especially where there is a high demand for teachers and nurses, and historical, colonial or language links between countries or possibilities for family reunification where earlier generations have migrated (VSO, 2005:12). In some cases, rich countries have been found to be actively recruiting teachers from countries such as Guyana, with offers of higher pay, better working conditions and quality of life.

> *'...it is not just the best teachers that are taken, but also the most experienced, who are also versed in management and administration duties. The loss of teachers is a vicious circle for countries drained of their resources. These are countries that have invested in teacher training, put public money into raising teaching standards, and at the end of the day, lose them as soon as they have built up the necessary experience' (Educational International, 2005a).*

***Guyana***

'"They come back every year, and every time they come, we lose dozens of teachers", complains Avril Crawford, President of the Guyana Teachers' Union (GTU). "They" are the British recruiters on their annual visit to Guyana to meet teachers who replied to their advertisements for applicants to teach in Britain. "Recruitment agencies from the United States and the Bahamas are now flocking in, too. Even Botswana looks for teachers here", exclaims Avril Crawford. The Bahamas and Bermuda are the Caribbean countries that headhunt most from their neighbours. Guyana is one of the few Latin American English-speaking country. Its teachers are highly trained, but working conditions are poor, making them more open to attractive offers from elsewhere. The highest monthly salary that a Guyanese teacher could earn is € 400, which even a novice teacher in the Bahamas would spurn' (Education International, 2005a).

***Jamaica***
'Jamaica is another stop on the recruitment agencies' itinerary. Byron Farquharson of the Jamaica Teachers Association (JTA) estimates that 300 teachers leave the country each year. "300 out of the 23,000 teachers in Jamaica might not seem much, but it is", stresses Byron, because "the teachers recruited are in fields where Jamaica has a shortage: maths and science... Industrialised and developing countries face the same shortage", notes Byron, "except that the industrialised countries have a way out: take our teachers!"' (Education International, 2005a).

The *Commonwealth Teacher Recruitment Protocol*, which was agreed by Commonwealth Ministers of Education in 2004, attempts to tackle the problem of rich countries actively 'poaching' teachers. However, it also points out that there needs to be a balance between '...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'. Although it may be too early to judge what impact the protocol is having, the systems put in place for its implementation seem to be promising. The protocol covers all Commonwealth countries, which means that it protects a vast number of teachers. Nevertheless, there is a clear need for expansion of the protocol to countries not in the Commonwealth (VSO, 2005:12).

A protocol to protect the rights of migrant teachers and limit the damage to education systems as a result of active recruitment by rich countries is only part of the answer. A more complete solution would evidently involve improving teachers' working conditions, salaries and other incentives, to make teaching in the government system in their home countries a more attractive option.[14]

### 4. Fragile states and countries affected by conflict and natural disaster

> *'Teachers are the targets of murder, threats and displacement in Colombia, where eighty-three teachers were killed in 2003... Fear of abduction, rape, landmines and crossfire makes travel to school treacherous [for both teachers and students] and parents reluctant to let children go to school during conflicts' (UNESCO, 2006:97).*

This report from UNESCO echoes similar accounts from many other countries affected by conflict. Teachers are frequent targets in fragile states and countries affected by conflict, where repressive regimes often regard education either as a threat to their power or as a tool for indoctrination. Schools are a double-edged sword by their very nature as places that help to restore normality or as 'an organ of destruction'(Obura, 2003:29). In many countries affected by conflict, such as Rwanda, Somalia, Angola and south Sudan, 'schools were bombed, burned and looted, school materials and equipment were stolen or destroyed...'(ibid). It is not surprising, therefore, that in these instances teachers are in short supply. In addition, the low, and in some cases non-existent, salaries of teachers in many conflict situations has resulted in teachers defecting to other higher-paying professions.

***Sudan***
A Sudanese official at the county education level in southern Sudan explained this situation and the involvement of international agencies in this trend:

'Teaching in southern Sudan has become a waiting place. It's not a profession. Teachers just teach when they have nothing else to do. But when an opportunity comes, they leave. Actually, the most qualified teachers change their profession. They go and work with NGOs. As soon as they get an opportunity, they shift' (Sommers, 2005:258).

This example is illustrative not only of the situation in conflict or post-conflict scenarios, but also of many other poor countries suffering severe teacher shortages, as noted earlier. The issue of teacher

14 Improving conditions and incentives will be examined in more detail in chapter 4.

attrition due to poor conditions and low salaries is reflected in the regular and heated debates within international agencies working in emergencies about teacher salaries and 'incentives'. Paying teachers is expensive and some donors are reluctant to fund the high recurrent costs of teacher salaries. However, this is the only way to retain good quality teachers in situations where educated people are in high demand. 'A central finding of this research is that not paying teachers has a direct and negative impact on educational quality' (Sommers, 2005: 259).

In emergency situations, education is seen as one of the key factors in providing normality and stability, therefore the provision of good quality teachers is a critical issue. In countries affected by conflict, there are particular reasons for teacher shortages, which the Commonwealth Secretariat summarises. These illustrate how emergencies can affect teacher supply and create teacher shortage by:

- violent death and injury to teachers
- teachers fleeing abroad and taking up employment there
- teachers leaving the profession because they have not been paid for long periods or because their schools have closed
- temporary suspension of teacher training resulting in failure to replace teachers who have retired, resigned or died.

Unfortunately, at the very time when teacher supply is low, the demand for teachers is likely to be at a peak (Commonwealth Secretariat, 2006: 27–8).

### *Gender, disability and ethnicity-related dimensions of teacher shortages*

*Gender*

Female teachers can be extremely important in making schools more girl and boy friendly (GCE, 2003:26), especially for improving girls' enrolment, retention and achievement. According to UNESCO, 'girls' enrolment rises relative to boys' as the proportion of female teachers rises from low levels' (UNESCO, 2003/4:60). This positive correlation between female teachers and girls' enrolment is often particularly strong in countries where girls' enrolment is relatively low and cultural practices discourage girls from going to school.

Although in some countries, the percentage of women teachers is disproportionately high, creating different problems for boys (UNESCO, 2006a:361–7), in the regions with the greatest gender disparities, and lowest enrolments of girls, and in countries furthest from achieving universal access, female teachers continue to be a minority (Beyond Access, 2005c:6).

| Countries with a shortage of female primary teachers | % of female teachers | Countries with a shortage of male primary teachers | % of female teachers |
|---|---|---|---|
| Chad | 11% | Sri Lanka | 79% |
| Togo | 12% | Botswana | 80% |
| Benin | 19% | Guyana | 85% |
| Guinea Bissau | 20% | Philippines | 87% |
| Afghanistan | 24% | Mongolia | 93% |
| Nepal | 29% | Kyrgyzstan | 97% |
| Pakistan | 36% | Kazakhstan | 98% |

(UNESCO, 2006a).

Worryingly, between 1990 and 2000, the number of female teachers decreased in a number of countries where the percentages of female teachers were already extremely low: for example Benin, Burkina Faso, the Central African Republic, Djibouti and Togo (UNESCO, 2003/4:6). The proportion of women teachers is lowest in South and West Asia and in sub-Saharan Africa. In 16 sub-Saharan African countries, women hold only one-third or less of teaching posts (UNESCO 2003/4:7), and in Benin and Chad, less than one-fifth of primary teachers are women.

There are also often marked regional variations in the numbers of female teachers within countries, with the proportion of women in rural schools often being particularly low. And the proportion of female teachers tends to get lower as the level of education gets higher, with fewer teachers at secondary and tertiary levels of education. In countries including Benin, Burkina Faso, the Comoros, the Congo, Eritrea and Senegal, less than 15% of all secondary teachers are women (UNESCO, 2006a:91). However, the presence of female teachers at secondary as well as primary level can be critical to allowing girls to progress through their education.

Female teachers act as positive role models for girls: they can help encourage parents to enrol their daughters in school (in some countries parents feel it is safer leaving their daughters in the care of female teachers, or at least where there is a balance of female and male teachers). Female teachers can also motivate girls to complete their education and are less likely to discriminate against girls in classroom interactions. Yet in Mozambique, for example, there are some districts with no female teachers employed at all. In both Tanzania and Nepal, male teachers make up the majority in most regions and are often better qualified than the female teachers (Nilsson, 2003a:19; Shrestha, 2005).

> *'It is important for schools to undermine, not underscore, stereotypes and unequal treatment of women—and to be wary of giving boys more resources, leadership, and attention. Female teachers are good role models for boys and girls, and even young women can be effective teachers with training, support, and a programmed curriculum. Governments might consider setting national goals for hiring women and being flexible with age and education requirements for female teachers (while still providing adequate in-service training)' (World Bank, 2006:138).*

There is therefore clearly a need in many countries to recruit more female teachers, as well as more women in other positions in the educational system. Some countries have quotas for the recruitment of female teachers or scholarships for girls to enable them to complete their secondary education and minimum teaching qualifications.

***Bangladesh***
'The use of scholarships is another strategy to increase the number of female teachers. First, more girls need to complete secondary school. Bangladesh has used tuition fee exemption for girls attending secondary school as a way to encourage girls' higher education' (Nilsson, 2003b:25).

***Nepal***
In Nepal, girls receive scholarships if they attend secondary schools on the condition that they agree to serve as teachers in the relevant area for a certain period of time after graduation. This encourages girls from disadvantaged communities to become teachers in their own communities' (Nilsson, 2003b:25).

However, many teaching positions reserved for women remain unfilled – especially in rural areas. This is primarily because many governments have failed to develop effective incentive systems to encourage female teachers to work in rural or disadvantaged urban areas. Corruption and discrimination also mean that access for young women to teacher training colleges remains a major issue (GCE 2003:26).

It is clear that while ambitious targets for recruiting female teachers must be established in national education and gender strategies, quotas and scholarships alone may not be enough, and multiple strategies will be needed to ensure that targets are reached. In many countries, support and encouragement are essential to enable women to break with powerful social norms and adopt a teaching career (UNESCO, 2003:22).

*Disability*

Teachers play a crucial role in modelling inclusive attitudes and establishing expectations in the classroom. As such, disabled teachers – as well as able bodied teachers that are sensitised to disability issues – can be instrumental in combating discrimination and promoting positive identities in disabled children, and in breaking down prejudices of non-disabled children. Disabled teachers in particular can provide positive examples for parents of disabled children, who may feel that there is little point in sending their disabled child to school, because of the stigma and discrimination related to disability.

Statistics on both the numbers of teachers being trained in inclusive practices and child-centred pedagogy, and the numbers of disabled teachers in developing countries, are very hard to obtain. In the absence of these statistics, we can only infer the current situation based on the evidence available.

We can assume that the number of disabled people who are teachers is very low, given the body of evidence that suggests that disabled people are more likely than non-disabled people to experience disadvantage, exclusion and discrimination in the labour market (ILO, 2004). In Cambodia, for example, the current Ministry of Education practice is to exclude disabled people from training to be teachers, and to remove teachers who become disabled from active classroom teaching to administrative roles (Thomas, 2005). Moreover, the lack of educational opportunities available to disabled children means that there is a very limited pool of disabled men and women who meet the minimum qualification standards to enable them to apply to train as teachers, even where legislation and opportunities allow them to. Particularly for deaf children, teachers able to use natural sign language are essential. Encouraging deaf people to become teachers, and other teachers with deaf children in their classes to learn sign language, should therefore be a high priority for governments whose duty it is to provide a quality education to all children – including deaf children.

Indeed, more broadly, it is clear that all countries should ensure that discrimination against disabled people in the teaching profession is effectively prohibited and legislated against. Governments should also put in place systems, procedures and strategies to enable them actively to recruit, train and retain disabled people as teachers.

*Ethnicity*

In many countries, ethnic minority groups live in the remotest and poorest areas, which tend to be the areas worst served by education systems. There are fewer schools and teachers due to resourcing and recruitment problems, and children face long distances between home and school. Perhaps the biggest barrier to education for children from ethnic minorities is that they may not understand the language used as the medium of instruction. This is because government policies either actively or passively promote the national language in schools, and because not enough people who speak ethnic minority languages are able to become teachers – often because members of ethnic minority communities have limited access to education in the first place. Inflexibly designed curricula, which have no link to the lives of ethnic minority children, can also make education appear irrelevant to ethnic minority parents and communities.

One such example is Laos. Until recently, government and donors focused on quantitative expansion of qualified teachers and schools. Except for some provision of scholarships to encourage ethnic minority adults to become teachers, there were limited efforts to target more disadvantaged areas, with many donors favouring only large settlements for construction grants. Therefore, while some degree of schooling is now in the reach of many more children, improvements have reached the urban and 'better off' areas first and disproportionately. Meanwhile, the poorest and most remote places have been the last to be served. Up to 70% of teachers in mountainous districts are unqualified and have particularly low levels of education. Overall, 80% of teachers are from the majority Lao ethnic group, but for almost 40% of children, the language of the school is not the language of home. The curriculum too, is focused on urban and ethnic Lao children, and does not cater to the needs and aspirations of ethnic minority

communities (Seel, 2003). There is a clear pattern of high dropout and repetition rates in areas where the language of instruction cannot be understood by the children. In such a situation – where children can't understand teachers and teachers can't understand children, little learning is possible.

Similarly, in Bangladesh, the dropout rate for ethnic minority children in the Chittagong Hill Tracts is again much higher than the estimated national rate, with more than 60% of children dropping out, especially in the early years (Asian Development Bank, 2001). Not having teachers who speak a child's first language in early grades contributes to the high dropout rate of indigenous children from primary school. In schools such as these that are attended primarily by children from indigenous minority groups, the majority of teachers speak the dominant Bangla language only. No training is provided for the teaching of or through indigenous languages, as indigenous languages are not officially recognised by the government. Ethnic minority children in Bangladesh consulted by Save the Children felt that they do not have access to primary education because teachers and school administrators deny them admission as they often do not speak fluent Bangla (Save the Children, 2005).

Ethnic minority girls suffer particularly from lack of access to education in their mother tongue. Studies in Africa and Latin America have shown that girls who learn in familiar languages 'stay in school longer, do better on achievement tests, and repeat grades less often than girls who do not get home language instruction' (UNESCO, 2005e).

There is clearly a need for both the recruitment of teachers from ethnic minority communities to teach in schools that serve those communities, as well as a revision of policies that impose a national language on children who speak a different language at home.

> *'To expand access for ethnic groups, teachers or teacher aides from the target ethnic group are particularly helpful in their ability to connect with the students as powerful role models. Bilingual schools have also been effective. In Mali, bilingual programs were associated with large declines in dropout and repetition, and rural students outscored urban children' (World Bank, 2006:138).*

Recruiting and supporting more ethnic minority teachers will ensure that there are sufficient numbers of teachers who are able to teach in local languages, provide education that is relevant to local realities and act as role models for ethnic minority children to progress through the education system. To make this possible, it may be necessary to make teacher training entry requirements more flexible to compensate for the low level of education among ethnic minority applicants. At the same time, such trainees should receive the extra support they need during pre-service and in-service training to enable them to meet the minimum standards required to teach and deliver the same quality of education as other teachers. It may also be necessary to decentralise control of teacher recruitment, training and posting in order to develop teacher training curricula in all the different languages spoken, and provide schools with teachers who can speak the same language as the children and communities they serve– as has been recommended by the World Bank:

> *'A further challenge is that where there are many languages, formerly centralized approaches to teacher development and deployment will need to be modified. To address this challenge, countries can decentralize the recruitment of teacher candidates and pre- and in-service teacher training can also be managed regionally rather than centrally' (World Bank, 2005:3).*

Mother tongue medium of instruction is especially important for first generation learners and for all children in early grades. Bilingual education, in which children are first taught in their mother tongue and later taught the national or regional language as a second language, which only later still (for example, in secondary schools) is used as the medium of instruction, is evidently an urgent priority in countries with linguistic minorities (or majorities). Indeed, learning the national or regional language may well be an expressed aspiration of ethnic minority communities, as it can enable them to participate in, for example, local and national elections or to access social and health services. Pressure from education coalitions and teachers' unions may be needed in some

cases – where medium of instruction policies are being used to reinforce or maintain the dominance of the ruling ethnic group, or even to suppress separatist movements among linguistic minorities – in order to make the delivery of education more equitable and effective.

***Summary of recommendations on teacher shortage and supply***

- The MDGs will not be achieved without universal access to quality basic services provided by strong public systems. This will require a massive investment by poor country governments and donors in rebuilding the public sector, including investing in recruitment, training and salaries for 14–22.5 million extra teachers (as well as millions of health workers and other public sector workers), and an end to user fees (Oxfam, 2005:1).

- Governments and donors must work together to reduce pupil–teacher ratios to 40:1 (which should be seen as a maximum in all regions of a country, not an average, nor a target to which pupil–teacher ratios should be raised). Classes with high proportions of first generation learners should be smaller than 40:1 to allow teachers to give such children the extra attention they need – especially where children speak a different language to their teachers. Double and triple shifting should be avoided unless different teachers are used for different shifts.

- Lower secondary education should be expanded to at least 35% enrolment, to ensure adequate numbers of potential teacher trainees.

- Governments must put in place adequate monitoring systems for measuring the impact of the HIV & AIDS pandemic on education. This should include gender disaggregated data. In particular, education management information systems (EMIS) need to be strengthened in order to capture data on teacher absenteeism and mortality as a result of AIDS. As a minimum, governments should protect teachers by developing an HIV & AIDS workplace policy in order that bouts of absenteeism, either for caring or for sickness, are formally recognised and respected.

- Women and members of marginalised groups (such as disabled people, members of ethnic minorities and people living with or affected by HIV & AIDS) should be actively encouraged to enter the teaching profession, through positive discrimination in the form of quotas, scholarships, and lower entry requirements. These should be combined with specific additional support and training to help them attain the national minimum qualifications required to teach.

- Bilingual education should be an urgent priority in countries with linguistic minorities (or majorities). Teachers (of whatever ethnicity) should be trained and equipped to teach primary school children in their mother tongue.

- Donor countries must guard against deliberately recruiting teachers from poor countries that can ill afford to lose them, while teachers' rights to migrate should be protected. To that end, the 2004 *Commonwealth Teacher Recruitment Protocol* should be expanded to cover non-Commonwealth countries.

## 3. A GOOD TEACHER IS A TRAINED TEACHER

> *'More than 20% of primary school teachers lack training in more than half the countries in sub-Saharan Africa, and more than 30% in half the countries of South and West Asia. In South Asia, despite the rather low minimum qualifications in several countries, many teachers have not met the national minimum requirements' (UNESCO, 2006a: 89).*

It is evident that for the teacher shortage crisis to be solved without sacrificing the quality of education, urgent action needs to be taken not just to recruit teachers, but also to train them well and retain them with the right incentives. All three ingredients are vital. If teachers are not well trained, they cannot deliver quality education; if teachers are not well managed and don't get the right incentives[15] to stay in their jobs, it is children who will lose their teachers to the private sector, other professions and other countries, and governments who will lose the investment that they made in the teachers' training. Countries that have no teacher shortage often suffer from high proportions of untrained and unmotivated teachers – a situation that affects the quality of education that teachers are able to deliver almost as much as teacher shortages. This chapter examines how governments should undertake the task of training the new teachers they need as well as upgrading the training of under-qualified teachers already in service, and how donors can help them.

### *Low levels of training*

Currently, levels of training within the teaching workforce of poor countries are such that only 25% of countries surveyed in UNESCO's 2006 *Education For All Global Monitoring Report* are able to report that all or most of their primary teachers have received pedagogical training (GCE, 2005:3). In a 2003 survey of Education For All plans from six sub-Saharan African countries, Education International found that all countries in the survey were struggling to deliver quality education with extremely high proportions of untrained teachers. Even those countries that had improved the qualifications of their teaching forces through extensive in-service training during the 1990s, maintained high numbers of unqualified teachers. While population growth and drives for universal access have dramatically increased enrolments, pre-service teacher training colleges appear to have been unable to the replace unqualified teachers with qualified ones. Lack of planning, in the countries surveyed, led to a shortfall of human and financial resources in training colleges, leaving them unable to meet the increased demand for trained teachers (Nilsson, 2003a:18).

Yet study after study has identified the quality of teaching as a major influence on student learning and achievement. How teachers are trained for teaching has been identified by UNESCO as a critical indicator of education quality. Teachers need to be equipped with subject-specific expertise, knowledge of, as well as the ability to use, different teaching methodologies effectively, an understanding of information technology, and the ability to work collaboratively with other teachers, parents and other members of the community. Teachers also need to be equipped with the right attitudes to enable them to welcome all children to their classrooms, whatever their status, in order to avoid the perpetuation of existing exclusions (Motivans, 2002:1; UNESCO, 2005a:108).

Lack of training severely affects teacher morale and motivation. Yet far too regularly, teachers are 'thrown in at the deep end' with little or no pre-service training, in-service training or support structures. The problem of inadequate training is exacerbated by the common use of multi-grade teaching and/or double or triple shifting in poor countries. Even where there are teacher training programmes of reasonable length, they rarely teach trainees the skills they need to cope with the extra demands of this type of teaching (Bennell, 2004:iv).

15 Incentives are the focus of the next chapter on teacher morale, motivation and status.

***The Maldives***

'"In my first month of teaching there have been so many difficult things; not knowing how to write a lesson plan, learning how to use the textbooks, students not behaving – shouting and throwing things; this makes me sad, sometimes I have to repeat the lesson" Untrained Primary Teacher' (Wheatcroft, 2005:19).

These trends add up to create a worrying global picture that results in many children being pushed out of school by the poor quality of teaching. Those that do manage to complete their schooling, graduate with very low levels of learning attainment (GCE, 2005:3).

In some countries, where there are demands to recruit new teachers quickly – because of increasing enrolments, the impact of HIV & AIDS or higher than usual migration and attrition – the duration of pre-service training is being reduced and the sequencing of practical and academic training is being altered (UNESCO, 2005a:108). Education International's survey revealed that some countries' governments have found a solution to tackle the problem of getting large numbers of teachers into schools quickly, without sacrificing the quality of education they deliver in the long term. The solution has been to drastically reduce the length of pre-service training, but simultaneously improve the quality and quantity of in-service training in order to convert unqualified teachers into qualified teachers in as short a time as is feasible (Nilsson, 2003a:18).

It is widely reported in the literature, however, that a significant number of countries have abandoned their commitment to both quality pre-service training *and* quality in-service training:

> '*Many countries have made pledges to compensate the lack of pre-service training by setting up in-service training programmes, but there is no evidence yet that this promise is actually being implemented*' *(Education International, 2006b:11).*

Countries, including Anguilla, Belize, Cambodia, the Congo, Ghana, India, Mali, Nicaragua, Niger, Nepal, Pakistan and Senegal (UNESCO, 2006a: 89; Duthilleul, 2004), are instead choosing to employ what are known as 'para-teachers'.

**Para-teachers: cutting costs, cutting quality**

> '*The education system in West Africa is increasingly the domain of 'para-teachers', with pre-service training of only a few months or even weeks. This is a direct attack on the quality education which all aspire and are entitled to*' *(Education International, 2006c:2-3).*
>
> '*With the teacher crisis, quality has often been a hostage of quantity. The trend is to recruit as many teachers as possible, even if they do not have the necessary qualifications in order to respond to expanding enrolment*' *(UNESCO, 2005b:6).*

'Para teacher'[16] schemes are large expansion programmes where pre-service training is compressed or abandoned completely, wages are lowered, working conditions are poorer and career paths are limited. They are being used by many governments to cut the costs associated with expanding educational access to all children. The price such governments are forced to pay is the quality of training. This massive recruitment is often accompanied by the mandatory early retirement of more experienced, and often more expensive, teachers in order to cut costs even further.

Such short-term measures have been the option of last resort for governments struggling with underfinanced education budgets. Given the funding promised repeatedly by donors at the 2000 Education For All conference in Dakar, all governments would no doubt choose to employ a fully trained cadre of teachers. However, schemes that were originally intended as short-term emergency measures are morphing into long-term plans, gradually replacing all the qualified teachers with unqualified para-teachers who, through no fault of their own, are unable to deliver

16 'Para-teachers' are sometimes referred to as volunteer teachers or contract teachers.

lessons or control classes. As a result, parallel systems for teacher training have developed in these countries. On the one hand, there is formal teacher education that educates teachers in accordance with the minimum required qualifications to teach. On the other hand, parallel to that, para-teachers are recruited and receive only a short in-service training or a brief orientation of the profession (Nilsson, 2003a:24).

ActionAid International's recent survey *Contradicting Commitments How the Achievement of Education For All is Being Undermined by the International Monetary Fund* highlights the important point that the countries that are hiring para-teachers are the ones that can least afford it:

> '*They have large numbers of out-of-school children, high pupil–teacher ratios, poor quality of learning, and limited resources. However, in light of severe budget shortages and constraints, they have little choice but to cut costs by offering short-term contracts at reduced salaries to individuals who lack proper training or experience. Not only are contract teachers becoming more of the norm but the policy itself is being advocated by the World Bank and by the IMF in its loan conditions as a way of keeping recurrent expenditures at sustainable levels*' *(GCE/ActionAid, 2005a:23).*

The World Bank has clearly been instrumental in this trend, as will be discussed in more detail in chapter 5.

Although attempting to do the same work as their colleagues, most of the time it is clear that para-teachers don't have many options to improve their conditions of service. Although their number is increasing, they often don't have the right to collective bargaining. In some countries in West Africa, the professionals now represent less than 30% of the teaching population. After a transitional period of a few years, the teachers' unions, especially in Africa, are trying to cope with the situation by including issues related to para-teachers in discussions with the government. But the tendency is for further splintering of unions with para-teachers organising themselves in associations rather than unions. The result is that the employment of para-teachers undermines the bargaining power of unions so they can no longer negotiate liveable wages, fair contracts and decent working conditions.

Overall, this situation creates inequality in the delivery of education, causing a decline in the quality of education in the areas where para-teachers are employed, thereby negatively affecting the rights of children in those areas. In the same country, in the same education system, children have access to different qualities of education based on the area they live in or the schools their parents can afford. Often, para-teachers are employed in areas of a country where it has been difficult to recruit or retain teachers – usually rural areas or areas populated by the most disadvantaged communities. The use of long-term para-teacher schemes, therefore, does not help countries achieve quality education. Instead, they only help to replicate educational and wider societal inequalities (GCE/ActionAid, 2005a:23).

***Niger***

'In the Niger, the proportion of trained primary teachers fell from 97% to 72% between 1999 and 2002 as a direct result of a government policy to meet increased demand for primary education and keep costs sustainable by hiring large numbers of volunteer teachers without pre-service training, at substantially lower salaries than other teachers, and then providing them with in-service training to upgrade their qualifications' (UNESCO, 2006a: 89).

'The vast majority of new teachers are now hired on a "voluntary" basis, [causing] teachers' unions [to] express outrage over the segmentation between civil servants and volunteers. The long-term sustainability of a policy maintaining two groups of teachers with blatantly unequal status is questionable. Senegalese experience suggests that the eventual absorption of "volunteer" teachers within the civil service may be difficult to avoid. The policy challenge that governments face is how to support "volunteer"' teachers while ensuring that the conditions of service of regular teachers are not undermined and that para teachers are not exploited' (UNESCO, 2005a:167–8).

***Cameroon***

'...there is no lack of qualified teachers in Cameroon. After the reopening, in 1995/96, of the teacher-training "écoles normales", which had been closed down six years earlier under the structural adjustment programmes, some 20,000 new teachers qualified. However, only 1,700 of these were employed as public workers. Approximately 14,000 were subsequently employed, starting in 1997/98, as temporary teachers with a monthly salary of 56,400 CFA francs [€86], which is paid 10 months a year. All the others (over 4,000) are unemployed. When the teachers were recruited on a temporary basis, they were promised that they would be given civil servant status after four years' employment – a long-unfulfilled promise in the case of the first batch of recruits, most of whom, moreover, are owed between 10 and 40 months' salary arrears. Driven by these grievances, teachers regularly stage work stoppages, demonstrations and sit-ins outside public buildings in an attempt to make the authorities keep their promises' (Education International, 2006a).

***India***[17]

'India has witnessed a phenomenal rise in the number of para-teachers from primary to senior secondary schools...more than 220,000 para-teachers were engaged in full time/regular schools during the period from 1994–1999, the present count is likely to be substantially higher. Unofficial estimates put it in excess of 500,000. Recruitment procedures and service conditions of these teachers vary considerably across the states, as does the underlying stated rationale. In some states, such schemes were seen as interim or exceptional measures, whereas in others they are part of a long-term policy. Gradually, the exception appears to have become the "norm" all over the country. Often such a move is justified in financial terms as for one regular teacher's salary, 3 to 5 para-teachers can be appointed. However, there are now a large number of field-studies that suggest that such schemes have little merit. As well as creating "dualism" within the public provisioning, the damage to educational quality has been huge' (GCE/ActionAid, 2005a:24).

However, with increased funding, it has been proven possible to increase the proportion of trained teachers without lowering the length and quality of their pre-service training. Rwanda increased its percentage of trained teachers from 49% to 81% by reorganising existing teacher training colleges and opening new colleges, and by subsidising two church-based training colleges that together produce around 1,500 new primary teachers per year[18] (UNESCO, 2006a: 90). With the promised assistance from donors, it *is* possible to recruit, train and retain suitably trained and motivated teachers, without having to resort to large-scale para-teacher programmes. Even where governments[19] are responding to teacher shortages caused by increased enrolments, HIV & AIDS, migration and attrition, conflict or natural disasters, para-teacher programmes are not viable as a long-term solution and should be phased out as soon as is feasible. At the very least – if the EFA goal of quality education for all is to be achieved – all para-teacher programmes should be phased out within five years and replaced by teacher recruitment, training and incentives programmes that will deliver good quality teachers and good quality education.

17 Long-term under-investment in Indian education can be traced to World Bank advice given in the 1980s, which encouraged the Indian government to work towards '...decentralising the management of public education and encouraging community- and private-supported institutions' (Shotton, 1998: 170).

18 It should be noted, however, that despite improving the training levels of their teachers, the Rwandan EFA plans remain constricted by a financing gap that has yet to be plugged by donors. The size and morale of the teaching force in Rwanda is still a major concern, as teachers struggle with class sizes averaging 60 pupils per teachers, pitifully low salaries and exhausting double shifting (VSO Rwanda, 2006).

19 In fragile states or in countries experiencing state collapse, there may of course be no government or no effective government that is responding to the need for professionally trained teachers and quality education. Para professional teachers are being used as a short-term measure by international agencies that are providing education services in the absence of government provision. In the longer term, the capacity of governments in fragile states needs to be developed to take over this role and develop appropriate teacher recruitment, training and incentive systems that will produce and retain an adequate supply of professionally trained and motivated teachers.

The principles set out in the 1966 ILO/UNESCO *Recommendation Concerning the Status of Teachers* remain unquestionably valid as a guide for governments that are responding to population growth and pressure for universal access, or shortages caused by HIV & AIDS, migration and attrition, conflict or natural disaster. The recommendation sets out how governments can increase access to education, by increasing teacher numbers, without sacrificing quality in the long term:

**1966 ILO/UNESCO *Recommendation Concerning the Status of Teachers***

'It should be a guiding principal that any severe supply problem [viz., teacher shortage] should be dealt with by measures which are recognized as exceptional, which do not detract from or endanger in any way professional standards already established or to be established and which minimize educational loss to pupils.

142. In developing countries, where supply considerations may necessitate short-term intensive emergency preparation programmes for teachers, a fully professional, extensive programme should be available in order to produce corps of professionally prepared teachers competent to guide and direct the educational enterprise.

143. (1) Students admitted to training in short-term, emergency programmes should be selected in terms of the standards applying to admission to the normal professional programme, or even higher ones, to ensure that they will be capable of subsequently completing the requirements of the full programme.
(2) Arrangements and special facilities, including extra study leave on full pay, should enable such students to complete their qualifications in service.

144. (1) As far as possible, unqualified personnel should be required to work under the close supervision and direction of professionally qualified teachers.
(2) As a condition of continued employment, such persons should be required to obtain or complete their qualifications' (ILO/UNESCO, 1966:13–14).

### *What is a trained teacher?*

If governments are going to fulfil their duty to provide children with their right to trained teachers, it would be helpful to examine here what the consensus is concerning what constitutes a trained teacher. UNESCO's current definition of a trained teacher doesn't set any global standard but rather defines a trained teacher as 'a teacher who has received the minimum training (pre-service or in-service) normally required for teaching at the relevant level in a given country' (UNESCO, 2006a:423). This reflects the fact that the number of years of schooling and academic training required to become a primary school teacher, differs enormously from country to country. It can range from eight or nine years in countries where the minimum standard is completion of lower secondary education (six years at primary level and two or three years at lower secondary level) to 16 years where the standard is upper secondary education and a tertiary degree (UNESCO, 2005a:109). The International Standard Classification of Education (ISCED) system illustrated in the box below, allows countries to compare their education systems by duration, entry requirements, and theoretical versus practical or technical content.

**The International Standard Classification of Education**

**ISCED 2:** Lower secondary: Typically between 8 and 9 years of schooling, 2 to 3 years after completing primary education.

**ISCED 3:** Upper secondary: Typically between 12 and 13 years of schooling, including completion of lower secondary for entry. ISCED 3A and 3B programmes are designed to prepare students for entry into tertiary programmes at the ISCED 5A and 5B level, respectively (see below).

**ISCED 4:** Post-secondary, non-tertiary. These programmes straddle the boundary between upper secondary and post-secondary education from an international point of view, even though they might clearly be considered as upper secondary or post-secondary programmes in a national context. They are often not significantly more advanced than programmes at ISCED 3 but they serve to broaden the knowledge of participants who have already completed a programme at level 3. The students are typically older than those in ISCED 3 programmes. ISCED 4 programmes typically have a full-time equivalent duration of between 6 months and 2 years.

**ISCED 5A** programmes are largely theoretically based and are intended to provide sufficient qualifications for gaining entry into advanced research programmes (e.g. to earn Ph.D.s) and professions with high skills requirements (e.g. medicine, law, architecture, engineering). Minimum duration is 3 years after completion of ISCED 3.

**ISCED 5B** programmes that are generally more practical/technical/occupationally specific than ISCED 5A programmes. Minimum duration is 2 years full-time education after completion of ISCED 3 (UIS, 2006).

The lack of a global standard allows countries to define even students with little more than primary schooling as 'trained teachers' (as in the example from Mozambique below). It should be noted that in many cases, the percentage of trained teachers reflects the changes that may have occurred in the minimum standards required to teach. Where governments have changed the standard from one ISCED level to a higher level, teachers that went through teacher training five, ten or twenty years ago when the type of training was set at a lower ISCED level, suddenly no longer meet the national minimum standards, and become classified as 'untrained' according to that country's new standards. A country's percentage of 'trained' teachers consequently changes overnight. Conversely, if the ISCED level used is lowered suddenly thousands more teachers classify as 'trained' teachers.

Often, it seems as if the definition of what constitutes a trained teacher is deliberately altered for public relations reasons: to affect the national percentage of trained teachers as represented in global statistical records such as UNESCO's *Education For All Global Monitoring Report*, or for use in national political and media debates. Such different standards of what constitutes a trained teacher make international comparisons of levels of trained teachers close to meaningless, as is plainly illustrated in the following examples:

***Nepal***
Only 15% of primary, 27% of lower secondary and 40% of upper secondary teachers are fully trained. Some of these teachers have only completed short-term training courses. In the past, the government would consider trained teachers to be everyone who has had at least one month of training. However, following a new education policy, trained teachers now refer to those teachers who have received pre-service training of no less than ten months duration. As a result, there has been a tremendous drop in the percentage of 'trained' teachers, from 52% to 15%, reflecting the lengthening of training (Shrestha, 2005: 16; UNESCO, 2006a:89).

***Mozambique***
By contrast, in Mozambique, the minimum primary teacher training entry requirement has been lowered from nine to seven years of schooling, while the pre-service teacher training programme has been simultaneously shortened. This has resulted in the percentage of 'trained' teachers rising from 33% to 60% (UNESCO, 2006a:89).

Although UNESCO doesn't take a position on what length teachers' education should be or what combination of secondary and post-secondary education qualifications teachers should have in order to be described as 'trained', it is clear that the more training teachers get, the better. A teacher who has completed upper secondary school and two years of teacher specific training will be much better equipped to teach than a teacher with only a primary education and a one-month

long pre-service induction. Rich countries, and the international financial institutions that advise poor country governments on the length of teacher training and that provide financing based on their own advice, should bear in mind the standards in their own countries before advising much lower, and therefore cheaper, standards for teachers in poor countries. Ultimately, when teachers are not adequately trained, children are denied their right to a quality education.

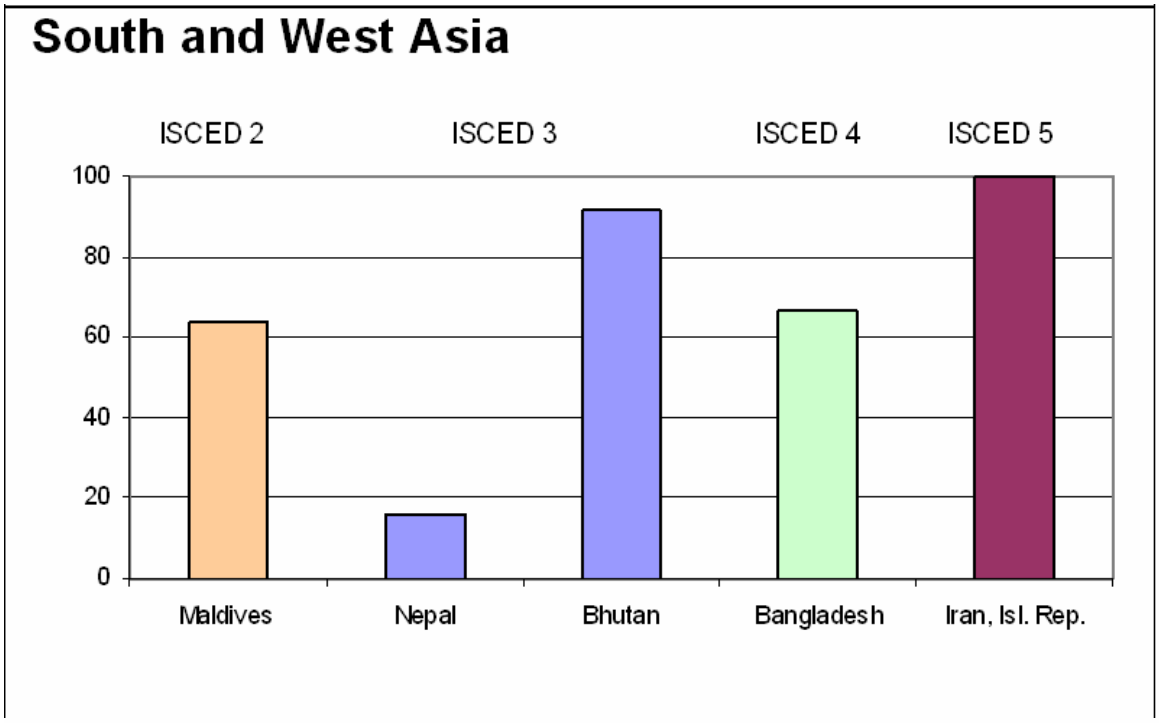
Even where the minimum standards required to teach are set at a reasonable length, statistics from UNESCO's 2005 *Education For All Global Monitoring Report* gives examples of just how few new primary teachers reach their own countries' minimum standards in some sub-Saharan African countries. Togo struggles the most, with a staggering 98% of teachers in their first year of experience who have not yet met the minimum training standards that are (clearly only nominally) required to teach:

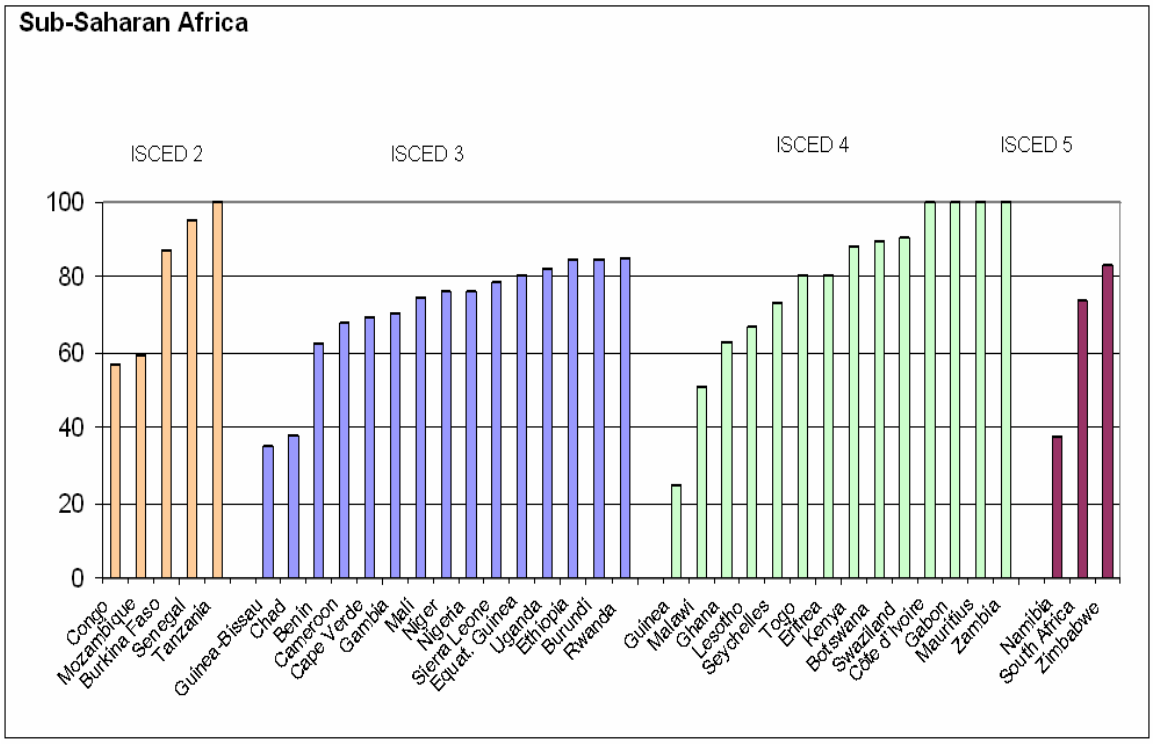
| Country | % of primary teachers meeting minimum national training standards in their first year of teaching | Nature of minimum training standards |
|---|---|---|
| The Gambia | 30% | Post-secondary non-tertiary course |
| Chad | 19% | Upper secondary qualification |
| Guinea-Bissau | 15% | Lower secondary qualification |
| Cameroon | 15% | Lower secondary qualification |
| Lesotho | 11% | Upper secondary qualification |
| Botswana | 10% | Upper secondary qualification |
| Togo | 2% | Lower secondary qualification |

(UNESCO, 2005a:109).

UNESCO Institute for Statistics have also produced graphs that illustrate very clearly the wide variation not just in the level of minimum standards required to teach but in the number of teachers who don't meet those standards but are still expected to teach. When student learning outcomes and qualifications don't meet parents' and governments' expectations, more often than not, it is teachers that get the blame – not the teacher training system that sets their training levels too low, and then doesn't succeed in training all teachers to meet even those low standards.

**Minimum standards for primary teaching and percentages of primary teachers who meet these standards in South and West Asia and sub-Saharan Africa, 2002–2004:**




(UIS, 2006).

As well as the length of training, the content of pre- and in- service teacher training is vital. Teacher training should combine methodological and subject knowledge with school-based teaching practice. Once again, the ILO/UNESCO *Recommendation Concerning the Status of Teachers* provides a guide to what minimum standards should apply in terms of the content of teacher training. More recent research reported in UNESCO's 2005 *Education For All Global Monitoring*

*Report*, adds more detail concerning the needs of students of differing backgrounds. Members of the Global Campaign for Education would also add the need for training to include an understanding of exclusion and specific inclusive strategies and teaching methodologies designed to overcome the different needs of different children.

***The content of teacher training***

'Fundamentally, a teacher-preparation programme should include:

- general studies;
- study of the main elements of philosophy, psychology, sociology as applied to education, the theory and history of education, and of comparative education, experimental pedagogy, school administration and methods of teaching the various subjects;
- studies related to the student's intended field of teaching;
- practice in teaching and in conducting extra curricular activities under the guidance of fully qualified teachers' (ILO/UNESCO, 1966:5).

'...improved teacher education curriculum should [also] have the following aspects...

- It should equip trainees with the necessary language fluency and capability to serve the needs of the school to which they will be posted.
- Training material should be locally written and produced if externally produced materials are scarce or insufficiently relevant.
- The curriculum should challenge the trainee to reflect on his or her own practice. Learning to teach means acquiring not only knowledge and skills but also an understanding of learners and how they learn, along with repertoires of strategies for dealing with unique and ever changing circumstances.
- The curriculum must have the flexibility to take the trainee's prior experiences into account' (UNESCO, 2005a:162).

Teacher training should also:

- equip teachers with the skills needed to use inclusive, child-centred pedagogies and cater to the different needs of different children – be they girls, boys, children living with or affected by HIV & AIDS, disabled children or children from caste, ethnic or other minorities[20]
- support teachers to develop the skills and motivation to assess, monitor and respond to each child's needs and stage of development
- encourage teachers to promote gender, class and racial equality in their teaching.

Investment in learner-centred, inclusive in-service training should be an urgent priority for governments and donors, particularly as improving the practice of teachers already in school is the quickest way to improve children's educational experience.

### *The importance of in-service training and continuing professional development*

In some countries, training is primarily or exclusively delivered to teachers before they start their teaching career. However, practice-based in-service teacher training can make an enormous difference to the quality and inclusiveness of education, giving teachers the chance to put principles into practice. Many countries do not have widespread in-service teacher training systems, and those that do exist are often massively under-resourced. Yet newly qualified teachers tend to lose motivation within the first three years of their teaching career, due to a lack of management support and a lack of in-service training to enable them to translate their pre-service training and theory into practice.

> *'...ultimately, it is management in the classroom that transforms education resources into student learning... What teachers do matters more for student learning than any other single factor. Teachers must use class time effectively; they must make creative*

20 See also the section on gender, disability, ethnicity and HIV & AIDS-related dimensions of teacher training later in this chapter.

*use of learning materials; they must have the capacity to adapt their teaching practice to individual students' learning needs; and, above all, they must be motivated to devote time and hard work to proving that "every child can learn". In many developing countries, teachers' incentives, capacity, and practice are all greatly in need of strengthening. Specific policies to address these management issues at all levels of the education system must equally be core elements of a credible EFA plan' (Bruns et al, 2003:16).*

Ideally, therefore, pre-service training should be combined with a substantial programme of in-service training (to allow teachers to update their skills, subject specific knowledge and knowledge of new teaching methodologies) – in particular, the critical support required by newly qualified teachers in their first years of teaching – and with continuing professional development. Furthermore, pre-service teacher training colleges tend to be isolated from schools as well as from teacher training institutions responsible for the delivery of in-service training and the promotion of professional development opportunities (UNESCO, 2005a:161). Much needs to be done to synchronise more effectively the content of pre- and in-service training institutions. Newly qualified teachers and teachers close to retirement alike need to have regular training to enable them to learn and impart up-to-date subject knowledge. All teachers in a country also need to have access to the same range of up-to-date teaching methodologies and the confidence and ability to use them effectively, if children across a country, state or region are not to receive differing qualities of education.

In-service training should be considered a fundamental right for teachers, as it affects the rights of children to education of good quality. If the importance of in-service training is to be properly delivered, it cannot be left to teachers to organise it in their free time. In-service training should be organised during school holidays or when within term time, it should be organised to take place during working hours, and teachers should have their teaching hours reduced to allow them to attend the training. When teachers are required to attend in-service training at the same time as delivering their usual workload of lessons, the obvious risk is that they will not be able to do either very effectively (Fredriksson, 2004:13).

As well as in-service training, opportunities for continuing professional development are also crucial to teachers' ongoing learning and motivation, and should be integrated into and promoted by in-service training institutions. Professional development can include:

- study opportunities
- regular and supportive line management meetings and appraisals
- support, evaluation and assessment from in-service advisers and inspectors
- school exchanges
- peer consultation and experience sharing in subject themed, district or provincial level groups (UNESCO, 2005a:163).

Voluntary awareness-raising activities – such as HIV & AIDS awareness activities[21] with children or with parents, led by teachers' unions or NGOs – should be considered as part of teachers professional development, and their involvement in such activities during working hours should not lead to any loss of pay, pension or status.

In some countries, the costs of professional development through further study, for example, have to be borne by teachers – even where such study is required for them to reach the minimum qualification standards officially required to teach. When salaries are as low as they are, it is clear that the financial costs of further study – especially but not only when it is related to meeting minimum qualification standards – should be borne by the government and not by teachers themselves.

21 HIV&AIDS awareness should, however, also be part of the core curriculum, not solely a voluntary out of school hours activity.

It is vital, of course, that teachers and their union representatives should be consulted about the design, content and implementation of all pre- and in-service training and continuing professional development programmes, if they are to be effective. As the World Bank recognised in their 2004 *World Development Report*:

> *'When teachers are not consulted in training design—often the case—poor implementation is the result. Training may not be integrated into the system, as when teachers are trained in methods inconsistent with public examinations and so are reluctant to adopt them. Teachers often have little incentive besides professional pride to adopt new methods' (World Bank, 2004a:114).*

### *Gender, disability, ethnicity and HIV & AIDS-related dimensions of teacher training*

*Gender*

The gender dimensions of teacher training reflect the gender inequalities prevalent in wider society. Training opportunities, even where they are nominally available equally to both men and women, are often much more easily taken up by men than by women. For example, in Nepal, only 8% of female secondary teachers meet the minimum training standards compared to an average percentage of fully trained (male and female) secondary teachers of nearly 40% (Shrestha, 2005:16). This reflects the general trend in poor countries, which sees more women in early childhood care and education and in primary teaching positions, and more men in secondary and tertiary teaching positions. Such a situation points not only to unequal access to training and professional development opportunities, but also to gender bias in postings and promotion procedures.

The expansion of education systems to provide universal access to fee-free basic education provides an unprecedented opportunity to correct the gender imbalance that exists in countries that suffer from shortages of female teachers. The majority of countries that are furthest from achieving 100% net enrolment, also currently suffer from a shortage of female teachers. Those countries should introduce positive discrimination policies in the form of quotas for the percentage of female teachers that can be given places at teacher training colleges, in order to redress the gender balance.

In some countries, age and education requirements have been relaxed in order to hire enough female teachers. Yet it is vital that governments ensure that female teachers receive adequate – and empowering – initial and in-job training, to allow them to upgrade their qualifications in the longer term. In Ethiopia, quotas for ensuring that one-third of the intakes into teacher training institutes are female have helped produce an increase in the availability of female teachers.

> *'However, since women are accepted with lower qualification levels than men, their performance tends to continue to lag behind, which may badly affect their self-esteem. To address this, the Women's Affairs Office in the Ministry of Education has designed training programmes to give additional support to women in these colleges, at the same time as providing them with assertiveness training' (Beyond Access, 2005b:3–4).*

As well as enabling greater numbers of women to be trained as teachers, it is also important to ensure that the training received by both male and female teachers enables them to promote gender equality. In many classrooms, the behaviour of both female and male teachers may reproduce gender inequalities. Teachers and head teachers often assign chores such as fetching water, cleaning classrooms, and cooking to girls or to female teachers. Harassment of girls and female teachers by male teachers is also a serious issue in many countries and a major reason for girls dropping out of school (Beyond Access, 2005a:2). Some teachers have deep-seated beliefs that boys are naturally superior to girls, that they perform better than girls do, and that a woman or girl should not challenge male authority (Beyond Access 2005a:2). For example, research in Nigeria has shown that boys are given more opportunities to ask and answer questions, to use learning materials, and to lead groups; and that girls are given less time to talk than boys in science (Herz

and Sperling 2004:65). Such beliefs affect the ability for boys and girls to participate and learn as equals.

Despite this, teachers can – and many do – make a positive difference in school. They can challenge gender stereotypes and raise awareness of gender issues, protect children against sexual harassment and abuse, encourage girls to make non-traditional subject choices and ensure equitable participation in classroom activities for both boys and girls.

To do this, both men and women teachers require adequate support, and gender needs to be integrated into the core curriculum of teacher training. Such support must enable teachers to understand how their teaching practices can sustain gender inequalities and have severe consequences for girls' and boys' learning. It must go beyond 'gender sensitisation' to empower teachers to develop gender responsive teaching methodologies and practices. It needs to address not only how teachers teach gender equality, but also how they live this in their private lives, changing personal behaviour and challenging assumptions that perpetuate inequalities (Beyond Access 2005c:5).

*Disability*

Negative teacher attitudes towards disability can similarly create barriers to the education of disabled children. Such barriers can be created at the point of entry, if teachers refuse to teach disabled children, or in the classroom, as a result of teachers' perpetuating the wider societal prejudice, which teachers have been socialised into to the same extent as the rest of society. The result is that children are not able to integrate fully with their non-disabled classmates or fulfil their learning potential.

According to Save the Children (2001), teachers often think they need 'special skills' to teach disabled children. However, experience shows that, in the majority of cases, good, clear, accessible and participatory teaching – skills that teachers need to deliver quality education to all children – is effective in including disabled children in learning. Instead of fitting the child to the education system, inclusive education seeks to fit the education system to the child. Teacher training must reflect this if teachers are to have the attitudes and confidence to teach all children.

Traditionally, general teacher training and training for the special education of disabled children have been separate, with 'mainstream' teachers receiving little, if any, training on working with disabled children (Magrab, 2004). According to UNESCO (2003) the level of training on disabled children's needs is relatively high among teachers who are 'disability specialists', in contexts where they are available. But the level of training on disabled children's needs among 'mainstream' teachers is usually extremely low. This is unsurprising, as teacher education is often seen as being mainly about developing knowledge and skills, whereas the development of attitudes and values is often considered as less important (UNESCO, 2003). However, value-based training is fundamental to promoting inclusive practices and inclusive attitudes among teachers.[22]

With only one-quarter out of 100 developing countries providing some pedagogical training to all or almost all primary teachers in 2002 (UNESCO, 2006a), it can be inferred that even when 'mainstream' teachers are trained in including disabled children, the numbers are still small.

Training in the inclusion of disabled children should therefore be targeted at not only disability specialists, but also at 'mainstream' teachers, teacher educators, head teachers, managers, school administrators and other individuals in positions of governance in the education system. Specialist teachers are still needed as resources for providing support to mainstream teachers. Rather than meaning an end to special needs teachers' jobs, including disabled children actually increases

22 A number of training resources have been developed to help ministries of education address this issue. See, for example: UNESCO (2001), *Understanding and Responding to Children's Needs in Inclusive Classrooms – A Guide for Teachers*, Paris: UNESCO, UNESCO (2004), *Changing Teaching Practices – Using Curriculum Differentiation to Respond to Students' Diversity*, Paris: UNESCO, and Save the Children UK (2001), *Schools for All*. London: Save the Children.

demand for their skills in mainstream education, requiring a change to the type of pre- and in-service training they receive.

> '*...if the role of specialists is to change within an inclusive system, they also need more appropriate training to enable them to take on the role of supporting local schools in developing more inclusive practices*' *(Save the Children, 2001:46).*

Where teacher training curricula are due to be revised, the opportunity should be taken to mainstream inclusion of disabled children into the curriculum.

*Ethnicity*

As discussed in chapter 2, mother tongue instruction and 'bilingual' education are proven means of ensuring that children from ethnic minorities complete their basic education, acquire the national language and are able to participate fully in society (UNESCO 2005). National policy needs to support the training of teachers to enable them to teach the national language as a second language. Language training for teachers who do not speak minority languages and the development of learning and materials in minority languages are therefore also needed.

Teachers also need resources to adapt teaching and learning to local realities. All ethnic communities have a wealth of local people who could transmit local knowledge in schools and support education in local languages. These local resource people need some in-service training and support from teachers, but are a valuable support to non-ethnic minority teachers (Wetz, 2005). Similarly, teachers need to be given the flexibility to adapt national education curricula and materials to local contexts.

National plans for supporting the education of marginalised ethnic groups are a key means of releasing much-needed resources. There are some examples of countries that have successfully developed national plans to respond to the needs of ethnic minorities (as in the examples below from Ethiopia and Vietnam), from which other countries without such plans should be learning from and developing their own plans as a high priority.

***Ethiopia***
'The 1994 constitution transformed Ethiopia into an ethnicity-based federation and decentralized administrative responsibilities to nine regions. The accompanying education reforms were laid out in the "Education and Training Policy of 1994".Regions were given responsibility for planning, designing, implementing, and monitoring the primary education curriculum and teacher training. The syllabus remained centrally controlled, with input from the regions. Previously, Amharic had been the sole language of instruction, but the new policy gave all children the right to receive primary education in their mother tongue. At least 18 languages are now being used as the medium of instruction, although Amharic remains the national language' (World Bank, 2004a:187).

***Vietnam***
Vietnam has prepared a MDGs strategy focused on ethnic minorities, in which education features as a key means of reducing poverty for ethnic minorities. The government is aiming for universal primary education for ethnic minorities by 2010, through providing more multilingual education, minority language textbooks, training ethnic minority teachers and encouraging majority Kinh teachers to learn minority languages (Minority Rights Group, 2005).

Issues of ethnicity and its effect on conflict also have to be recognised, as there is powerful evidence to suggest that ethnic discrimination and promotion of ethnic division in schools can be a significant factor in the causes of violent conflict. For example, in Rwanda, ethnicity impinged heavily on an education system that was used by some as a tool to engender hatred and violence. A common example was that children were taught that Tutsis were 'snakes' or 'cockroaches'. A senior Ministry of Education official in Rwanda stated that before the genocide, it would be common for a teacher in a mathematics lesson to say to a class of schoolchildren: 'You have five Tutsis, you kill three. How many are left?' When interviewing Hutu refugees from Burundi, 'ethnic enemy' stories

were similarly narrated about how Hutu children would be targeted at school, how Tutsi children would bring arms into the school ready to kill their Hutu peers the next day. The importance of these 'enemy' stories lies in the strength they have in affirming existing stereotypes. Children did not just learn these stories at school, through teachers, but they were part of the fabric of life around them (Bird, 2006).

*HIV & AIDS*

Before teachers can help students become aware of how to change their behaviour to reduce their vulnerability to HIV & AIDS, and not stigmatise those already infected, teachers first need to become informed about HIV & AIDS themselves. This requires effective training about HIV prevention and about tackling stigma and discrimination in schools and the wider communities. Training should also include information about living positively with HIV &AIDS, covering treatment, care and support. There is evidence that knowledge imparted by teachers about treatment, care, support and living positively can have an impact on the uptake of HIV & AIDS testing, and therefore on prevention. However, the level of access to services is important: prevention messages are less effective if condoms or other prevention methods are unavailable. These prevention messages are still important though: simply knowing about HIV & AIDS has the potential to encourage people to reconsider some high risk behaviour (for example, by delaying sexual debut or abstinence). Similarly, messages promoting testing or treatment are less effective if these aren't available.

Without training in how to conduct lessons and open discussions around sexual health, teachers – who often find themselves posted to deeply conservative communities – are ill-equipped to tackle the deep-seated prejudices and misconceptions about HIV & AIDS. Even with training, if there is no support from the government in the form of national media campaigns and community outreach work to educate parents and communities about HIV & AIDS, lessons and discussions in school can be undermined by parental prejudice and lack of awareness:

> *'In many societies, it is taboo even at home to speak about sexual matters, sexual choices and sexual diseases... So how can we expect teachers in a conservative society to talk about sexual acts, sexual preferences and the use of condoms?' (Clive Wing of UNESCO Bangkok, quoted in UNESCO, 2005d:7).*

> '*When teachers are in conflict with social norms, such as with condom use, it's important to give them the support they need by preparing the community. That means a national campaign that will educate adults as well so that they will support the teachers' (Tania Boler, quoted in UNESCO, 2005d:6).*

Efforts by the World Health Organization and teachers' unions (under the auspices of Education International) to provide training for their members in 17 countries are laudable. However, despite these efforts, in most of the 18 countries studied in ActionAid's recent survey of educational responses to HIV & AIDS, teacher shortages and budget shortfalls meant that classrooms were too overcrowded and too under-resourced, and teachers were insufficiently trained to deliver HIV & AIDS messages effectively. Insufficient quantities of materials are reaching schools, the realities of sexual transmission are not covered, and training to enable teachers to handle the new topics was discovered to be woefully inadequate. In only three of the 18 countries surveyed, had ministries of education made systematic attempts to train teachers about HIV & AIDS (GCE/ActionAid, 2005b:5).

*Discrimination against students and teachers living with HIV & AIDS*

HIV & AIDS training for teachers is not just about communicating prevention messages, as important as they are. Training is also needed to help teachers make their classrooms welcoming and free of prejudice and discrimination in order to keep children living with or affected by HIV & AIDS in school, so that they can receive the same quality of education as other children.

*'In sub-Saharan Africa, where 70% of people with HIV or AIDS live, estimates show that by 2010, 20 million children – almost 6% of all the children in Africa – will be orphaned if present trends continue. Those in school may require special attention of teachers already managing large classes' (Motivans, 2002:3).*

*'Some students, they look at you and say that boy is HIV positive. They don't want to talk to you, they don't want to eat with you... They will be in a group and start talking in front of you saying you are sick' (Human Rights Watch, 2005:40).*

In addition, there are particular needs of children who are carrying the burden of caring for families either with the support of one parent or on their own. The burden of care tends to affect girls more often than boys, due to gendered societal views on care-giving.

*'Lisa W. said she did not even consider staying in school after her mother had died, and that all of her siblings had to drop out as well. She did not have any other relatives to turn to, and the community rejected her because her mother had been HIV positive' (Human Rights Watch, 2005:37).*

Yet it has largely been left up to individual teachers and school committees to cater for the needs of children living with or affected by HIV & AIDS, and to find ways to tackle stigma and discrimination from classmates of children living with HIV & AIDS, and from parents. The psychological and emotional needs of children living with HIV & AIDS or those who have been orphaned or traumatised by deaths in the family are also rarely catered for by government policy, and it is left to teachers to find ways to deal with their needs. Teachers and school committees have to fund these efforts themselves and battle the prejudices of parents – who often refuse to send their children to a class where there are children living with HIV & AIDS – without any assistance or leadership from ministries of education. Laws or procedures to protect the rights of students living with HIV & AIDS are rare. Despite admirable initiatives by some schools, HIV & AIDS-related stigma and lack of resources more often than not mean that schools are unable to provide adequate support to these children (GCE/ActionAid, 2005b:4).

*'...few schools provided any support to children caring for sick parents or bereaving their parent's death, and most simply acquiesced when emotionally scarred children dropped out of school or fell behind' (Human Rights Watch 2005:2).*

Teachers who are living with HIV & AIDS regularly become subjects of discrimination themselves. In particular, because teachers have an important role in society as guardians and role models for children, the perceived immorality associated with HIV & AIDS serves to vilify teachers living with the virus even more than other people living with it. The situation is further aggravated as teachers may be less likely to disclose their status if there is a lack of confidential voluntary counselling and testing services, and free or affordable access to antiretroviral treatment. No country in the ActionAid study of educational responses to HIV & AIDS had put in place sufficient laws or procedures to protect teachers from HIV & AIDS-related discrimination. In fact, it appears that the issue of HIV & AIDS-affected teachers has been ignored by governments, partly because of the controversy it causes. The rights of both students and teachers living with HIV & AIDS need to be respected and protected in national law, in HIV & AIDS workplace policies and in practice. If teachers with HIV & AIDS are cared for, supported and treated fairly, it is more likely that teachers (whether HIV positive or negative) will in turn treat HIV positive children fairly – and more likely that stigma and discrimination will be reduced in the communities that schools serve (GCE/ActionAid, 2005b:6). By extension, children are also more likely to treat each other fairly.

### *Summary of recommendations on teacher training*

- Teacher training capacity – both pre- and in-service – needs to be increased in many poor countries. Governments should work with donors to ensure teachers are provided with an adequate length and quality of training to enable them to deliver quality education. Donors should encourage governments to be more ambitious about the length and quality of training (by offering increased funding). They should recommend a combination of at least an upper

secondary qualification and one or two years' pre-service teacher training, plus substantial in-service and continuing professional development programmes to enable teachers already in the system to upgrade their qualifications.

- Para-teacher programmes and mandatory retirement measures should be phased within five years[23]. EFA plans that include such measures should be revised in consultation with teachers' unions and adequate financing should be provided by rich countries to allow governments to upgrade the skills of teachers recruited on para-teacher schemes. The 1966 ILO/UNESCO *Recommendation Concerning the Status of Teachers* should act as a guide for governments and donors seeking to reform such schemes.

- Pre-service and in-service teacher training colleges should coordinate their training and continuing professional development programmes so that newly qualified teachers and already employed teachers are able to benefit from knowledge of new methodologies and content, and so that governments are able to deliver the same quality of education across a country or region.

- All teachers should be provided with training and access to information about inclusion, focusing on gender, disability, ethnicity and HIV & AIDS and child-centred pedagogy as part of their pre- and in-service teacher training. Both pre- and in-service training should focus on enabling teachers to assess and meet the needs of individual children, rather than on generic categories of 'problem children', and on increasing their confidence to apply inclusive practices to their work.

In countries with a shortage of female, disabled or ethnic minority teachers, or with disparities in levels of teaching qualifications:

- Specially designed in-service training should be organised for female, disabled and ethnic minority teachers to compensate for the qualification disparities with other teachers. Such in-service training should be coordinated to ensure that it is relevant to local needs and that teachers in all areas of a country receive a similar quality of training.

- Positive discrimination policies should be built into posting and promotion systems to ensure all schools have representative numbers of female, disabled and ethnic minority teachers and to give such teachers access to more senior positions, where they are currently under-represented.

In both high and low HIV & AIDS prevalence countries:

- High priority must be given to training teachers to teach about HIV & AIDS. Both in-service and pre-service teacher training should include compulsory HIV & AIDS components that are examinable or certifiable. Teachers and their unions must be involved in the design and roll-out of such programmes. These programmes must be based on accurate and appropriate information that goes beyond simple prevention messages and the ABC (abstinence, behaviour change and condoms) approach (GCE/ActionAid, 2005b:8).

- Ministries of education must clearly define the rights of children living with HIV & AIDS in schools, as well as the rights of education workers living with HIV & AIDS. Workplace policies, procedures and regulations must be put in place to respond to the needs of teachers and staff living with HIV & AIDS. These should include leave policies that take account of caring responsibilities, access to confidential voluntary counselling and testing services and affordable treatment, and a principled statement from the ministry highlighting zero tolerance towards stigma and discrimination against learners and teachers.

23 It should be noted that in some exceptional or extreme situations, such as large scale emergencies or chronic conflict, para professional teachers may be the only option, and, as such, their employment, training and support would be supported by the Global Campaign for Education as a crisis measure.

## 4. MOTIVATING TEACHERS

Both UNESCO and the Global Campaign for Education have argued for some years that there is a strong link between teacher motivation and performance, and education quality. However, it is evident that in the five years since the Education For All goals were restated at Dakar, improving teacher motivation has still not been sufficiently prioritised as a major concern of national or international policy makers. As a result, teacher motivation and morale in poor countries remains in a chronic state of decline. Addressing the factors that reduce teacher motivation should be a major focus of national and international financing and monitoring, as such a focus would clearly create the conditions for the success of other education quality reforms – which teachers themselves are expected to implement (Fry, 2002:2; UNESCO, 2005a:166; UNESCO, 2006a:84).

The large class sizes caused by under-investment in teacher numbers, along with the gradual erosion of the quality of teacher training, caused by reductions in the minimum qualification standards required to teach, and the employment of para-teachers discussed in earlier chapters are themselves major causes of the decline in teacher motivation and morale. Together with other cost-cutting measures, such as the use of double or triple shifting or multi-grade teaching, the effect on teachers is not only demoralisation, but also exhaustion. Other chapters focus on some of these and other demotivating factors affecting teachers. This chapter will therefore focus on the need to pay teachers a living wage; the need for other incentives to improve teacher motivation; the need for effective management, supervision and support; teacher voice and management responsiveness; addressing the decline in teachers' status; and the gender, disability and ethnicity-related dimensions of teacher motivation and morale.

### *Teachers need to be paid a living wage*

> "'*There will be no quality education unless the basic conditions of education workers are addressed. In most developing countries teachers' salaries and working conditions are still very poor. Sometimes teachers receive their salaries late or even have to forgo payments. In these conditions, it is very difficult to talk of quality public education for all*" *Thulas Nxesi, General Secretary of the South African Democratic Teachers' Union (SADTU) and President of EI' (Education International, 2005b).*

Teacher salaries and other benefits can obviously be strongly motivating or demotivating (depending on whether they are set at an appropriate level or not). Research undertaken by VSO into teacher motivation and morale in eight countries[24] has revealed that in all countries reviewed, teacher salaries and other incentives are either woefully inadequate or, because of malfunctioning salary payment systems, are paid late, paid only partially or not paid at all. Non-salary benefits such as subsidised accommodation, travel and health insurance, where available, are often inadequate or poorly administered. As a result, many teachers have to take second jobs (often as private tutors, or by engaging in subsistence farming or other jobs) to make ends meet.

> '*If teachers are better paid so that they do not have to moonlight as a cab driver or as a cleaner...then they can start to think more seriously about their pedagogic techniques*' *(UNESCO, 2005b:7).*

This additional work contributes further to their exhaustion, affecting their ability to prepare lessons and assess students' work, and often resulting in teacher absenteeism:

> '*Low wages drive teachers into higher-status occupations, and in recent years high levels of teacher turnover and absenteeism have become entrenched, particularly in Africa... [T]eachers in Kenya are absent 20% of the time, and even higher rates are recorded in Uganda and Madagascar*' *(UNESCO, 2005a:168).*

However, unsurprisingly, because of the cost implications of increasing teacher salaries, education reforms commonly tend to focus on improving teacher training, improving working and learning

24 Guyana, Nepal, Malawi, the Maldives, Pakistan, Papua New Guinea, Rwanda and Zambia

environments, and promoting greater decentralisation of and improvements in education management: all of which can improve teacher motivation. Yet these reforms are often coupled with increases in the size of classes and/or contact hours of teachers – without improving teachers' pay or other terms and conditions of service (Bennell, 2004:viii). In fact, in many cases salaries have been frozen, or have risen well below the rate of inflation – sometimes because of caps on public sector wage bills imposed by the IMF.[25] As a result, UNESCO has reported that since a high point in 1975, when the average primary school teacher salary in all countries with per capita GDP below US$2,000, was more than six times as high as per capita GDP, teacher salaries have since declined gradually to a point where, in 2000, they had reached almost half that level. And the global figure masks even starker falls at regional and country levels: countries in the Sahel region of Africa[26] saw teacher salary levels fall by almost two-thirds in just 25 years (UNESCO, 2005a:164–5).

***Tanzania***

'Ted Mhagama, a senior official in the Ministry of Education, recognises that teachers are not paid as well as other professionals. He says "In other professions, like accountants, bankers, medical doctors and lawyers graduates earn up to $US4000 a month. But not teachers". In contrast, secondary school teachers are paid about $US150 a month and primary school teachers receive less than $US80 a month' (Education International, 2005c).

***Kenya***

'In 1991 the difference between the salary of a primary teacher and a bus driver was 1000 US$, while in all other years [between 1991 and 2000] the difference has been 100–200 US$. Teachers in Kenya have a salary corresponding to 5.3 times GDP per capita, but they earn not much more than a bus driver and less than a skilled industrial worker' (Fredriksson, 2004:15).

The implications of the decline in teacher salaries are such that teachers and their families are consequently pushed below the (already too low) global poverty line of one US dollar a day:

> *'Teachers in the large majority of LICs [low income countries] earn less than three dollars a day, which is usually the main source of household income. Given that most households have more than five people, household income per head is well under one dollar a day' (Bennell, 2004:vii).*

It is clear that in order to relieve the poverty of teachers in poor countries and enable them to provide for their families, governments and donors must ensure that teachers are provided with a living wage that is comparable with other professions requiring similar qualifications and responsibility. Teacher salaries must be set at a level that makes it possible for teachers to live with dignity on the salary from their work, and not to be forced to take on second or third jobs (Fredriksson, 2004:15).

Salary levels should, of course, be decided in properly organised collective bargaining procedures with teachers' unions, using comparisons with similar professions in the same country and with teaching positions in neighbouring countries as their starting point. Salaries that are set significantly lower than other similar professions or teaching positions in neighbouring countries will only encourage teachers to leave for greener pastures, and act as a disincentive for students considering teaching as a career.

Salary scales should be the same for all types of primary schools – based on the principle of equal pay for equal work – and in all areas, both rural and urban. In some countries, where governments have been unable to provide enough schools and teachers, then parents, communities or community based organisations have been forced to set up their own 'community' schools,

25 A more in-depth analysis of IMF conditionalities affecting public sector wage bills, including examples of countries where caps have been imposed – either openly or behind closed doors – is included in chapter 5.
26 The Sahel is the semi-desert southern fringe of the Sahara desert that stretches from Mauritania, through Mali and Niger to Chad.

independent of government control. Such community schools recruit their own teachers and pay different salaries to teachers in government schools, or recruit teachers with lower levels of training. In other places, governments have begun to subcontract the provision of education to community based organisations, or to private or local or international NGO providers, creating parallel systems of education and offering differing levels of quality to students based solely on the type of school that is available to them. Often such schools are in rural areas, creating disparities between teacher salaries (and levels of training and therefore quality) in urban and rural areas. Where the public education system has broken down in this way, donors must work with governments to bring all teachers onto the same government payroll and offer them all the same access to training and continuing professional development opportunities – as well as to bring such teachers and schools back into the government system. This is the only way to eliminate the disparities of provision brought about by the decades of neglect of public education. 'Diversity of provision' serves only to reproduce inequalities within countries.

If a government feels it does not have enough funds to finance increases in teacher salaries (however much it raises taxes or improves their collection, or however much it moves money from other sectors), that government should work together with teachers' unions and civil society education coalitions as allies to lobby donors for the promised increases in aid to finance such increases. Rich countries committed to financing all credible Education For All plans in Dakar in 2000. As teacher salaries often amount to over 80% of poor countries' education budgets, donor funding must include long-term predictable funding to finance teacher salary rises, as well as urgently needed increases in teacher recruitment and the associated training costs[27].

The need for donor help to pay for increases in teacher numbers and salaries is especially important in the context of countries where governments are abolishing user fees (with encouragement from donors). Where revenue from school fees was previously used by schools to pay teacher salaries – in both government and non-government schools – once fees are abolished, government funding for salaries has to increase substantially. But some governments that have responded to popular demands to abolish user fees have since found themselves unable to pay teacher salaries. Once more, it is teachers and the children they teach that lose out.

*Late or partial payment of salaries*

Salary administration is also poor in many countries: late or partial payment of salaries being common. Problems are sometimes the result of government moves to decentralise responsibility for salary payment to local authorities without providing adequate financial or human resources, or enough technical support to develop the capacity of those local authorities to implement localised payment administration systems (Beyond Access, 2005a:3; Bennell, 2004:vii). This suggests that where decentralisation has taken place, the improvement of salary administration systems, capacity development and training for district or provincial staff newly responsible for paying salaries should be given high priority.

***Pakistan***
'Late receipt of salaries, rather than the salary level, was a frequent complaint from teachers. When salaries are regularly late (in some cases by up to 3 weeks), teachers are understandably left frustrated, demoralised and in financial hardship. All of these factors are detrimental to teacher performance' (Choudhury, 2005:20).

***Nepal***
'Large numbers of secondary schools are being managed and financially supported by people at the community level. These are the government schools that run their lower secondary and upper secondary levels with community contributions, the lower level being supported by the government. The teachers who have been hired by the school in such schools are generally underpaid and not paid on time because of the financial constraints' (Shrestha, 2005:18).

27 A more in-depth analysis of the need for donor financing of teacher salaries is included in chapter 5.

### *Housing, travel, health and other incentives and benefits*

There are, of course, incentives other than salaries which can be used to improve teacher motivation, morale and status. These non-salary incentives or benefits can include:

- housing benefits: such as government provision of accommodation close to schools; low interest loans to allow teachers to purchase homes near to their schools; or policies for placing teachers in schools near to their extended families, in the communities where they were brought up
- food and clothing allowances
- free health insurance (for teachers and their dependants), including access to antiretroviral treatment for teachers or members of teachers families living with HIV & AIDS
- subsidised travel, which can take the form of: discounted bus or train fares; loans to enable teachers to purchase annual travel passes; loans to allow teachers to purchase bicycles or motorcycles; or the provision of free bicycles.

Strong and active community support and involvement in the life of the school can also be a strong motivating incentive for teachers. Democratic, well-resourced parent–teachers' associations, mothers' associations, school management committees or other mechanisms for community involvement can go a long way to making teachers feel supported and valued, as well as helping teachers identify the needs and aspirations of the community so that the curriculum being delivered can be adapted accordingly.

Similarly, strong consultative school, district and provincial level fora organised by teachers' union branches, in collaboration with, but independent from, district and provincial government education offices, can help teachers feel that their views are valued (if their recommendations are acted upon), which in itself can help raise their morale. Governments can use such fora to monitor and evaluate the effectiveness of newly implemented reforms or proposals, by enabling them to create a space for teachers to voice and discuss openly their opinions, directly or indirectly (via their elected teachers' union representatives) to government employed education managers.[28]

Some of these non-salary incentives clearly cost money, but they are often overlooked by policy makers. Incentives such as placing teachers near their homes (which is especially important for female, disabled and ethnic minority teachers) or improving promotion, training and professional development opportunities need not cost much at all, but can have strong motivating effects for teachers and ultimately on the quality of education they are able to deliver.

***Mozambique***

'The Government recognizes that the current salaries and conditions of work of public sector employees are not conducive to high morale or effective performance, and is therefore working with its international partners in the Consultative Group to develop a strategy to improve their wages, benefits, and working conditions. The Ministry of Education strongly supports this effort, which will benefit teachers as well as other public sector workers. At the same time, the Ministry will seek to provide teachers with access to alternative forms of compensation (e.g., opportunities for promotion, housing, community support) so as to restrain growth in the wage bill. Improvements in teachers' conditions of service is essential in order to attract better-qualified teachers, increase their time for class preparation and teaching, and reduce their dependence on second jobs and "unofficial" sources of additional income. Improvements in the compensation of teachers will be closely linked to improvements in their qualifications and performance, as teachers are provided with increased opportunities for in service training' (Mozambique Country Report, 2000: Incentives for teachers, cited in Nilsson, 2003a:20).

28 See the section entitled 'Teacher voice, government responsiveness' later in this chapter for a more detailed discussion of teacher voice.

***Nepal***

'Some teachers, considering the limited resources available, suggested non-salary incentives that could help to motivate them including: free health care to teachers and their dependants, subsidised housing close to schools and/or accommodation grants or low interest loans; grants to pay the fees of children of teachers who wish to attend upper secondary school, college or university; free bikes, or grants to allow teachers to purchase bikes; posting teachers near their homes; school, district, provincial and national level education consultation fora should all ensure that there is adequate representation of teachers' voices and views' (Shrestha, 2005:25–7).

***Malawi***

**'**...teachers agree that there is often insufficient housing, especially in rural areas. This means that teachers have to walk a long way to school. All teachers say that the quality of housing is not acceptable. For example, they complain of leaking roofs, rats, cracks and a lack of a kitchen area. One describes his house as a "hovel". Some said they cannot work at home in the evening and are distracted by these problems when they are at school. One TUM [Teachers Union Malawi] executive comments that female teachers do not want to go to the rural areas because of the standard of housing (poor hygiene and the lack of electricity)' (Tudor-Craig, 2002:14–15).

Such incentives and benefits may be especially important for retaining teachers placed in so-called 'hardship' postings – whether in remote rural areas or in economically disadvantaged urban areas. The Final Communiqué of the Fifth Meeting of the High-Level Group on Education For All, held in Beijing in November 2005, recognised the difficulty of recruiting and retaining trained teachers in rural areas:

> '*We recommend that Governments and EFA partners... promote the quality of teaching and learning, with special attention to the strategies for placing, supporting and retaining qualified and trained teachers in rural areas and improving their working conditions*' *(UNESCO, 2005c:4).*

Yet again, we can turn to the 1966 ILO/UNESCO *Recommendation Concerning the Status of Teachers,* which provides excellent guidance for governments and donors hoping to address teacher retention in rural and other 'hardship' postings:

**1966 ILO/UNESCO *Recommendation Concerning the Status of Teachers***

'Special provisions for teachers in rural or remote areas:

111. Decent housing, preferably free or at a subsidized rental, should be provided for teachers and their families in areas remote from population centres and recognized as such by the public authorities.

112. (1) On appointment or transfer to schools in remote areas, teachers should be paid removal and travel expenses for themselves and their families.
(2) Teachers in such areas should, where necessary, be given special travel facilities to enable them to maintain their professional standards.
(3) Teachers transferred to remote areas should, as an inducement, be reimbursed their travel expenses from their place of work to their home town once a year when they go on leave.

113. Whenever teachers are exposed to particular hardships, they should be compensated by the payment of special hardship allowances' (ILO/UNESCO, 1966:11).

### *Teachers need effective management, supervision and support*

> *'Management capacity at the school level is... crucial. The quality of school leadership makes the difference between an orderly environment where teachers perform and children can learn, and a chaotic environment marked by rampant absenteeism [both of students and teachers], poor school maintenance, disappearance of books and materials, and poor relations with parents and the community, as seen in all too many education systems. Simple and often costless actions such as assigning the best teachers to the early grades, adapting the school calendar to the needs of the community, and making sure that teachers show up on time and work a full week can greatly boost student attendance and learning. Effective management at the school level makes these happen' (Bruns et al, 2003:15–16).*

Along with adequate training, professional development opportunities and incentives, teachers also need functioning and supportive management structures. They need to feel valued and supported by their managers, supervisors and head teachers, as well as by district or local level education officials, in order for them to be motivated and enabled to carry out their teaching responsibilities effectively.

Yet years of budget cutbacks have left education management systems severely weakened. Teachers interviewed in the literature recount that administrative and bureaucratic systems are often unable to deliver teaching and learning materials, information about new syllabuses and curricula, or provide effective supervision, continuing professional development and fair promotion systems.

The role of head teachers, middles managers (such as heads of departments), supervisors and local level education officials is of fundamental importance to teacher motivation:

> *'It is the head teacher who is responsible for dealing with day-to-day school issues – teacher management, student discipline, community participation, parent–teacher associations, and implementation of the School Improvement Plan. The head teacher also has a key role in maintaining a good working environment and in team building' (Shrestha, 2005:39).*

Yet it appears that head teachers in some poor countries tend to be promoted from classroom teaching into school management positions with little organised training (other than having observed existing managers carry out their duties). Middle managers, supervisors and local level education officials similarly receive little or nothing in the way of management training. Moreover, teachers are commonly selected for management positions on the grounds of length of service rather than aptitude. The lack of pre- or in-service management training and a similar absence of continuing professional development opportunities for head teachers and other managers have a knock-on effect on classroom teachers, as their managers are consequently unable to provide them with the support they need. If managers don't benefit from regular line management meetings and appraisals or other continuing professional development opportunities themselves, they can hardly be expected to be able to provide good quality support to the teachers they manage.

In addition to these problems, due to the chronic under-funding common to poor countries, head teachers and other managers rarely have sufficient numbers of support staff to take care of administrative matters. Administrative duties, rather than teacher management and support, end up occupying the vast majority of managers' time. Where there are shortages of classroom teachers, or high rates of teacher absenteeism, head teachers may also have to cover for the missing teachers – some end up with teaching workloads almost as heavy as classroom teachers – minimising the time available for teacher management even further.

As a result, teachers become overloaded with work because of weak management and a disconnect between teachers' capacity and the unrealistic expectations of head teachers and managers. Such heavy workloads act only to intensify the demotivation of teachers.

***Zambia***

'Teachers found it demoralising when they perceived that head-teachers were personally unsupportive, when they appeared to make arbitrary decisions about promotions (a particular concern of women teachers, who often felt overlooked) and when they did not deal with poor relations between staff. Furthermore, teachers felt that Provincial and District officials were unsupportive and that the operations of these offices were not transparent and accountable. The DEOs and PEOs [district and provincial education officials] acknowledged such feelings, but felt that their perceived shortcomings were a result of inadequate funding and staffing... The current system of promoting classroom teachers to head-teachers not only removes good teachers from classrooms, it also means that some head-teachers do not have the appropriate capabilities to fulfil their management roles (Verhagen, 2001:27).

***Pakistan***

'A group of male AEOs [Assistant Education Officers] interviewed in Mianwali claimed to visit an average of five schools per week, during which they verify the number of children in school, observe student behaviour, monitor attendance and absenteeism of students and teachers, observe the performance of teachers and the physical condition of the schools (buildings, electricity, furniture, access to clean drinking water)... However [in interviews with teachers]... it was evident that inspection visits are far from regular and experiences with such visits tend to vary widely... At best, a school may receive a visit from the district office once in a month. At worst, one teacher remarked: "The EDO [Executive District Officer] has come only once in the two years since I have been teaching at this school and I have never seen any other district officer inspecting our school" Primary school teacher, Mianwali' (Choudhury, 2005:14).

***Maldives***

'...many teachers also cited that supervisors were not providing the support that teachers need. Many of the teachers are untrained or recently qualified and want or need guidance. Some supervisors fulfil this role well and make classroom observations and give constructive feedback to teachers, supporting them in discipline issues, teaching and learning, planning lessons etc. Where this happens, it is much appreciated. In some schools however, this is not happening effectively and many supervisors are dealing with administrative rather than classroom matters. "Our supervisor cannot always advise us; he too needs training" Trained primary teacher' (Wheatcroft, 2005:17).

A further problem is discrimination based on gender, ethnicity, disability or HIV status. Such discrimination can manifest itself in, for example, promotions and disputes between teachers. In Zambia and Papua New Guinea, it was reported that head teachers often favour male teachers over female teachers when they need someone to deputise for them or take on sought after duties. Female teachers also reported that heads were more likely to believe male teachers in disputes between teachers (Fry, 2002:29–30). Female teachers interviewed in Zambia and Papua New Guinea, reported that they felt they had been deliberately overlooked for promotion on the basis of their gender. In some cases, female teachers suffered sexual harassment by male teachers.

> *'"My fellow teacher proposes love to me, but I don't want it and I deny him. Then he goes to the headmaster and tells him I don't do my job and so and so... Of course the head listens to him, so what can I do?" Female teacher, high school, Zambia' (Verhagen, 2002:22).*

A lack of opportunity for promotion is also a common problem in the countries surveyed in the literature, for all teachers. The scarcity of promotion opportunities seems to be because of insufficient levels between classroom teaching and head teaching. Often, the only way to progress is by either leaving the profession or moving on to an administrative position. Either way, the school ends up losing good teachers, simply because there are limited channels for career progression. Some countries also suffer from a lack of transparency and equity in how promotions are decided. National level policies, laws and procedures to tackle bias and discrimination against female teachers, disabled teachers, ethnic, caste and other minorities (in promotion processes and

elsewhere) are conspicuous by their absence in many countries, further degrading the morale of such teachers.

***Malawi***
'In Malawi, interestingly, dissatisfaction with school management was predominant amongst female teachers and much less mentioned amongst male teachers, who generally reported that they felt included in school decisions and that decisions about promotions were fair' (Fry, 2002:29).

***Pakistan***
'Teachers would favour a more meritocratic system in which good performance is rewarded with promotions and bonuses and poor performance is sanctioned. The incentive structure for teachers is undermined by the patronage networks which often determine who gets promoted and who goes for training' (Choudhury, 2005:5).

***Maldives***
'...what many teachers were concerned about, is that there appears to be a certain amount of favouritism taking place in schools and it is possible for teachers to be selected for promotion because they are popular with the school head or island chief. Another reason given for some teachers being promoted is that they do not have the English language skills required to teach the English medium curriculum and are therefore removed from the classroom and given supervision duties. This situation creates demotivation in teachers who do work hard and are good at their job but are not rewarded' (Wheatcroft, 2005:17).

Clearly, the introduction of management training and professional development programmes for head teachers and other education managers should become a high priority if these problems are to be addressed. Training should include approaches to managing a team, budgeting and planning skills, principles of supportive and motivational management, including conducting appraisals and whole school evaluation, and facilitating professional development activities for teachers and other staff.

> *'"Supervisors and heads need training because methodologies are changing; we need to keep up with the changes. We would like to have the chance to get together with other heads and discuss these things. A mechanism for sharing ideas with other schools would be good" [Maldivian] primary head teacher' (Wheatcroft, 2005:21).*

> *'"I didn't get training for this and it would make for more confidence, otherwise I don't feel I know whether what I am doing is right or the correct method...the way in which I do things is according to what I have observed from other Deputy Headmasters" Deputy headmaster, high school [Papua New Guinea]' (Tweedie, 2001:14).*

Managers, as well as teachers, need professional development opportunities to enable them to carry out their responsibilities in a reflective way. Opportunities need to be created for them to observe and learn from good practice in other schools and discuss management issues with their peers. Exchange visits to nearby schools and regular meetings with other managers in their district or region can help to provide space for such discussion and learning.

> *'Another way of developing co-operation, is the concept of "school family" in Sri Lanka. According to this concept a few schools (3–5) situated in close proximity to one another were organised as a family of schools, where one of the principals was identified as the leader. This family serves as a quality assurance body by affording opportunities for the teachers and principals of primary schools to meet at a forum to discuss and share experiences' (Nilsson, 2003b:24).*

Head teachers and managers also need effective appraisal systems for themselves, which should include gathering feedback on their own performance from the teachers and others they manage, as well as from their own managers.

In addition to training and continuing professional development opportunities, head teachers and other managers need to be equipped with enough support staff to perform the required administrative tasks that otherwise take up a disproportionate amount of managers' time (Shrestha, 2005:41).

Head teachers and managers also need skills for communicating and consulting about school development with a wide variety of audiences (teachers, students, parents, school inspectors and other education officials). Managers need to be able to conduct participatory meetings with such stakeholders not only to communicate and implement government-led reforms, but also to gather feedback and ideas from school level stakeholders and communicate their ideas back up to provincial or national level policy makers for use in policy reviewing and planning. One way of doing this is through school-based self-evaluation:

> *'One concept that is often used is school-based evaluation, meaning a process by which teachers discuss their own school as a group of professionals in such a way as to improve the quality of education... The self-evaluation model had an enormous impact in England and Wales. Over 30 local education authorities adopted this approach in their schools as a way of head teachers and teachers gathering information and using it for school improvement' (Fredriksson, 2004:9).*

To improve promotion opportunities for teachers, national policy makers should ensure that schools include more promotional levels to allow teachers to progress up the pay scale and be rewarded for good performance. Continued professional development programmes should work alongside the promotion system to ensure development opportunities are provided for future educational leaders and managers.

Safeguards should also be put in place – in the form of laws, guidelines and monitoring and evaluation systems – to prevent discrimination against female, disabled, ethnic or caste minority, or teachers living with or affected by HIV & AIDS in promotion procedures and the allocation of privileged duties. In addition, disciplinary procedures and codes of ethics should be instituted to enable managers to sanction staff for poor performance, and provide support for managers when making unpopular decisions – for example, when disciplining teachers for sexual harassment (or other forms of discrimination) or chronic absenteeism (Vadher, 2004:32). Teachers' unions have taken the lead on codes of ethics in many countries, and should serve as a valuable resource for head teachers or education officials wishing to implement codes of ethics in their schools (Fredriksson, 2004:11).

### *Teacher voice, management responsiveness*

> *'"In many countries, dialogue and seeking consensus are not the fashion of the day. Rather, leaders resort to their notion of 'strong leadership' and skip the consultation process. I come from a country where the majority of the population was never consulted for decades. Systematic exclusion was a disaster for the country. After liberation, we all discovered the need for and the great value of dialogue. As EI President, I seek to promote this spirit of dialogue between education authorities and unions wherever possible. EFA can only be achieved when all stakeholders are included. Not as a favour but as a fundamental right. I call upon all donor governments to institutionalise the consultation of unions as part of the criteria of Good Governance" Thulas Nxesi, General Secretary of the South African Democratic Teachers' Union (SADTU) and President of EI' (Education International, 2006b:9).*

> *'...the dynamic between working towards increased voice for stakeholders and increased responsiveness on the part of government institutions... [implies a move] towards key stakeholders, such as teachers, other civil servants, parents, students and the wider community, being actively involved in decision-making processes within education; <u>and</u> promoting responsiveness, transparency and accountability*

*from organisations that have a duty to realise people's rights to education' (Webber, 2006:1).*

One of the strongest findings of both Education International's and VSO's Valuing Teachers research is that, in all countries surveyed, one of the most demotivating factors for teachers, and one of the biggest blockages to effective policy reform, is a perceived and actual lack of teacher voice in decision making about education reforms and the implementation of those reforms. The problem seems to be endemic at all levels of the system – from the school level where teachers' views are often ignored by head teachers, managers and inspectors, all the way up to state or national levels where teachers' representatives are more often than not denied a place at the table by governments and donors alike. Repeatedly throughout the VSO research, in all countries surveyed, teachers expressed their joy at being asked for their views – most reporting that they had never before been asked for their opinions.

In all education systems, teachers play a pivotal role in delivering education reforms. Teachers are both recipients and deliverers of this change, and are thus better placed and better informed than any other stakeholders about what does and does not work in education policy. Teacher participation in the design, implementation and evaluation of policy initiatives is therefore essential if reforms are to succeed.

*'If teachers themselves are not clear about the changes in education policy, it is almost impossible to achieve the goals, no matter how good the new policy is' (Shrestha, 2005:48).*

***India***

'Researchers at the University of Edinburgh concluded that lack of consultation led to the failure of India's "Operation Blackboard", a government programme that aimed to ensure that all schools had at least two rooms and two teachers, and that all teachers had a package of essential teaching aids. The researchers found that, in Gujarat, the programme fell apart because, "failure to consult teachers, or their representatives, at any planning stage contributed to demoralisation, alienation and passive resistance"' (Fry, 2002:6).

At the school level, there appears to be a widespread lack of involvement of teachers in decision making by school management. Teachers interviewed in the literature feel they are rarely consulted about important decisions and reforms that affect their work. In many cases, communication between managers and teachers is in the form of orders and instructions.

*'Teachers have many good ideas about the organisation of the school, curriculum, planning and extracurricular activities but don't feel that the opportunities exist for them to contribute towards such decisions' (Wheatcroft, 2005:27).*

At the district or local level, government education offices remain under-resourced in terms of both finances and human capacity, which results in inefficiency, regular system breakdown (such as the problems of late payment of salaries discussed earlier in the chapter) and a lack of capacity to implement effective two-way information, communication and monitoring and evaluation systems. Information about education reforms can consequently fail to reach school managers and teachers at all. This is especially the case for managers and teachers in rural or geographically remote areas, who often fail to receive crucial information bulletins and newsletters because of dysfunctional postal systems, or a lack of capacity in district and provincial education offices to produce and circulate them.

*'Inconsistent policy is a continuing problem in education. Policies are constantly changing, and communication is so slow that no one knows what the new policies are. This creates a challenge for all participants in education' (Shrestha, 2005:51–2).*

Where opportunities exist for consultation on reform plans, they are often poorly advertised or are held in inconvenient (usually urban) locations. School managers and teachers in rural or remote

areas therefore either never get to hear about them, or are unable to travel to them because of the distances and time involved (Fry, 2002:31).

At the national level, governments tend to decide education policies by employing expensive consultants or by following the advice of donors, the IMF, the World Bank or the UN agencies, rather than effecting rigorous consultation processes. Evidently, proper participatory consultation processes with all stakeholders at all levels of the education system, would serve to provide invaluable information for reviewing already implemented reforms and allow new reform proposals to be tested for popularity, realism and equity. Despite commitments made at the World Education Forum at Dakar in 2000,[29] consultation process for including the voices of teachers through their union representatives and through civil society coalitions remains extremely weak or non-existent in many countries.

> '*...challenges to full participation by CSOs remain. The most pressing one is the degree of space and opportunity that governments provide. In some countries, this is not available; in many countries, for example, teacher organizations and unions are not fully engaged in national policy discussions*' *(UNESCO, 2006a:78).*

> '*While teachers may be "perhaps the most important constituency in education reform", overall in many regions they continue largely to be "ignored in policy dialogue, monitoring and implementation"*' *(World Economic Forum, 2005, cited in UNESCO, 2006a:91).*

Participation and involvement of teachers and their representatives – at all levels – in defining and revising policy reforms is the key to ensuring not only that their needs are taken into account and appropriately addressed, but that other educational reforms are successfully implemented.

To address the problem of lack of teacher participation in decision making at the school level, the establishment of mechanisms through which teachers' views – as well as those of students, parents and other community members – are listened to and acted upon by head teachers and other school managers would greatly enhance the motivation and performance of teachers, and therefore the quality of education they are able to provide. For example, head teachers could call regular meetings of teachers and parents to address current issues and come to a consensus about school improvement plans and budgets, so that they reflect the needs and aspirations of parents, while being grounded in teachers' experience. Attempts should be made to ensure such meetings are inclusive, ensuring women, disabled people, ethnic minorities and people living with HIV & AIDS – both within the teaching force and parents and community members – are represented and encouraged to participate actively (Shrestha, 2005:41). UNESCO argued in the 2005 *Education For All Global Monitoring Report* that such school level devolvement of decision making makes schools:

> '*...more democratic, allowing teachers and parents to take school-based decisions; more relevant, since decision-making powers are closer to where problems are experienced, leading to more appropriate and relevant policies; less bureaucratic, since decisions are taken more quickly; more accountable, as allowing schools and teachers a greater say in decisions implies greater responsibility for their performance*' *(UNESCO, 2005a:173).*

The UK's Department for International Development has also argued recently that such downward accountability at the local level can help to improve the delivery of education services because it

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29 'To achieve these [Education For All] goals, we the governments, organizations, agencies, groups and associations represented at the World Education Forum pledge ourselves to...

> iii) ensure the engagement and participation of civil society in the formulation, implementation and monitoring of strategies for educational development;
> (iv) develop responsive, participatory and accountable systems of educational governance and management' (UNESCO, 2002:101).

'...reduces corruption and improves the equitable provision of services. This will become even more important as the level of investment increases' (DFID, 2005:4).

At the district, local and provincial levels, systems clearly need to be strengthened, funding increased and human resource capacity increased and developed, to enable education officials to perform their duties more effectively. There are no doubt also motivation and retention problems among education officials working in district or provincial education offices, which will need to be addressed with improved incentives, training, professional development and management.

At the national level, education policies, curricula content etc., should be developed with the participation of representatives of all stakeholders including, but not restricted to, teachers and their elected union representatives, and civil society education coalitions. Many countries now have highly active Global Campaign for Education affiliated coalitions – usually led by teachers' unions – that provide governments with convenient, ready-made mechanisms for dialogue with representatives from a broad range of civil society education stakeholders. Such coalitions can also provide invaluable monitoring and evaluation information for ministries of education. For example, the budget monitoring work of Malawi's Civil Society Coalition for Quality Basic Education has provided the Malawi Ministry of Education with significant information about teacher absenteeism and textbook delivery systems. Participatory consultation processes serve not only to improve teacher motivation, but also help to make policies more realistic. If teachers feel they have been consulted – and that their views have been taken into account – they will feel more ownership of the reforms, and be more willing to implement them (Shrestha, 2005:49).

There are a number of other ways that teacher voices can be used to inform and strengthen national policy making and ensure the implementation of reforms is effective. For example, new policies and decisions can be disseminated through different means of communication (school notice boards, newsletters, newspapers, radio, television and the internet). This can ensure that all teachers and other stakeholders have access to information about education policy reforms, help to develop the credibility of the government and enable the participation of other stakeholders – especially those in rural or remote areas. However, it is important to ensure that communication systems are not just about sharing information from the top down. Two-way communication mechanisms should be instituted to allow teachers and their union representatives, students, parents and parents' associations to feed in their ideas on policy proposals and on implementation successes and problems (Shrestha, 2005:51–2).

> *'A key lesson from the Tanzanian experience is that formal communication channels, while important, are not enough to incorporate teachers' voices in educational decision making. Extra steps are needed to overcome misunderstandings and bring in the views of local and district union leaders. The capacity of teachers' organizations for research and for development and defence of policy positions must be strengthened' (UNESCO, 2005a:182).*

Governments must ensure that teachers have the right to form and control their own representative organisations and have the right to be consulted and participate in the process of formulating educational policies. For this to happen, mechanisms need to be established, where they don't already exist, for information exchange, consultation and negotiation between the teachers' unions and ministries of education (Fredriksson, 2004:17).

For their part, teachers' unions should continue to expand their remits beyond negotiations with governments about salaries and other incentives and benefits. Where they aren't already doing so, teachers' unions should be supported by governments, donors and international NGOs to develop holistic positions on other issues such as:

- teacher training and professional development
- tackling HIV & AIDS issues and gender, disability and ethnicity discrimination in the teaching force and in classrooms
- curriculum development and examination and assessment policies
- teachers' participation in decision making at school, district/local, provincial and national levels.

This will empower them to engage in stronger advocacy for improvements in policies and practices that affect the quality of education.

For teachers, their elected union representatives at the national level are clearly the most appropriate points of contact for ministries of education. However unions and ministries should work together to ensure mechanisms such as participatory action research, opinion polls, surveys, questionnaires and radio and television phone-in discussions are used to enable classroom teachers, head teachers and other school level education stakeholders to have their say on new or implemented reforms.

***Tanzania***
'...teachers have no forum in which to express their views on policy matters, curriculum development, examination and other issues that directly concern them. TTU [Tanzania Teachers' Unions] is in a position to rectify this. It is the responsibility of TTU to ensure that teachers' views are sought and used in policy decisions, curriculum development and examination matters, and that information on new policies, curriculum changes, and other education related matters is sent to teachers. TTU need to organise a forum for teachers to debate these issues so that their views can become known to the TTU and be incorporated into their advocacy work' (Sumra, 2005:46).

### *Addressing the decline in teacher status*

Collectively, the conditions described thus far undermine teachers' ability to deliver anything even remotely resembling good quality education and help explain why many teachers leave the profession altogether (UNESCO, 2005a:166). The increasing reliance on less qualified or unqualified teachers with lower wages and job security; the generally lower standards of teaching that have resulted; the feminisation of the profession in many countries (see below); the dramatic decline in the standard of living of teachers; and problems of management, voice and responsiveness just discussed, have all exacerbated the 'de-professionalisation' of teachers in poor countries. The status of teachers in the eyes of society appears to have declined in direct proportion to the decline in salary levels and in the quality of training. Teaching has, as a result, become a profession of last resort among many secondary school leavers (or university graduates). 'Consequently, teachers often lack a strong, long-term commitment to teaching as a vocation' (Bennell, 2004:iii).

***Tanzania***
'The study clearly shows that there is a widespread perception among teachers that only those students who fail to make the grade for other professions join teaching' (Sumra, 2005:44).

***Nepal***
'Salary and financial incentives not only have the potential to motivate existing teachers but also attract more committed people to the teaching profession. Because of low pay, teaching is not the first choice for many people who are thinking of a career. Students who go to education colleges in Nepal are generally the ones who could not get admission to other faculties, such as science and commerce' (Shrestha, 2005:25).

To make matters worse, communities regularly turn to teachers as convenient scapegoats for the failure of education delivery. Despite constricted education budgets – leading to under-investment in teacher recruitment and training, spiralling class sizes, and hasty, poorly planned

decentralisation processes – leading to overworked and under-trained education managers and head teachers, it is usually teachers who are blamed for any decline in the quality of education.

Clearly, measures that will improve the status of teachers are those that address the problems they face, as discussed so far. Therefore, recruiting more teachers in order to reduce class sizes, improving the quality of training and continuing professional development, phasing out para-teacher schemes, improving salaries, incentives and teacher management and voice – all of these will inevitably raise the status of teaching so that it becomes an attractive profession for school and university leavers.

However, there are additional measures that can be taken to address the decline in the status of teachers. Media or other types of public awareness campaigns – whether led by governments, teachers' unions, civil society education coalitions or an alliance of some or all of these – can be used to enhance the image of teachers by publishing stories about successful and motivated teachers, and students who are succeeding because of their teachers' efforts (Shrestha, 2005:65). Awards schemes for the 'teacher of the year' or other such titles can also be used to raise the profile of successful and dedicated teachers. Such award schemes can help raise self-esteem for the award winners as well as stimulate healthy and motivating competition between other teachers.

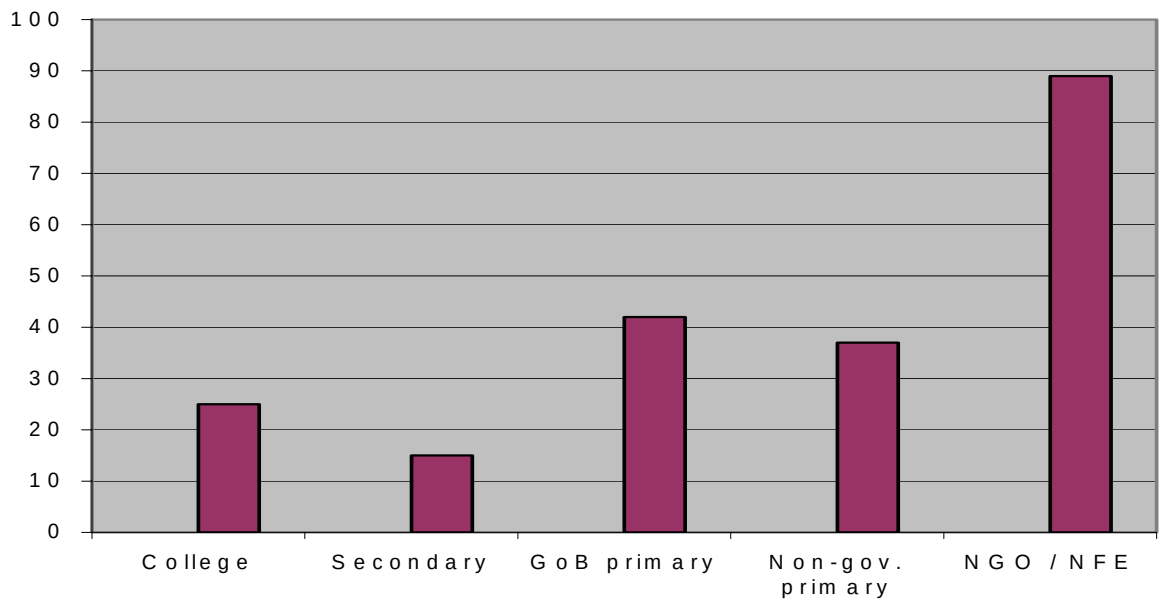
> *'In socialist Vietnam…*[the government awards] *honourable titles such as "people's teacher" or "teacher emeritus" to teachers who have contributed significantly to schools in disadvantaged communities' (Sives et al, 2004:4).*

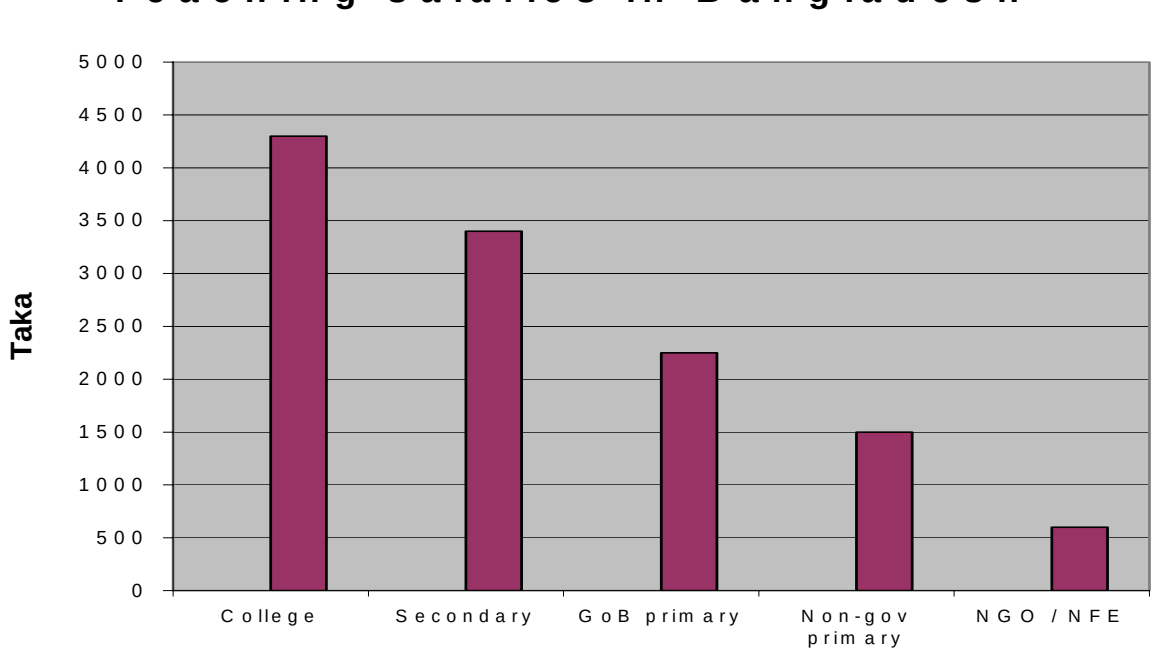
Once class sizes, training, incentives and management have been improved, government teacher recruitment campaigns can do much to raise the attractiveness of the profession to secondary school leavers or university graduates who may be considering teaching as a career, by advertising the improvements in the profession.

### *Gender, disability and ethnicity-related dimensions of teacher motivation, morale and status*

*Gender*

Women teachers often have even lower pay and even fewer opportunities for promotion than men do. Positions of authority in education systems are overwhelmingly dominated by men – in Bolivia, only 16% of head teacher posts are held by women (UNESCO 2003:179). It is more often than not women who are employed as 'para-teachers', at a fraction of the salary of regular teachers, which has serious implications for the professionalism and status of women (Beyond Access, 2005a:3). The feminisation of primary teaching profession in some poor countries has resulted from primary level teaching being viewed as women's work, or because men have better access to training and promotions opportunities than women. Men are therefore more often employed in secondary and tertiary education than women are, and, as a result, receive better pay and incentives and experience higher motivation and morale levels than women. Female teachers are thus viewed by those societies as having a lower status than male teachers. The graphs below dramatically illustrate the percentages of women teachers across primary, secondary and tertiary levels of education in one case – Bangladesh – compared to the different salaries paid at each level.




(Raynor and Pervin, 2005).

Official policies don't always make female teachers' jobs easier. In some countries, women have inadequate arrangements for maternity leave (Beyond Access 2005a:3), and the posting of female teachers to rural areas, often far from their own communities, may pose particular difficulties for them. For example, female teachers in Pakistan expressed concerns about the increased risks of physical insecurity and sexual harassment of being posted far from home (Choudhury, 2005:22).

It is clear that policies – such as quotas and scholarships – aimed at increasing the numbers of female teachers, must be accompanied by measures to improve the working conditions, motivation, morale and status of women managers and teachers. These might therefore include ensuring that

women have adequate arrangements for maternity leave and the right to request temporary part-time hours upon their return to work, without loss of pay or pension rights. To reduce the burden of childcare for women, policies should also allow paternity leave arrangements and part-time working for male teachers who are fathers. Teachers, whether male or female, who take their child care responsibilities seriously should not be penalised for doing so. Measures such as ensuring accommodation is safe – particularly for teachers living in rural areas, and placing more female teachers near to their own communities or extended families should be implemented. In many cases, this may involve actively recruiting and training women from the local area. Effective anti-discrimination disciplinary procedures, laws and codes of ethics should also be implemented and enforced.

*Disability*

Where teachers are trained to include disabled children in their classroom practice, their ability to promote inclusion of disabled children in the classroom can be constrained by large class sizes, a lack of appropriate materials and other support, building accessibility and the curriculum, which may not reflect the existence of disabled people in society in positive ways.[30] A lack of such enabling resources and working conditions can detrimentally effect the motivation of teachers and impede their ability to put into practice any training they may have received about including disabled children.

In some countries, for example, in Mongolia, teachers' pay and promotion prospects depend on the marks children receive in exams. This means that teachers are reluctant to accept children with special needs in their classes, as they fear the children will perform poorly, thus affecting their income and career progression.

Resources, working conditions and curricula that constrain teachers' efforts to include disabled children must be addressed. For example, teaching aids and resources for blind, deaf and physically disabled children must be made available, and adjustments to school buildings to improve accessibility for both children and teachers with disabilities must be made. Creating an enabling environment and providing the resources needed, will itself improve the motivation of all teachers – whether disabled or not – and enable them to include all children in classroom interactions.

*Ethnicity*

Teachers are often reluctant to work in the remote areas – which are often populated by ethnic minorities – because remote postings may exclude them from promotion opportunities. As we have seen, female teachers can also find it particularly hard to find suitable accommodation in remote areas. These recruitment difficulties in remote areas often lead to less well qualified and motivated teachers working in ethnic minority areas (Save the Children, 2005). VSO's consultations with teachers suggest that enhancing teachers' promotion prospects and rewarding them financially with special hardship allowances, accommodation and travel benefits are some of the ways of making remote placements more attractive and improve teacher motivation, morale and status (Fry, 2002).

The use of mother tongue medium of instruction and bilingual education can also help retain teachers in rural or remote postings, as it has been proven to foster faster learning outcomes for ethnic minority children, which itself can be motivating for teachers. Instituting bilingual education would also enhance the motivation of teachers recruited from ethnic minority communities, as it would allow them to teach in their own language

30 A UNESCO (2003) report, suggests a number of key elements to an inclusive curriculum: broad common goals defined for all, including the knowledge, skills and values to be acquired; a flexible structure to facilitate responding to the diversity and providing diverse opportunities for practice and performance in terms of content, method and level of participation; assessment based on individual progress; cultural, religious and linguistic diversity of learners acknowledged; and content, knowledge and skills relevant to learners' context.

### *Summary of recommendations to improve teacher motivation, morale and status*

Once again, the 1966 ILO/UNESCO *Recommendation Concerning the Status of Teachers* provides ready-made recommendations for governments and donors on teacher salaries:

> **1966 ILO/UNESCO *Recommendation Concerning the Status of Teachers***
>
> 'Teachers' salaries should:
>
> (a) reflect the importance to society of the teaching function and hence the importance of teachers as well as the responsibilities of all kinds which fall upon them from the time of their entry into service;
>
> (b) compare favourably with salaries paid in other occupations requiring similar or equivalent qualifications;
>
> (c) provide teachers with the means to ensure a reasonable standard of living for themselves and their families as well as to invest in further education or in the pursuit of cultural activities, thus enhancing their professional qualification;
>
> (d) take account of the fact that certain posts require higher qualifications and experience and carry greater responsibilities' (ILO/UNESCO, 1966:11–12).

In addition, the following recommendations on teacher motivation, morale and status can be drawn from the preceding discussion.

- Salary levels should be decided nationally in properly organised collective bargaining procedures with teachers' unions, using comparisons with similar professions in the same country and with teaching positions in neighbouring countries as a starting point.

- In countries with large non-state sectors with different salary structures, rich countries must work with governments to bring all teachers onto the same government payroll, bringing schools that have been privatised or 'sub-contracted' out to non-state providers back into the government system.

- Governments should work together with teachers' unions and civil society education coalitions at national, regional and international levels as allies to lobby donors for increased, long-term, predictable aid to finance increases in teacher salaries, as well as increases in teacher recruitment and training costs.

- Where decentralisation of salary payment, policy communication and consultation, and monitoring and evaluation has taken place, high priority should be given to the improvement of those systems and capacity development, as well as improved incentives, training, professional development and management for district or provincial staff newly responsible for paying salaries.

- Housing, travel, health and other incentives and benefits discussed above should be used as a complement to salary rises – especially in rural or otherwise disadvantaged areas, where 'hardship' allowances can also be utilised.

- The introduction of both pre- and in-service training and professional development programmes for head teachers and other education managers should be a high priority. Head teachers and other managers also need to be equipped with enough support staff to perform the required administrative tasks and free up managers' time for teacher management.

- National policy makers should ensure that schools include more promotional levels to allow teachers to progress up the pay scale and be rewarded for good performance. Continued

professional development programmes should work alongside the promotion system to ensure development opportunities are provided for future educational leaders and managers.

- Safeguards and disciplinary procedures should be put in place – in the form of laws, guidelines, codes of ethics, and monitoring and evaluation systems – to prevent discrimination against and promote equal opportunities for female, disabled, ethnic or caste minority, or HIV positive teachers in promotion procedures and the allocation of privileged duties.

- Two-way communication and consultation mechanisms (such as newsletters, participatory action research, opinion polls, surveys, questionnaires and radio and television phone-in discussions – as well as more formal consultative meetings and workshops) should be instituted to allow all stakeholders to feed in their ideas on national level policy proposals and on implementation successes and problems. Opportunities for consultation on national reform plans should be well advertised and held in all areas of a country, in locations that are accessible for rural as well as urban-based teachers.

- At the very least, ministries of education should engage in regular and constructive dialogue about education evaluation and reforms with teachers' union representatives and civil society education coalitions. Teachers' unions should be supported by governments, donors and international NGOs to develop holistic positions on quality education issues and government policy and practice.

- Media, public awareness or teacher recruitment campaigns should be used to enhance the image of teachers by highlighting messages about successful and motivated teachers, and students who are succeeding because of their teachers' efforts.

- Adequate arrangements should be made for maternity and paternity leave and both male and female teachers should have the right to request temporary part-time hours upon their return to work, without loss of pay, pension rights or opportunities for promotion. To encourage women to enter or remain in the teaching profession, other benefits such as housing close to schools, posting female teachers in schools near their own communities and lower entry requirements for teacher training colleges should also be instituted.

## 5. QUALITY TEACHING COSTS

### *How did we get here?*

How has this desperate situation come about? The long-term causes are well known but bear revisiting to put the current crisis in historical context. Many countries now struggling to open the doors of learning to all spent the two decades up to the turn of the Millennium straining under the burden of unpayable debt. Investment in social sectors – such as health and education – was severely constrained in order to meet debt repayments. In 1999, Ethiopia spent US$6 per capita on debt-servicing compared to US$2.5 per capita on education. Such problems were compounded by prescriptions arising from structural adjustment programmes, which prioritised short-term fiscal objectives over public sector investment. And, at the same time as domestic budgets were squeezed between these two pressures, aid fell dramatically in the 1990s, shrinking to its lowest ever level in real terms by 2000 with a tiny proportion – just 1.4% – of donor aid going to basic education.

By 2000, a shift in the terms of debate about development and poverty had occurred. Promulgated by the World Bank, poverty reduction became the new mantra, and governments were encouraged to prioritise strategies and spending designed to mitigate the impact of economic adjustment and benefit the poor. Rich countries backed this philosophy; the Education For All Declaration, Millennium Development Goals and subsequently the Monterrey Consensus[31] supposedly made this project a global endeavour and responsibility. During 2005, rich countries further promised to raise aid to US$50 billion by 2010 and offering full debt cancellation to 18 highly indebted poor countries. The high-profile political events of the year – the G8 Summit and Millennium +5 Summit – delivered endorsement of 'free primary education of good quality' for all children.

However, an analysis of the situation facing many developing countries reveals that they are today still desperately short of resources needed to make the right investments in their education systems.

### *Governments: could do better*

National governments aiming to achieve Education For All must recognise the fact that teachers are pivotal to the project. But ensuring that there are enough teachers, that they are adequately remunerated for their efforts, and are supported by appropriate incentives, training and management all costs money.

Government funds have always been, and will remain, the major source of expenditure on education as a whole and especially for those aspects that enable the recruitment and retention of a suitable teacher workforce. Typically, teacher salaries make up between 65% and 95% of countries' recurrent budgets. Low economic growth has restricted the ability of many of the poorest countries to finance primary education. Nevertheless, more could be done. Despite longstanding commitments to increase education spending to 6% of GDP, countries in Africa and South and West Asia still devote an average of less than 3.5% of GDP to spending on all levels of education (UNESCO, 2005a). Primary education receives less of their GDP, on average, than military spending.

The UNESCO *Education For All Global Monitoring Report* for 2006 shows that there is considerable variation in the patterns of domestic investment in education, despite increasing global consensus on appropriate levels of expenditure. Public spending on education as a share of national income increased between 1998 and 2002 in about two-thirds of countries, according to the report. Education's share of the national budget, which is a useful indication of domestic political priorities, typically ranges between 10% and 30%. More than half the countries in sub-Saharan Africa with data available spend over 15% of the government budget on education. Yet

31 Declared at the International Conference on Financing For Development, the Monterrey Consensus committed governments to 'a new partnership between developed and developing countries'. It urged that as long as they respected principles of good governance and mobilised sufficient domestic resources, rich countries should play their part by encouraging investment, freeing the terms of trade, tackling debt and increasing ODA.

even where public spending matches internationally recommended targets, it is often simply not enough to get all children into school while protecting and improving the quality of education.

Faced with budget constraints and pressure from both domestic and external sources to expand education, countries have resorted to hiring contract or non-professional teachers (as discussed in chapter 3). Although non-professional teachers can provide an important stopgap for staffing inadequacies, these untrained, poorly compensated teachers are struggling to provide a quality education.

Domestic political will is clearly key, but countries are critically constrained by a number of external factors. As highlighted above, the last few years have seen repeated promises from the international community that plans and strategies that aim to reduce poverty and achieve the MDGs will receive timely and effective support from donors and international institutions. Disappointingly, however, it appears that reality falls short of their grand statements, leaving countries in the lurch when it comes to addressing the pressing needs of their populations.

### *Must try harder: teachers cannot be hired with promises*

Even if all developing countries substantially increased their own education investments, they would need additional support to achieve the MDGs. Many good performers are already spending as much as 20% or more of their government budgets on education. This means that they are already up to the absolute limit of what they can finance from their existing budgets. As Ethiopia's Ministry of Education points out:

> *'In a country like Ethiopia, with a total population of over 65 million, achieving good quality universal primary education by 2015 will require a huge sum of money and other resources as well. Since the Ethiopian government is committed and has given it high priority, we will not defer this goal until sometime later. However the total resources requirement may be unbearable for such a poor country as Ethiopia. To achieve the targets set, the financing gap has to be filled. But, if additional money is not available, the targets will not be achieved' (GCE, 2005b:6).*

One would imagine then, that the international donor community would be eager to live up to its side of the promise made in Dakar and reiterated at major events since – that no country with a viable plan to achieve Education For All should be allowed to fail for lack of resources. However, aid to basic education in poor countries has increased only very modestly in the last five years, to about US$2.6 billion, representing just 6% of the total aid that is given (DFID, 2006). This leaves the international community at the very least US$5 billion (GCE, 2005b) and probably as much as US$10 billion (DFID, 2005) away from guaranteeing its share of the estimated annual costs of enabling all girls and boys to complete a primary education.

Despite their warm words and fine promises, donors are contributing tiny absolute sums to basic education in low-income countries. The G8 rich countries are particular culprits, contributing measly amounts compared to their Gross National Income. The US, for example, gives just US$1 per person per year to primary education in poor countries, comparing very poorly to the Netherlands, which gives US$9 per person per year.

### *Mozambique – struggling to maintain momentum*

Mozambique has made massive strides in education, doubling enrolment since the end of the civil war and reducing the barriers to girls entering school for the first time. Despite having received Fast Track Initiative endorsement as long ago as 2002, Mozambique's education system still requires external financing to the tune of just under US$300 million between now and 2008. This money will be urgently needed to reach over 1 million children who are out of school and bring the pupil–teacher ratio down from the current level of 70:1 (EFA-FTI, 2005; UNESCO, 2006a).

'In 2002, donor governments approved Mozambique's education plan, since then we have built 2000 new schools. Last year we dropped school enrolment fees, giving every child a chance to go to school. But there are still problems... Of those who do make it to school, most will not make it to

the secondary level. For girls, only one in three make it past 5th grade. This is not acceptable. We need 55,000 more teachers. Teachers are badly paid and often leave the profession for the private sector. We need to train more teachers, pay them higher salaries and build at least 6,000 new classrooms every year. To make this a reality, we need long-term predictable funding. Mozambique has seen very little of the money that G8 and European countries promised' Marta Cumbi, Mozambique Education For All Coalition (GCE, 2006).

The good news is that clearly defined mechanisms have been put in place to help deliver on the Dakar pledge. The Education For All Fast Track Initiative has laid down clear criteria for education plans and promised more and better aid to enable them to deliver their strategies. Now, increasing numbers of countries are coming forward to have their plans endorsed by this scheme, backed by the World Bank and most other donors. Within the next three years, up to 60 countries, accounting for 70% of the world's out-of-school children, could be reached through the scheme (EFA-FTI, 2005). The problem is that while poor countries have largely fulfilled their side of the contract, rich countries have reneged on theirs. The first 20 FTI-endorsed countries are still facing a collective shortfall of some US$540 million per year (EFA-FTI, 2006). As a result, around 16 million children who could be in school are still waiting at the school gates.

Over the next three years, the financing gap for these 20 countries alone will amount to just short of US$2 billion. Together, they represent approximately 15% of the world's out-of-school children. If FTI is to encourage others to come forward with ambitious plans, which will allow them to expand their teaching forces to the extent needed, it must ensure that all approved countries are given an upfront commitment to finance in full their immediate strategies.

**FTI: The missing millions and the missing teachers**

| Country | Year endorsed | Financing gap in US$ (millions) | Shortage of trained teachers (actual numbers) | Children not enrolled in primary school (net) |
|---|---|---|---|---|
| **Burkina Faso** | 2002 | 59.40 | 35,051 | 1,398,000 |
| **Guinea** | 2002 | 77.40 | 14,044 | 455,000 |
| **Guyana** | 2002 | -4.00 | 24 | 1,000 |
| **Honduras** | 2002 | 0.00 | 1,241 | 132,000 |
| **Mauritania** | 2002 | 18.60 | 3,399 | 145,000 |
| **Nicaragua** | 2002 | 73.20 | 1,887 | 124,000 |
| **Niger** | 2002 | 136.80 | 34,443 | 1,218,000 |
| **Gambia** | 2003 | 12.20 | 1,794 | 44,000 |
| **Mozambique** | 2003 | 290.70 | 41,305 | 1,171,000 |
| **Vietnam** | 2003 | 39.00 | 0 | 544,000 |
| **Yemen** | 2003 | 111.60 | *n/a* | 997,000 |
| **Ghana** | 2004 | -1.40 | 23,771 | 1,323,000 |
| **Ethiopia** | 2004 | 490.80 | 199,501 | 5,780,000 |
| **Madagascar** | 2005 | 186.30 | 16,038 | 511,000 |
| **Kenya** | 2005 | 314.60 | 77,858 | 2,030,000 |
| **Tajikistan** | 2005 | 69.40 | 0 | *n/a* |
| **Lesotho** | 2005 | 21.00 | 1,778 | 47,000 |
| **Djibouti** | 2005 | 36.00 | 1,525 | 74,000 |
| **Timor Leste** | 2005 | 17.90 | 159 | *n/a* |
| **Moldova** | 2005 | N/A | 0 | 53,000 |

(EFA-FTI, 2005; UNESCO, 2006a).

Investment in education should be seen as the soundest of all investments for a poor country. This is certainly the view of the Rt Hon Gordon Brown MP, UK Chancellor of the Exchequer, who recently observed:

> *'Education is the fundamental birthright of every child – empowering them for the future, putting opportunity directly into their hands – but it is also the very best anti-poverty strategy, the best economic development programme' (HM Treasury, 2005).*

But if countries cannot significantly increase their own spending on education and international donors do not live up to their promises, there is little possibility for countries to make progress on the education MDGs.

### *Following the money: quality counts*

At the World Conference on Education in Dakar in 2000, donors promised to respond to the needs of countries by making longer-term and more predictable commitments and being more accountable and transparent. They pledged to co-ordinate their efforts to provide flexible development assistance within the framework of sector-wide reform. These sentiments have also been echoed at subsequent international conferences and meetings.

Sadly, even a cursory examination of aid practice reveals that donors are failing to live up to these standards. Too much aid to education is not aligned with country needs and priorities, and is spent on expensive consultancies rather than core system costs. Eleven countries (Canada, Spain, Austria, Portugal, France, New Zealand, Austria, Germany, Italy, Belgium and the US) provide more than 70% of their aid to education in the form of technical assistance (GCE, 2005b). This means that, of the already paltry sums of aid available for education, as much as half of it may not be available for core service delivery costs, including teacher salaries. The tendency of donors, and the World Bank, to channel resources through discrete projects rather than supporting a single integrated education strategy has also contributed to a situation where countries are unable to finance the running costs of education.

### *Short-termism prevails: how World Bank lending has undermined the teaching profession*

The World Bank Operations Evaluation Department (OED) is currently undertaking an 'independent' evaluation of World Bank investments of US$10 billion in primary education worldwide since 1990. The OED is independent of senior management and reports directly to the World Bank Board and President. Reports produced for this big evaluation include a review of the World Bank Education Portfolio since 1990, a paper on determinants of education outcomes in developing countries and new evaluations of World Bank education projects in Mali, Pakistan, Peru and Romania. David Archer [Global Education Director at ActionAid International] has been following this evaluation as part of an external panel, which comments on how the World Bank has framed and conducted the evaluation:

'The elephant in the room in most Bank literature is teacher pay. The country reports carried out for the OED evaluation show how the pay, status and conditions of teachers have fallen in recent years. World Bank lending for education has not historically included recurrent costs such as teacher salaries even though this is what countries most desperately need.

'In Mali, for example, the OED evaluation notes the decline of the teaching profession and the emergence of contract teachers as one of the major "outcomes" of Bank support to education. The report notes that structural adjustment measures reduced the number of teachers and led to closure of teacher education institutions. A "Voluntary Departure" programme, supported by the Bank, also contributed to the loss of 12.5% of teachers. The study notes, approvingly, that the policy solution to this problem is to employ teachers on short-term contracts' (ActionAid International, 2006).

Countries embarking on major education reforms need to be able to count on donor funding for a period of five to ten years so that they can plan in confidence. The political problems associated with expanding the teaching force in the absence of such a guarantee could be immense. Very few donor countries will commit to this time horizon, needed to give governments this degree of confidence, making it impossible for them to make long-term plans. Unpredictability is also an issue, with much foreign aid 'arriving late or not at all' making it 'far less reliable than government revenues', according to a recent study (ActionAid International, 2005). In Zambia, it reports, late and incomplete releases of aid to the education sector have left large parts of the country's education strategy unimplemented.

> '*No prudent government will invest in training additional teachers unless there is an assurance of long-term financing to meet salaries... Donors need to keep to the promises that have already been made*' *(DFID, 2006).*

The UK government has recently recognised the critical role of predictability and, in early 2006, made a formal commitment to fund governments' education strategies over a ten-year period. This welcome step raises pressure on other rich country governments to follow suit.

### *The debt legacy*

The debt burden faced by many countries has continued to constrain their ability to hire enough teachers. Debt servicing has been a drain on countries' resources, especially their own recurrent funds that could be used to make up for donors' failure to finance such costs. And it has had a very direct impact on the capacity of countries to hire teachers – Zambia shelled out US$25 million more than it spent on education to the IMF alone for debt repayments in 2004. At the same time, 9,000 trained teachers were left on the streets because the government could not afford to take them onto the payroll.

In July 2005, G8 leaders endorsed a debt cancellation deal agreed by their finance ministers. This deal represented a serious step forward in ending the debt burden of the poorest countries. However, there is much further to go. The main challenge is to ensure that *every* country that needs this cancellation receives it *as soon as possible*. This means both widening the list of eligible countries, and abolishing the harmful conditions that eligible countries have to comply with to benefit from debt cancellation. Currently, many with massive debts are left out of the deal, such as Sri Lanka, Kenya, or Vietnam. The deal agreed covers just 18 countries initially at a cost of US$1.5 billion to rich countries each year. Although no new conditions were included in the G8 proposal, qualifying countries still have to complete the highly indebted poor countries (HIPC) process, which involves complying with harmful World Bank and IMF policy conditions and budget ceilings. Finally, the finance for this debt cancellation, although additional to the World Bank and IMF, will still be taken from rich countries' aid budgets and will be spread among all the poorest countries.

The need for debt cancellation to go further and deeper is emphasised by the fact that experience shows that money saved in debt service payments has been put to good effect in reducing poverty and increasing expenditure on education and health. Poverty reducing expenditures in African HIPC countries have increased on average 6% as a result of HIPC debt relief, and as much as 14% in some countries. Because debt relief represents a direct saving from central government expenditure, it is the equivalent of budget support and can be used for financing recurrent costs such as salaries. Furthermore, debt relief is guaranteed for 20 years, giving a predictable income allowing for long-term planning and recruitment of teachers.

#### *How debt relief can help*

In Benin, for 43% of HIPC debt relief went to Education in 2002, allowing the recruitment of teachers for empty posts in rural areas. In Malawi, HIPC resources have been used among other things to train 3600 new teachers a year.

### *Vicious circles: the role of conditionality and macro-economic prescriptions*

A further constraint on countries' ability to invest in recruiting and retaining sufficient numbers of professional teachers are the limits imposed on public spending as a result of IMF-advised fiscal policy. Concern to contain inflation to very low levels (typically between 5% and 10%) has led many countries to declare caps on the public sector wage bill. As teachers make up the largest group of public sector workers within countries, this has direct consequences for the profession: governments must either halt the hiring of new teachers or freeze the wages of existing teachers – in some cases both. Thus, while countries are on the one hand encouraged, even cajoled, by donors to upscale their efforts to achieve the Millennium Development Goals, on the other they are held back by narrow fiscal concerns promoted by the IMF.

In 2004 in Zambia, the IMF congratulated the government for taking a strong stand and 'limiting the wage bill to 8% and providing more room for...priority spending' – despite the fact that this move had left 9,000 trained teachers unemployed while the schools struggled with classes of over 70. It stated that 'the initial results of fiscal policy implementation were positive' (IMF, 2004). Absurdly, this suggests that paying primary school teachers is not 'priority spending' and that 9,000 teachers unemployed could be considered a 'positive' result of fiscal policy implementation. Yet this would contradict the statement of the resident representative of the IMF that '...if you're putting money into education but not providing teachers it won't work' (GCE, 2004). Despite being increasingly committed to Education For All and the other MDGs, the IMF continues to perceive wages and salaries as 'wasteful' expenditure. Unless it reverses this prejudice and shows greater fiscal flexibility, its commitment to poverty reduction is clearly discredited.

***Tied hands: the impact of IMF-advised wage caps***

In 2005, the government of Sierra Leone took the decision to decrease the public sector wage bill from 8.4% of GDP to 5.8% by 2008, as a result of IMF advice. Although an estimated 8,000 teachers were needed to help the country deal with a massive out-of-school population after the brutal civil war, only 3,000 could be hired in 2004.

An effort to reduce the public sector wage bill from 8.5% of GDP to 7.2% has resulted Kenya being forced to freeze teacher numbers at the 1998 level – despite having enrolled 1.3 million more students after the elimination of user fees (GCE/ActionAid, 2005a).

The effects of IMF advice and prescriptions are also felt beyond the sphere of national budget decisions. Other donors tend to follow the lead of the IMF where confidence in a country's development programme is concerned; where the IMF presses the 'off' switch on its programme, this sends a signal to other donors that a country is no longer trustworthy, and the other donors then suspend aid. Rwanda encountered this problem when the IMF suspended its Poverty Reduction and Growth Facility over a dispute about reducing the budget deficit, and several donors followed suit. According to the Rwandan Ministry of Finance, US$66 million was forfeited in the six months that followed – a sum equivalent to half the national budget. This phenomenon also significantly exacerbated the 2004 teacher recruitment crisis in Zambia, when donors cut off aid to all sectors, including education, following the IMF's suspension of the Poverty Reduction Growth Facility.

Nor is the Education For All FastTrack Initiative blameless in its influence over domestic decisions on appropriate policies to retain an effective teaching force. The mechanism used for assessing the viability of government plans – the Indicative Framework Benchmarking Tool – included an indicator that stipulated that the total teacher salary bill should not exceed 3.5 x per capita GDP. Under pressure, the Fast Track Initiative Secretariat has conceded that the indicator should not be a condition for endorsement. However, an analysis of those countries qualifying for support under the FTI shows that the indicator has a very strong influence on policy decisions. For example, following approval of their strategy, the Government of Niger froze the recruitment of civil service teachers and promoted system expansion with contract teachers at a lower salary level – a 'courageous reform', according to FTI Secretariat briefings (World Bank, 2004b).

The World Bank has clearly been instrumental in promoting just this approach to cost cutting, although its actual position (as represented in its published research and in the annual World Development Reports) is curiously schizophrenic. On the one hand, in their *World Development Report 2004* they clearly and explicitly recommend the use of 'para-teachers' – justifying their use on the grounds of greater community involvement, reduced costs and the apparent absence of conflict with teachers' unions:

> '*Madhya Pradesh, India, has seen substantial improvement in test scores, completion rates, and literacy. Community involvement is strong in recruiting teachers, getting new schools built, and encouraging neighbours to enrol their children. Parents have been helped by the ability to hire local, less-than-fully-trained teachers at a fraction of standard pay scales for government teachers—with better results. This last aspect of the program complicates scaling up. The ability to avoid confrontation with public sector unions has been a great advantage. Will teachers' unions allow such recruitment to become standard?' (World Bank, 2004a:72).*

On the other hand, the World Bank has published research from four countries: Togo, Peru, Ecuador and Indonesia (Alcázar et al, 2004), which plainly contradicts the World Development Report stance. This research concludes that the employment of 'contract teachers' has a direct causal link to a decline in the quality of teaching – due to reduced attractiveness of the profession, leading to lower quality applicants, and increased absenteeism as a result of fewer incentives and lower job security.

***Togo***

'...students of regular teachers systematically outperform those of contractual teachers, even after controlling for prior achievement, household-, school- and classroom characteristics. Variation in teaching methods, absenteeism, and resentment over "unfair" pay across contract types do not explain the performance gap. Instead, our findings suggest the reforms triggered a reduction in supply of high quality teacher entrants' (Vegas and De Laat, 2003:1). 'If, indeed, the negative effect of contractual teachers is mostly due to a decline in the quality of those choosing to enter teaching, the long-term negative effects of this policy change could be enormous' (Vegas and De Laat, 2003:25).

***Peru***

'There are two types of teachers in Peru's public education sector: regular ("*nombrados*") and non-regular ("*contratados*") [contract teachers]. The two regimes differ in important ways. In particular, while regular teachers enjoy very high job stability, non-regular teachers are hired for a specific period (normally a school year), and their contracts may or may not be renewed for the next period. In addition, regular teachers enjoy various benefits—including vacations, leaves of absence, and pensions—that non-regular teachers do not receive... non-tenured teachers were absent at significantly higher rates than tenured ones... Their higher absence rate... may reflect their low attachment to the post or lower expectations of staying in the job... If a contract teacher is uncertain about her continued employment, the optimal allocation of her time may include some income-earning efforts outside of school... Since the school has not made a long-term commitment to the teacher, the teacher may feel less attachment to the school, and less responsibility for the welfare of students' (Alcázar et al, 2004:12-37).

As can clearly be seen, donors and international financial institutions appear wilfully reluctant to absorb the truth that the major cost of achieving the education MDGs will be the cost of paying teachers. Yet the vast majority of poor countries face the same challenge: to achieve the education MDGs they must both increase the number of children in school and improve the quality of the education they receive. Professionally trained, well-motivated teachers are absolutely pivotal to them accomplishing this. All development partners should be working together to formulate realistic plans for reducing poverty, with teachers at the heart of them – so that every child can know a teacher.

The answer to the World Bank's question ('*Will teachers' unions allow such recruitment to become standard?')* is therefore very obviously a resounding 'no'. Teachers' unions will not, and should not, allow the recruitment of para- or contract teachers to become standard. Indeed Education International has been, and remains, one of the strongest opponents of the long-term use of such programmes.

### *Breaking the deadlock: teachers will deliver Education For All*

> *'We will have time to reach the Millennium Development Goals – worldwide and in most, or even all, individual countries – but only if we break with business as usual. We cannot win overnight. Success will require sustained action across the entire decade between now and the deadline. It takes time to train the teachers, nurses and engineers; to build the roads, schools and hospitals... So we must start now. We must more than double global development assistance over the next few years. Nothing less will help to achieve the Goals' (Kofi Annan, cited in United Nations, 2005).*

The Global Campaign for Education believes that every primary school child deserves to be taught by a qualified teacher in a class of no more than 40 pupils. In order to achieve this, a major effort by all stakeholders will be necessary to deliver a professionally trained, well-supported and highly motivated teacher workforce fit for the challenges of achieving Education For All. In particular, donors and international financial institutions must now, before it is too late, recognise the centrality of the teacher workforce to the entire EFA project and should work together with governments of poor countries to enable them to find, and keep, the teachers that children desperately need.

### *Summary of recommendations on the costs of quality teaching*

Poor country governments must:

- develop long-term and ambitious plans for achieving Education For All, including developing projections for year-on-year increase in teaching force to 2009 to accommodate all children in school and in classes of under 40 pupils
- allocate at least 3% of GDP to basic education and 20% of the budget to education
- abolish user fees in education while mobilising sufficient domestic and external finance to expand systems and improve quality
- work with teachers' unions to establish transition mechanisms so that within five years, untrained and contract teachers can be absorbed into the profession
- target national education plans at those most excluded from education, including girls, disabled children, or children from ethnic minorities, living with or affected by HIV & AIDS, or displaced or affected by conflict and/or natural disaster. Flexible education policies and dedicated resources are needed to ensure that difference and diversity are valued, that discrimination and prejudice are actively combated, and that gender, class and racial equality are promoted. Aid must be directed at supporting inclusion, which is the best strategy to achieve quality education for *all* children.

The IMF and World Bank must:

- encourage governments to develop long-term education strategies based on robust projections of human resource needs to enable all children to enter school and be taught in a class no more than 40 pupils
- work with governments and donors to ensure that poor countries are afforded the maximum fiscal space to enable the expansion of the teacher workforce
- formally rescind the 3.5 x per capita GDP indicator in the Education For All Fast Track Initiative framework.

Rich country governments must:

- meet the target of giving 0.7% of Gross National Income to assist poor countries and cancel unpayable debt of all poor countries
- allocate their 'fair share' of aid to basic education, allocating the majority of financing through the Education For All Fast Track Initiative
- fund recurrent costs and ensure predictability of aid over a ten-year time period
- support the Netherlands government proposal for reform of current FTI mechanisms to allow upfront commitments to forthcoming plans to be made
- promote abolition of user fees but ensure funds are sufficient to employ enough teachers to meet increased demand.

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