



# Teacher Mobility, 'Brain Drain', Labour Markets and Educational Resources in the Commonwealth

*by W. John Morgan, Amanda Sives and Simon Appleton*

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2006

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## **Acknowledgements**

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## Acronyms

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ANC	<i>African National Congress</i>
AJTUK	<i>Association of Jamaican Teachers in the United Kingdom</i>
APEK	<i>Association of Professional Educators of KwaZulu-Natal</i>
BERA	<i>Botswana Educational Research Association</i>
BGCSE	<i>Botswana General Certificate of Secondary Education</i>
CAPE	<i>Caribbean Advanced Proficiency Examination</i>
CARICOM	<i>Caribbean Community</i>
CSEC	<i>Caribbean Secondary Education Certificate</i>
COHSOD	<i>Council on Human and Social Development</i>
CHOGM	<i>Commonwealth Heads of Government Meeting</i>
Comm.Sec	<i>Commonwealth Secretariat</i>
CJSS	<i>Community Junior Secondary Schools</i>
CCEM	<i>Conference of Commonwealth Education Ministers</i>
DfES	<i>Department for Education and Skills</i>
DRB	<i>Designated Recommended Body</i>
DfID	<i>Department for International Development</i>
GTC	<i>General Teaching Council</i>
GCE	<i>Global Campaign for Education</i>
GNAT	<i>Grade Nine Achievement Test</i>
GTP	<i>Graduate Teacher Programme</i>
HEI	<i>Higher Education Institute</i>
HLTA	<i>Higher Level Teaching Assistant</i>
HSRC	<i>Human Sciences Research Council</i>
ILO	<i>International Labour Organization</i>
IMF	<i>International Monetary Fund</i>
IPPR	<i>Institute of Public Policy Research</i>
JC	<i>Junior Certificate</i>
JTA	<i>Jamaica Teachers' Association</i>
KZ-N	<i>KwaZulu-Natal</i>
LEA	<i>Local Education Authority</i>
LMS	<i>Local Management of Schools</i>
LSA	<i>Learning Support Assistant</i>
MOEYC	<i>Ministry of Education, Youth and Culture</i>
MoE	<i>Ministry of Education</i>
NASUWT	<i>National Association of Schoolmasters/Union of Women Teachers</i>
NQT	<i>Newly Qualified Teacher</i>
NSFAS	<i>National Student Financial Aid Scheme</i>
NYCBE	<i>New York City Board of Education</i>
NUT	<i>National Union of Teachers</i>
ODA	<i>Overseas Development Agency</i>
OTT	<i>Overseas Trained Teacher</i>
PARU	<i>Policy Analysis and Research Unit</i>
PPN	<i>Post Provisioning Norm</i>
PSL	<i>Preferred Suppliers List</i>
QTS	<i>Qualified Teacher Status</i>
REC	<i>Recruitment and Employment Confederation</i>
SSC	<i>Secondary School Certificate</i>
SACE	<i>South Africa Council of Educators</i>
SSA	<i>Statistics South Africa</i>

TBRS	<i>Teachers for Botswana Recruitment Scheme</i>
TDA	<i>Teacher Development Agency</i>
TES	<i>Times Education Supplement</i>
TRRU	<i>Teacher Recruitment and Retention Unit</i>
TSM	<i>Teacher Service Management</i>
TTA	<i>Teacher Training Agency</i>
UNDP	<i>United Nations Development Programme</i>
UNESCO	<i>United Nations Educational, Scientific and Cultural Organisation</i>
UNICEF	<i>United Nations International Children's Emergency Fund</i>
USAID	<i>United States Agency for International Development</i>
VSO	<i>Voluntary Service Overseas</i>
WB	<i>World Bank</i>

## **Currency Equivalents**

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<b>Jamaica:</b>	1 Jamaican dollar = 0.0105 British pounds
<b>South Africa:</b>	1 South African rand = 0.0810 British pounds
<b>Botswana:</b>	1 Botswana pula = 0.124 British pounds

Rates effective on 1st July 2003, as provided by <http://www.oanda.com/convert/classic> - accessed on 1st February 2006

## Executive Summary

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### The context

Education has been assigned a key role in strategies for poverty elimination, human development and economic growth in developing countries. Considerable donor funding is allocated for this purpose and ambitious targets have been set for universal primary education by 2015. However, achieving these goals may be complicated by one under-emphasised aspect of globalisation – the significant international flows of trained teachers. There has been a gap in knowledge of such movements and their implications for the achievement of strategic educational objectives. In the worst case, they may undermine the education sectors in developing countries through a ‘brain drain’ that allows developed countries to ‘free ride’ on the investments in training made by developing countries. This was a concern raised by Caribbean Ministers of Education at a retreat in July 2002. The result of the meeting, the *Savannah Accord*, called for more research to be undertaken on the issue. Following this, a report was commissioned by the Commonwealth Secretariat, undertaken by Kimberley Ochs and published in September 2003. It provided useful figures on recruitment of teachers and the experiences of overseas teachers working in the UK and led, at the 15th Conference of Commonwealth Education Ministers, to the establishment of a Commonwealth working group to develop a draft protocol on teaching recruitment. This was finally agreed on 1st September 2004 (see Appendix 1).

### The research objectives

The report builds on the work undertaken by Ochs and provides a set of detailed analyses to assist policy development. There are three key themes around which the project was developed. Exploration of these themes led to the development of policy recommendations.

The first aim was to ascertain the extent of international flows of trained teachers. Are certain states losing valuable trained manpower, while others are benefiting disproportionately from the output of other countries? Are these flows offset by significant reverse flows, which may indicate that sending countries benefit from the experience their teachers obtain abroad? How do such flows compare with those in related fields, especially health? Specific figures will enable policy-makers to assess the extent of the problem and to examine benefits and losses.

Secondly, the causes of such flows were examined, exploring the ‘push’ and ‘pull’ factors. What are the ‘supply side’ factors? For example, how do age or gender issues impact on teachers’ willingness to migrate? The report also discusses how the recruitment process works in practice. Are recruitment agencies, where they are involved, schools (in both sending and receiving countries) and overseas teachers satisfied with the process and outcomes?

Thirdly, the social consequences of these flows in developing countries were considered. Crucial here are the linkages between migrant teachers and their home country, in terms of remittances, return migration and other effects. We hypothesised, for instance, that a key social cost of teacher flows to source countries was the cost of training teachers that subsequently migrate. The implications of teacher flows for recruitment shortages and the delivery of education services in source countries was a key objective of the research.

Finally, the research developed policy responses and recommendations based on the findings. Details of these recommendations can be found at the end of the report.

## The methodology and methods

Because of constraints of time (an 18 month project, extended to 21 months because of the disruption of Hurricane Ivan) and resources, it was decided to focus on four case-study countries within the Commonwealth. These were identified as two 'sending' countries, namely Jamaica and South Africa, two of the most vocal countries at the 15th CCEM, and two 'receiving' countries, namely the United Kingdom (because of devolution, specifically England) and Botswana. This also gave the opportunity of looking at 'South-South' mobility as well as 'South-North' mobility. Academic research partners were identified for each country outside the United Kingdom and these are listed in the appendices. This framework, although limited, was designed to provide the most comprehensive comparative review given the constraints of time and resources.

The methodological framework was designed to explore the quantitative and qualitative impacts of teacher migration and teacher shortage. Through the variety of methods employed it was possible to explore the general impact of teacher migration and shortage on education systems as well as to investigate school and individual experiences. Questionnaires were given to samples of teachers who have moved from one part of the Commonwealth to another. They were circulated in conjunction with appropriate teacher unions and through web-sites. As well as helping to understand the process of teacher migration, the questionnaires asked about the remittances and other linkages that remain between the migrant teachers and their home countries. They asked also about teachers' career plans and specifically about the likelihood of return migration. Interviews and focus groups were conducted with those responsible for recruiting overseas teachers, with policy makers and with employers at the school and institution level, along with migrant teachers and fellow teachers.

The qualitative methods, developed through the school case studies and the responses of individual teachers (migrants and non-migrants), have highlighted the human impact of migration. This is reflected in the case studies and in published, conference and other dissemination outputs, through the inclusion of teacher voices, whether migrants, non-migrants or head teachers. The case studies provide clear examples of how individual head teachers and teachers have responded to migration and present a more complex picture of the impact than would have been gained through a larger-scale survey. The quantitative approach allowed us to develop the broader picture of migration and shortage in the case study countries. This was important in countries where no national data on shortages or on migration was available.

Each case study provides a detailed explanation of the specific methods used within each country. Through literature searches we aimed to capture the narratives that already exist about teacher migration and teacher shortages within the four countries. Grey literature searches were of particular relevance due to the lack of previous studies of teacher migration. Qualitative material was gathered through the case studies. Within each school, face-to-face interviews were conducted with head teachers (principals) or deputy head teachers (vice-principals). These semi-structured interviews revealed information about the general pressures affecting the schools (and how these

differed both within countries and between countries) as well as the specific issues regarding staffing levels and migration. Location (urban or rural), type of school (primary, secondary or special needs) and management of the school (government or private) were all factors that we were able to examine as a result of these in-depth discussions. Interviews with policy-makers, teacher associations, teacher trade unions, recruitment agencies and others involved in the process ensured that we were able to include the variety of experiences, views and positions of the key actors in the case studies and in the conclusions and recommendations presented.

Quantitative methods focused on the distribution of questionnaires to all teachers in each case study school (non-migrants, migrants, returned teachers). These questionnaires comprised closed questions, but there was an opportunity for teachers to comment on their experience of migration or their views on it. These open questions elicited a variety of different opinions that have proved to be a very rich source of informative qualitative data. Questionnaires were also distributed to trainee teachers in the sending countries that allowed us to explore levels of interest in migration by age, sex and academic teaching subject profile. Finally, a general survey was undertaken in each of the four countries to gain a wider understanding of the patterns of migration since 2000. Throughout, and especially when setting out recommendations for policy and for further research, an attempt has been made to draw comparative conclusions across the case studies and more widely. The detail to be found in each chapter varies according to the availability of data within each case study.

## The key findings

These are for each case study.

### **Sending countries: Jamaica**

- Mass recruitment of teachers to the United States and England was an issue of concern in Jamaica in 2001 and 2002 and led to the Jamaican government initiating dialogues with recruiting countries and at regional and multilateral levels.
- The Ministry of Education, Youth and Culture does not know precisely how many Jamaican teachers have migrated or how many have returned.
- The Jamaican government subsidises teacher training, paying approximately two-thirds of the costs.
- There is evidence that labour market planning within the system could be improved.
- Migration has had more of an impact at the secondary level than the primary level.
- The impact of teacher migration is qualitative rather than quantitative, although it does exacerbate the problems in pre-existing shortage subjects like mathematics and science.
- The main problem resulting from migration was the fact that experienced teachers were recruited and newly qualified teachers replaced them in the schools. The loss of qualified, experienced teachers is particularly problematic given the challenges faced by the Jamaican education system.
- Current incentives offered to attract people into teaching shortage subjects, such as mathematics, do not seem to be very successful, compounded by the fact that 50% of trainee mathematics teachers expressed interest in working abroad.

- Professional development and salary were the two main reasons given by Jamaican teachers for migrating to England. For returned teachers, salary and friends and family in the country were the key factors mentioned.
- Individual teachers benefit from higher salaries; on average, salary is three times higher in England than Jamaica. 93% of Jamaican teachers have taken advantage of professional development opportunities.
- 40% of Jamaican teachers currently in England plan to stay permanently.
- Jamaican teachers who are planning to return to Jamaica do not want to work as teachers, although 78% do want to work in an education-related field.
- Remittances and savings are significant at an average monthly rate of 9.47% of salary remitted and 13.07% saved.

### **Sending Countries: South Africa**

- South Africa is a large country with more than a third of a million educators. International recruitment of teachers would have to be on a very large scale to have a marked quantitative effect.
- Our national survey of trainee teachers showed 27% wanted to work abroad after qualifying and 48% of teachers in the schools visited also expressed an interest in working overseas.
- Among the schools visited in KwaZulu-Natal, teacher emigration was a major source of staff attrition, accounting for a third of staff attrition and came second as a cause of attrition only to movements to other South African schools.
- Schools formerly reserved for whites appeared disproportionately likely to lose staff to overseas. However, such schools tend to easily replace any losses, being attractive places for teachers to work and levying fees to enable the employment of additional teachers.
- Conversely, the most disadvantaged schools – predominantly African rural schools – appear less subject to international recruitment, as do former African schools in other areas.
- There is evidence of higher rates of international recruitment of teachers specialising in some subjects that are considered 'scarce subjects' in South Africa – notably the sciences.
- Shortages of staff appear more to do with bureaucratic delays in authorising appointments than lack of suitable candidates.
- There was evidence of qualitative impacts of international recruitment. Specifically, migrant teachers tended to be rated by head teachers as being of above average effectiveness.
- Responses from returned migrant teachers and trainee teachers implied stays overseas were typically short, at around two years. However, two fifths of South African teachers working in English schools did want to settle in the UK and the others planned to work abroad for a more medium term period.
- The modest duration of teachers' employment abroad suggests that concerns over the government having to fund the training of teachers who are lost to the system can be overstated.

- The private gains in nominal income obtained by migrant teachers are large – South Africans are able to earn three to four times more by teaching in the UK than by staying in their own country. Most migrants are able to repatriate significant sums from their stays overseas - around a third of their earnings.

## Receiving Countries: Botswana

- It is clear that expatriate teachers have made an important contribution to the development of the education system in Botswana, particularly in facilitating the rapid expansion of the secondary schools. They have contributed in a variety of ways: curriculum development, cultural exchange and support for local teachers.
- Teachers from developed countries, particularly Britain, have been an important source for the Botswana education system.
- The vast majority of teachers currently teaching in Botswana are from other developing countries and have been attracted to teaching in Botswana by the higher salary levels and opportunities for professional development.
- The level of international recruitment is declining but it is likely to continue in the shortage subjects for a number of years as local capacity continues to be developed.
- Expatriate teachers have tended to be male (63%), older (average age forty-two), experienced (average length of seventeen years) and well qualified (96% had a formal teaching qualification).
- Shortages have not impacted generally on the poorer schools, although there is limited evidence of problems in the remote rural schools.
- 27.5% of teachers working in Botswana do not plan to return home.
- Of those that do plan to go home to developing countries, only 10% want to work as a teacher, 22% in an education-related profession and 55% plan to be self-employed.
- Teachers from developing countries remit on average 18% of their salary and save 13%.

## Receiving countries: England

- There are no comprehensive figures on the numbers of overseas-trained teachers currently working in schools in England.
- Current shortages of teachers are at the secondary school level. Over half of the secondary schools visited and surveyed are experiencing shortages.
- The current employment of overseas-trained teachers is higher at the secondary level. There has been a decrease in the number of overseas-trained teachers working at the primary level since 2000.
- Our survey does not show a strong link between the poverty of the school and staff shortages
- 25% of schools have experienced a migration of British teachers since 2000. Two thirds of British teachers who have migrated worked at the secondary level. One third of schools that had experienced British teachers migrating, currently have staff shortages.

- 46% of British teachers who responded to our questionnaire were interested in migration. The figure differed between primary school teachers (37%) and secondary school teachers (53%).
- Overseas-trained teachers from Commonwealth countries are more numerous than those from Europe or North America.
- The profile of teachers migrating from developing and developed countries differs quite significantly. Teachers from developing countries are more likely to be male, aged between 31 and 40 years, have married, have children and have 6 – 10 years teaching experience. Teachers from developed countries are more likely to be female, aged between 21 and 30 years, unmarried, with no children, and have between 0 to 5 years teaching experience.
- The issue of Qualified Teacher Status causes frustration for overseas-trained teachers.
- Teachers from developing countries are moving for reasons of professional development and salary. Teachers from developed countries move for reasons of family and friendship connections and travel primarily.
- Teachers from developed countries plan to stay in England an average period of 6.7 years, whereas teachers from developing countries plan to teach in England for 3.4 years.
- 34% of teachers from developing countries plan to remain in England compared with 17% of teachers from developed countries.
- The percentage of teachers from developing countries who want to return home and work as teachers is low (28%), although a higher percentage want to work in an education-related field (69%). This compares with 73% of teachers from developed countries who plan to return to teaching.
- Teachers from developing countries remit an average of 8.2% of their salary and save an average of 14.28%.

## Conclusions

Teacher recruitment and mobility within the Commonwealth are complex and diverse phenomena. The project has explored them from different perspectives, with the conclusion that the effects on international development and poverty reduction are, on balance, positive rather than negative, chiefly because of remittances. The poverty impact through educational deprivation does not seem to be fundamental. Although there is evidence of effects on the quality of school teaching, there is no significant evidence of a persistent and damaging 'brain drain'. Receiving countries appear to be adjusting to short-term imbalances in supply and demand, with sending countries benefiting economically and through the potential for professional development.

The key issue is the collaborative management of the phenomenon by the countries involved, with the Commonwealth Teacher Protocol providing an excellent example of this. Essential to this is the collection and maintenance of data on international teacher mobility. This has been hard to come by and is recommended.

Such collaboration should be extended to specific schemes and programmes. For example, sending countries would benefit from expert advice (and funding) on the development of

management information systems for use within Ministries of Education and to develop bi-lateral or ideally multi-lateral frameworks for teacher training and professional development. This would ensure that teachers who work abroad do gain substantially from the experience and add value on their return. Countries involved in teacher recruitment are encouraged to develop such bi-lateral programmes and to be creative in their design.

The importance of teacher exchange should be noted and its development could be a cost-effective and benign contribution to the management of this process. Despite the differences between Commonwealth countries, this four-country study has highlighted the similar problems facing education systems e.g. under supply or over supply according to subject. The sharing of information and the development of common solutions would assist all countries that are facing, at least to some extent, similar problems. This is not to ignore significant differences between countries, which are explained by scale, different historical experiences and current and potential levels of development.

This research has focussed on only four countries. It would be interesting to see to what extent the findings can be generalised to other countries. For example, a study could be undertaken which examines the impact of the recruitment of Caribbean teachers to the United States. Australia would also provide an interesting example of a developed country that sends significant numbers of teachers to work overseas. This project has adopted a case study approach, often being obliged to conduct fieldwork on rather small and not statistically representative samples of schools. It would be interesting to see if some of the findings in the report could be generalised to larger, nationally representative samples. However, such research would be expensive. This research was also specific in time - it would be interesting to re-examine the issue in say five years time to see how it has evolved. Better administrative record keeping could go some way to improving knowledge of the issue.

Given the emphasis here on the qualitative effects of teacher mobility, it would be interesting to see if head teachers' ratings of teacher effectiveness was supported by more objective measures of effectiveness, for example, based around measures of teacher's contribution to students value added in terms of educational achievement. More generally, it would be interesting to see the extent to which teacher shortages and international recruitment directly impacted on learning outcomes for children - for example in examination performance or in international comparative tests. We would also welcome a more in-depth study that explores the special cultural contribution ascribed to teachers by virtue of their having come from overseas. This might include an investigation of the extent to which Jamaican teachers working in England and the United States can 'add value' when teaching children of Caribbean heritage. Again, given the project's inability to find significant numbers of returned migrant teachers in Jamaica, further research could be undertaken on the numbers and roles of returned teachers in order to determine exactly what impact they are having or could have on the Jamaican education system (whether in schools or administration). An exploration as to why Jamaican teachers who are planning to return to Jamaica do not want to return to teaching would also be of interest.

Although not focussed on international migration per se, one finding in all three developing countries visited was the problem of attracting good teachers to schools in remote areas. Research into the level and nature of the incentives that would be required to overcome this

problem would be welcome. Indeed perhaps the central finding of this project is that while teacher shortages do exist in some developing countries, these are not primarily attributable to international recruitment. Other domestic issues may be a higher priority for future policy research. Detailed policy recommendations and for further research are given in the appendices to the report.

The evidence gathered by this research will have resonance not only in Commonwealth countries but also more generally. The expansion of the General Agreement of Trade in Services (GATS) into the realm of education has been greeted with controversy. Mode 4 of the Agreement examines the movement of labour between consenting members indicating that teacher mobility will continue to be an important policy area within the general issue of the international labour market movement of qualified workers. The Deputy Secretary-General to the Commonwealth, Mr Winston Cox, echoed this in a speech on 30 March 2005, calling for an international trade and development approach to such migration.

## Introduction

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Teachers and schools are part of the social and cultural infrastructure of all societies, but are particularly essential in developing countries. However, such infrastructure, crucial to the goals of poverty reduction and the building of civil society, may be damaged and the goals of Jomtien and Dakar prevented by an under-emphasised aspect of globalisation. This is the significant international flow of trained teachers. While *ad hoc* teacher migration has been a feature of many Commonwealth countries for years, organised teacher recruitment on a south to north basis has been a relatively recent phenomenon. It dates from the late 1990s, reaching a peak during the early 2000s. In the Commonwealth, the United Kingdom, or more precisely England, has been the main recruiting country. While Australians and New Zealanders have been teaching in England for many years, the expansion of private supply agencies and the crisis in teacher recruitment led to the development of more organised mass recruitment overseas.

The main focus of the new market has been South Africa, but in recent years recruiters have also targeted the Caribbean. This has partly been in response to the demands of some Local Education Authorities (LEAs) which have requested teachers from the Caribbean who can reflect the heritage of their second and third generation British Caribbean students. This process, coupled with the recruitment of health workers, has placed pressures on the governments of these countries. The need to improve health and education services for their own development, as well as to meet internationally agreed goals, combined with the impact of increased migration, has led to a dilemma. It is argued that governments invest in training teachers (and health personnel) only for them to be recruited to work overseas, usually in a developed country where they can earn a much higher salary. Emotive language, such as ‘poaching’ and ‘raids’, has been used to describe such organised recruitment. The Commonwealth, comprised as it is of both recruiting and sending countries, has provided the arena within which some of these difficult debates have been explored and agreements reached. It has also provided the framework for this enquiry.

There is a gap in knowledge of these movements and their implications for educational objectives. In the worst case, these movements may undermine the education sectors in developing countries through a ‘brain drain’ that allows developed countries to benefit from the investments in training made by developing countries. This was a concern raised by Caribbean Ministers of Education at a retreat in Barbados in July 2002. The outcome of the meeting, the *Savannah Accord*, contained specific proposals for future action. These included: the need to conduct national research on teacher loss; the sharing of information on best practice; and the desirability of a cross- Commonwealth study of the issue. Finally, the Commonwealth Secretariat was mandated to draft a protocol for the recruitment of teachers in the Commonwealth. Consequently, the Commonwealth Secretariat published a short report, together with a copy of the *Accord*, in September 2003 (Ochs, 2003). It provided useful figures on recruitment of teachers and the experiences of overseas teachers working in the UK. This led, at the 15th Conference of Commonwealth Education Ministers (CCEM) at Edinburgh in September 2003, to the establishment of a Commonwealth working group to examine the issue further on behalf of ministers.

The group met in Lesotho in February 2004 and a draft protocol was prepared. The aim of the protocol, similar to the code of conduct for health workers, was to ensure that the process of

teacher recruitment between Commonwealth countries occurs in a manner that is beneficial to all parties concerned. Sending countries want to be informed when recruiters are planning a recruiting exercise, they prefer that recruitment does not disrupt their school year and that, where possible and feasible, bilateral agreements are signed. Recruiting countries would like to ensure that their recruitment process operates efficiently in conjunction with the source countries. It is hoped that the protocol will act as a guide for all those involved in the recruitment process and will assist in the development of best practice. One of the other aims is to develop a system of data collection which will ensure that Commonwealth countries have a clearer idea of how many teachers are migrating, where they are coming from and whether they are returning home. This is very important in determining the impact of teacher migration on both recruiting and sources countries. This process led ultimately to the adoption of the Commonwealth Protocol on Teacher Recruitment in September 2004 by all Commonwealth member states<sup>1</sup>.

The issue also attracted the interest of the United Kingdom's Department for International Development, which was concerned about the possible effect on its strategy towards capacity building and poverty reduction, as well as about ethical issues involved in open teacher recruitment. In October 2003, the Department commissioned the UNESCO Centre for Comparative Education Research (UCCER) (together with the School of Economics), at the University of Nottingham, to undertake research based on case studies. This project report seeks to contribute to the policy debate on teacher recruitment and retention within the Commonwealth described above, through the detailed analysis of the experiences of four Commonwealth countries: South Africa and Jamaica (as 'source' countries), the UK and Botswana (as 'recruiting' countries). The Project Team has worked closely throughout with: the Commonwealth Secretariat; research partners at the Botswana Educational Research Association; the University of Botswana; the University of Kwa-Zulu Natal; the University of the West Indies (Mona); the Commonwealth Policy Studies Unit; the Institute of Commonwealth Studies; High Commissions; the teacher trade unions, especially in England with the National Union of Teachers (NUT); the CONFED; and the recruitment agencies. Thanks are due also to the many individual teachers who participated in the research. A special mention also needs to be made of the members of the Advisory Group who gave their time, attention and advice to the team at crucial stages of the project. A list of the individuals who participated in the Advisory Group can be found in Appendix 2.

## The research objectives

The report builds on the work undertaken by Ochs and provides a set of detailed analyses to assist policy development. There are three key themes around which the project was developed. Exploration of these themes led to the development of policy recommendations.

First, our aim was to ascertain the extent of international flows of trained teachers. Are certain states losing valuable trained teachers, while others are benefiting disproportionately from the output of other countries? Are these flows offset by significant reverse flows, which may indicate that sending countries benefit from the experience their teachers obtain abroad? How do such flows compare with those in related fields, especially health? Specific figures will enable policy-makers to assess the extent of the problem and to examine benefits and losses.

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<sup>1</sup> Twenty-three government representatives were present at the final meeting. It had been agreed that those member states present at the meeting would adopt the protocol on behalf of all members of the Commonwealth.

Secondly, we examined the causes of such flows exploring the ‘push’ and ‘pull’ factors. What are the ‘supply side’ factors? For example, how do age or gender issues impact on teachers’ willingness to migrate? The report also discusses how the recruitment process works in practice. Are recruitment agencies, where they are involved, schools (in both sending and receiving countries) and overseas teachers satisfied with the process and outcomes?

Thirdly, what are the social consequences of these flows in developing countries? Crucial here are the linkages between migrant teachers and their home country, in terms of remittances, return migration and other effects. We hypothesised, for instance, that a key social cost of teacher flows to source countries was the cost of training teachers that subsequently migrate. The implications of teacher flows for recruitment shortages and the delivery of education services in source countries was a key objective of the research.

Finally, the research developed policy responses and recommendations based on the findings. Details of these recommendations can be found at the end of the report.

## The methodology and methods

Because of constraints of time (an eighteen month project, extended to twenty-one months because of the disruption of Hurricane Ivan) and resources, it was decided to focus on four case-study countries within the Commonwealth. These were identified as two ‘source’ countries, namely Jamaica and South Africa, two of the most vocal countries at the 15th CCEM, and two ‘recruiting’ countries, namely the United Kingdom (because of devolution, specifically England) and Botswana. This also gave the opportunity of looking at ‘South-South’, ‘South-North’ and ‘North-South’ mobility. Academic research partners were identified for each country outside the United Kingdom and these are listed in the appendices.

The methodological framework was designed to explore the qualitative and quantitative impacts of teacher migration and teacher shortage. Through the variety of methods employed it was possible to explore the general impact of teacher migration and shortage on education systems as well as to investigate school and individual experiences.

Literature searches allowed us to capture the evidence that already exist about teacher migration and teacher shortages within the four countries. Grey literature searches were of particular relevance due to the lack of previous studies of teacher migration.

Qualitative material was gathered through individual school case studies. Within each school, face-to-face interviews were conducted with head teachers (principals) or deputy head teachers (vice-principals). These semi-structured interviews revealed information about the general pressures affecting the schools (and these differed both within countries and between countries) as well as the specific issues regarding staffing levels and migration. Location (urban or rural), type of school (primary, secondary or special needs) and management of the school (government or private) were all factors that we were able to examine as a result of these in-depth discussions. These qualitative methods, developed through the school case studies and the responses of individual teachers (migrants and non-migrants) have highlighted the human impact of migration. This is reflected in published, conference and other dissemination outputs,

through the inclusion of teacher voices, whether migrants, non-migrants or head teachers. The school studies provide clear examples of how individual head teachers and teachers have responded to migration and present a more complex picture of the impact than would have been gained through a larger-scale survey. Interviews with policy-makers, teacher associations, teacher trade unions, recruitment agencies and others involved in the process ensured that we were able to include the variety of experiences, views and positions of the key actors in the case studies and in the conclusions and recommendations presented.

The quantitative approach allowed us to develop the broader picture of migration and shortage in the case study countries. This was important in countries where no national data on shortages or on migration was available. Quantitative methods focused on the distribution of questionnaires to all teachers in each case study school (non-migrants, migrants, returned teachers). They were also circulated in conjunction with appropriate teacher unions and through web-sites. As well as helping to understand the process of teacher migration, the questionnaires asked about the remittances and other linkages that remain between the migrant teachers and their home countries. They asked also about teachers' career plans and specifically about the likelihood of return migration. Whilst the majority of the questionnaire comprised closed questions, there was an opportunity for teachers to comment on their experience of migration or their views on it. These open questions elicited a variety of different opinions that have proved to be a very rich source of informative qualitative data. Questionnaires were also distributed to trainee teachers in the sending countries that allowed us to explore levels of interest in migration by age, sex and academic teaching subject profile. Finally, a general survey was undertaken in each of the four countries to gain a wider understanding of the patterns of migration since 2000.

Throughout the report, and especially when setting out recommendations for policy and for further research, an attempt has been made to draw comparative conclusions across the case studies and more widely. The detail to be found in each chapter of the main report varies according to the availability of data within each case study. Each chapter also contains an explanation of the methodology and methods used for the particular case study, as these were adapted according to objectives and circumstances.

## **Chapter 1: Sending Country: Jamaica**

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### **Introduction**

Jamaica, a small island state in the Caribbean, has a long history of migration. As a noted Jamaican expert, Professor Elizabeth Thomas-Hope (2002), points out, migration has been a feature of island life for generations, so much so that “the livelihoods of the migrants are not necessarily bound to one location, and people conduct different aspects of their lives in different places at different times in their lifecycle.” (Thomas-Hope, 2002:2). In a population of approximately 2.7 million people, Thomas-Hope has calculated that 814, 106 Jamaicans have migrated since the 1970s (Thomas-Hope 2004: 4). The advantages of migration are recognised within a society with a formal unemployment rate of 15% and where many people make a living in the informal economy. In 2004, Jamaica received US\$1.4 billion in remittances from migrants living and working overseas and this figure does not include the money sent back to the island informally through family and friends. However, in recent years concerns have been raised by the Jamaican government about the impact of the loss of skilled labour power on social and economic development. These concerns have been driven by the development of organised mass recruitment campaigns to recruit teachers and nurses, particularly by developed countries, most notably the United States and England. This chapter examines the impact of the teacher recruitment on nineteen schools in Jamaica.

The chapter begins with some details about the Jamaican education system. It continues with a brief discussion of the recruitment of teachers from Jamaica and the responses of the Jamaican government at the bilateral and multilateral level. Section Three introduces the data collection methods and includes a discussion of the existing data sources. Section Four presents our findings and discussion. Initially, we discuss the level of migration which has occurred since 2000 in the schools we visited. Based on information from the school principals, we present a profile of the teachers who migrated. This is complemented by an examination of the levels of interest in migration among Jamaican teachers and trainee teachers and is followed by a discussion as to the reasons why teachers migrate. The final section examines the costs and benefits of migration to the Jamaican education system, with a particular focus on its impact on the poorest schools.

### **1. The Jamaican education system<sup>2</sup>**

The Ministry responsible for education in Jamaica is the Ministry of Education, Youth and Culture (MOEYC). It has a regional administrative structure with six regional offices covering the fourteen parishes. The recruitment of teachers is undertaken at the school level by a Board of Management which is appointed by the school but ultimately responsible to the Ministry. Appointment of staff is subject to ministerial confirmation and employment contracts are between the Ministry and the individual teacher (Davis, 2004:70).

Jamaica attained universal primary enrolment during the 1990s (UNDP, 2004: 21) but the government continues to face difficulties providing sufficient places at the secondary level. The

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<sup>2</sup> It is important to note that changes in the structure of the MOEYC and the management of schools have been recently proposed by the Task Force on Educational Reform, chaired by Dr Rae Davis. The Task Force was appointed by the Prime Minister in February 2004 to “present an action plan consistent with a vision for the creation of a world-class education system which will generate the human capital and produce the skills necessary for Jamaican citizens to compete in the global economy” (Davis 2004: 8). The Task Force reported to the Prime Minister in September 2004.

National Report on Education, 2004 noted that: “[T]he challenge is to provide an adequate number of places for students at the upper secondary level” (MOEYC 2004). Minister of Education, Maxine Henry-Wilson stated in her September 2004 budget speech that coverage at the upper secondary level was at 76% (Budget Speech, June 2004). Recent statistical information from the MOEYC states that in 2003-4, there were 541,720 students enrolled in primary and secondary level schools.

**Table 1.1: Numbers of Students Enrolled, 2003- 2004**

Type of school	Male	Female	Total
Primary	94,517	93,440	187,957
All-Age (1-6)	35,532	31,515	67,047
Primary & Junior High (1-6)	23,036	23,731	49,767
All-Age (7-9)	8,535	3,924	12,459
Primary & Junior High (7-9/10)	14,929	8,976	23,905
Secondary High	85,531	96,712	182,243
Technical High	8,948	9,098	18,046
Agricultural High	174	122	296
<b>Total</b>	<b>274,202</b>	<b>267,518</b>	<b>541,720</b>

Source: Educational Digest, 2003-4. Statistics Section, MOEYC

There are different categories of schools within the primary and secondary level in Jamaica. Primary schools cater for children from Grades One to Grade Six. They do not charge fees. In the final grade, children take the Grade Six Achievement Test (GSAT). The results of this test are used to determine, along with parental choice, which secondary school children will attend<sup>3</sup>. There is a cost-sharing programme at the secondary level with government and parents paying a proportion of the school fees<sup>4</sup>. A ceiling is set by government and within that limit schools are free to set their fees. Parents can apply for additional assistance if they are unable to afford to pay their share of the school fees<sup>5</sup>. At Grade Nine, the children take a Grade Nine Achievement Test (GNAT) and at Grade Eleven, the Caribbean Secondary Education Certificate (CSEC) or the Secondary School Certificate<sup>6</sup> (SSC). If they continue in school education, they take the Caribbean Advanced Proficiency Examination (CAPE).

The All Age and the Primary & Junior High schools cater for children from Grade One through to Grade Nine/Ten. The All Age schools are predominantly based in the rural areas.

<sup>3</sup> Secondary high schools in Jamaica can be divided into two different categories although these are not reflected in the official figures. There are the 'traditional' high schools which have historically catered for the middle class and elite members of the society, have been well-resourced and are seen as the best government schools. The other category is the upgraded high school. Despite efforts by government to upgrade and equalise resources, there are still divisions between these schools. The Task Force Report highlighted that in the upgraded high schools only 4.7% of students achieved pass rates in Mathematics and 9.2% in English compared to 38 % and 55% respectively in the traditional high schools (Davis 2004:55).

<sup>4</sup> The current government had made a commitment during the 2002 election campaign to abolish school fees at the secondary level. However, following publication of the Task Force Report in September 2004, the Prime Minister announced in his 2005 budget speech that parents will continue paying school fees but they will be frozen at 02/03 levels. The full budget speech can be accessed at: <http://www.jis.gov.jm>

<sup>5</sup> Currently, 119,386 students receive fee assistance. Of those 25, 506 receive full assistance. (Prime Minister's Budget Speech 2005: 26).

<sup>6</sup> All students in upgraded secondary schools take the SSC. Students must achieve a grade four or five to be certified. In 2003, only 3.3% of students attained certification in Mathematics and 12% in general science (Davis 2004: 55).

Primary and Junior High Schools are All Age schools which have been upgraded. They cater for the same age range. Children who attend an All Age or Primary and Junior High also take the GNAT. If their marks are not sufficient to move to secondary school they will continue in the All Age or Primary & Junior High School. At Grade Nine, they have another opportunity to transfer to the secondary schools if they pass the GNAT.

The number of educational establishments in Jamaica in 2003-4 was as follows:

**Table 1.2: Number of Educational Establishments 2003-4**

Type of school	Number in 2003/2004
Infant	29
Primary	355
All-Age	349
Primary and Junior High	88
Junior High	1
Special	5
Secondary High	139
Technical High	14
Agricultural High	2

Source: Educational Digest, 2003-4. Statistics Section, MOEYC

There were 22, 400 teachers working in Jamaica at the primary and secondary level in 2003-4. The majority were female, although the percentage of male teachers was higher at the secondary level than the primary. There was a high percentage of trained teachers, although it is interesting to note that there were fewer trained teachers at the secondary level than the primary level. This is particularly interesting given that more secondary teachers have migrated than primary teachers. Those teachers that migrate to work as teachers have to have formal teaching qualifications.

**Table 1.3: Number of Teachers Employed**

	No. of Teachers	% Trained	% Male	% Female	Teacher-Pupil Ratio
Primary Level	10,500	88	11	89	1:34
Secondary Level	11,900	80	30	70	1:23

Teachers are trained in six teachers' colleges distributed around the island. Three other colleges also offer teacher training as does the University of West Indies. Whilst a variety of programmes are offered, the colleges concentrate on following a three year diploma programme. The University of the West Indies offers a degree in education as well as dedicated courses for teachers. As the table below highlights, there are various categories of teachers employed in Jamaica. Salary levels are dependent upon the category occupied.

**Table 1.4: Level of Training of Primary Level Teachers**

	Trained University Graduates	Untrained University Graduates	Trained College Graduates	Untrained Tertiary Level Graduates	Trained Instructors	Untrained Secondary School Graduates
Primary	1,072	29	4,528	77	11	565
All Age (1-6)	297	12	1,916	41	8	330
Primary & Junior High (1-6)	261	9	1,192	18	5	133
<b>Total</b>	<b>1,630</b>	<b>50</b>	<b>7,636</b>	<b>136</b>	<b>24</b>	<b>1,028</b>
<b>Percentage</b>	<b>15.5</b>	<b>0.4</b>	<b>72.7</b>	<b>1.3</b>	<b>0.2</b>	<b>9.8</b>

Source: Educational Digest, 2003-4. Statistics Section, MOEYC

This table highlights that 88% of primary school teachers have formal teacher training, either from university or college. However, nearly 10% have no tertiary level education or training.

**Table 1.5: Level of Training of Secondary Level Teachers**

	Trained University Graduates	Untrained University Graduates	Trained College Graduates	Untrained Tertiary Level Graduates	Trained Instructors	Untrained Secondary School Graduates
All Age (7-9)	154	4	411	27	2	61
Pr & Junior High (7-9/10)	256	20	705	52	15	81
Secondary High	2,761	806	4,160	678	265	458
Technical High	227	81	499	91	46	38
Agricultural High	7	1	12	11	3	2
<b>Total</b>	<b>3,405</b>	<b>912</b>	<b>5,787</b>	<b>859</b>	<b>331</b>	<b>640</b>
<b>Percentage</b>	<b>28.5</b>	<b>7.6</b>	<b>48.5</b>	<b>7.2</b>	<b>2.8</b>	<b>5.4</b>

Source: Educational Digest, 2003-4. Statistics Section, MOEYC

At the secondary level, 77% of teachers have some level of formal teacher training. The higher proportion of untrained university graduates at the secondary level may reflect the difficulties faced by the schools in finding trained teachers in certain subject areas. The lower percentage of teachers with secondary school level qualifications no doubt reflects the higher level of subject expertise required to teach in a secondary school.

## 2. Debates within Jamaica about teacher migration

This section examines the international recruitment process and the response of the Jamaican government.

### 2.1 The context of international recruitment

The organised recruitment of Jamaican teachers by both the United States<sup>7</sup> and England, through state boards and recruitment agencies, began in 2001. According to British recruitment agencies, their involvement in Jamaica was precipitated by two events. First, the announcement in August 2000, by the then Jamaican Minister of Education, Burchall Whiteman<sup>8</sup>, that approximately 300 teachers were to be made redundant (*Daily Gleaner*, August 24, 2000)<sup>9</sup>. Secondly, a number of Local Education Authorities in England that provided for children of Caribbean heritage approached the recruitment agencies because they were interested in recruiting Caribbean teachers.

The response to the advertisements by the US recruiters in the Jamaican media was overwhelming. In May 2001, it was reported that the New York City Board was in Jamaica with the aim of recruiting 640 teachers for two years starting August 2001<sup>10</sup>. The Director of Recruitment explained that there were shortages in New York due to the large number of teachers who were retiring. She added that there were particular shortages in elementary education, special education, reading, mathematics, Spanish, sciences and English as a second language. She also noted that Jamaican teachers were particularly sought as a high percentage of the students in the New York schools were from a Jamaican background (*Daily Gleaner*, May 25, 2001).

The initial response of the Ministry to this recruitment was to express confidence that “we will be able to cope with the situation” (*Daily Gleaner*, June 4, 2001). By July, the Ministry was advertising for teachers and other strategies were being considered such as part-time teaching and teaching across shifts. It was also proposed that more Cuban teachers could be recruited to fill some of the vacancies resulting from the migration<sup>11</sup>. According to newspaper reports, 350 teachers had actually been recruited from Jamaica to the USA, and between forty and fifty of them were mathematics and science teachers, while the others were elementary (primary) schoolteachers. Newspaper reports also stated that 150 teachers had been recruited for English schools during 2001<sup>12</sup>. The impact of the teacher migration received widespread coverage in

<sup>7</sup> This study does not cover the recruitment experiences of Jamaican teachers in the USA. Our information about the US recruitment practices is therefore gleaned from Jamaican-based sources (interviews and newspapers).

<sup>8</sup> The Minister stated that, according to calculations, some high schools were overstaffed by 578 teachers, while others were understaffed by 132. Primary schools were overstaffed by 565, while others were understaffed by 687. These calculations were based on a teacher-pupil ratio of 1:25 in high schools and 1:35 in primary schools (*Daily Gleaner*, August 24, 2000).

<sup>9</sup> Dr. Adolph Cameron of the Jamaica Teachers Association recalled that the teacher migration in 2001 was a direct result of the Government’s decision to ‘rationalise’ the teachers leading to “a lot of instability in the system... even the people who were principals and were secure in their jobs felt a sense of insecurity” (Interview, Adolph Cameron, September 2004).

<sup>10</sup> The recruitment team had previously been in Barbados and Trinidad and Tobago, although the Director of Recruitment noted that the number of applications in Jamaica exceeded that of the other islands.

<sup>11</sup> This proposal was condemned by Dr Adolph Cameron of the Jamaica Teachers Association (JTA), who argued that it was not simply a question of putting a person in front of the class because “that body may not have all the competencies to deliver the instructions that we want to be delivered for the children to benefit” (*Jamaica Observer*, August 21, 2001).

<sup>12</sup> The London borough of Brent informed the Ministry in October 2001 that it was interested in recruiting one hundred Jamaican teachers and was planning a recruitment visit in January 2002. Minister Whiteman, on a visit to England, held discussions with Brent LEA in which he informed them of the negative impact of recruitment during the school year (*Jamaica Observer*, April 25, 2002).

the Jamaican media. A report in the *Sunday Gleaner* found that “an unusually high number of schools are advertising to fill specialist positions” (*Sunday Gleaner*, September 2001). Coverage of the issue of teacher recruitment in the newspapers had declined considerably by 2003 and 2004 and officials from the Ministry of Education confirmed that teacher recruitment did not appear to have had a significant impact on the education system after 2002<sup>13</sup>.

## 2.2 The response

Dialogues were initiated on a number of different levels. In October 2001, Minister of Foreign Trade, Anthony Hylton was reported to be seeking negotiations with the UK and US governments about the teacher brain drain. Minister Whiteman had been quoted as suggesting that maybe Jamaica should “just train more local teachers to cover any numbers which may be recruited or ask recruiting countries to bear some of the costs of training them” (*Daily Gleaner*, July 26, 2001). At this early stage in the debates, the Jamaican government was floating the option of receiving some form of compensation for the loss of its teachers. ([www.migrationint.com.au/news/darwin/oct\\_2001-07mn.asp](http://www.migrationint.com.au/news/darwin/oct_2001-07mn.asp)).

At the Coolum Commonwealth Heads of Government Meeting (CHOGM) in March 2002, Jamaica proposed a discussion about the brain drain of teachers and nurses. According to the report, both Jamaica and Guyana had been badly affected by the drain of labour to both developed countries (in the case of Jamaica) and to developing countries (in the case of Guyana) (*Stabroek News*, March 4, 2002). In April 2, 2002, an article commented that the Foreign Minister and Education Minister were holding talks with the UK government about the recruitment of Jamaican teachers. The Foreign Minister said talks were at a very embryonic stage but the aim was to work out a “structured recruitment programme”.

Jamaica raised the issue of brain drain at the UK-Caribbean Forum held in Georgetown, April 5, where it was announced that the UK and European Union would fund a pilot study into the impact of the loss of skills on Caribbean economies. According to the report, the aim of the pilot study would be to “quantify the loss but also to see what could be done to attract back the skills that had been recruited from the Caribbean” (*Stabroek News*, April 5, 2002). The Guyanese Foreign Minister stated at the press conference that discussions had taken place about the “possibilities for further funding to establish programmes that would help to protect the Caribbean territories' investment in training people who are then recruited by developed countries” (*Stabroek News*, April 5, 2002).

In April 2002, the Caribbean Community (CARICOM) Council on Human and Social Development (COHSOD) agreed to work on the “development of a strategy for ‘managed migration’ with the training of professionals for export on a rotation basis” (*Stabroek News*, April 20, 2002). John Junor, Jamaica’s Minister for Health, had proposed this idea, arguing that recruitment was a reality so it was better to have a structured recruitment process so that

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<sup>13</sup> This is interesting given that the work permits given to teachers from Jamaica to work in England only slightly declined between 2002 and 2003. This may well reflect the decline in supply teacher recruitment or the fact that recruitment to the USA declined sharply in 2002- 3. We can only speculate on this as we did not undertake research on US recruitment from the Caribbean.

“governments would be able to plan for X percentage of doctors and nurses migration and look at innovative ways to allow this on a rotating basis, where professionals would go away for three years, or so, then return.” Junor remarked that Jamaica “was currently looking at the issue of managed migration and was in the process of implementing a pilot project that would assist in this regard” (*Stabroek News*, April 20, 2002). Within CARICOM, it was decided that the issue would be put before the Futures Policy Group for further discussion before being forwarded to the Heads of Government.

On April 25, 2002, it was reported that the Commonwealth Secretariat had offered to assist the Jamaican and other Caribbean governments to develop a protocol on skilled migration, especially teacher recruitment, for use within Commonwealth countries. Jamaica was a key participant in the discussions that led to the Savannah Accord and was also a member of the Commonwealth Working Group on Teacher Recruitment which led to the Commonwealth Protocol<sup>14</sup>.

Since 2002, the organised recruitment<sup>15</sup> of Jamaican teachers appears to have declined. Whiteman commented in 2002 that the bilateral negotiations he had held with the American and British recruiters had proved successful. In terms of England, the Minister explained that “although the London Boroughs had said they would have been recruiting more teachers in January [2002], the plan had not gone ahead after dialogue” (*Jamaica Observer*, April 25, 2002). The Minister also met the New York City Board of Education in 2002 and agreement was reached that it could recruit sixty<sup>16</sup> teachers, a tenth of the number it had been recruiting from around the Caribbean in 2001. According to a spokesman for the NYCBE, “We’ve decided to cap the number of foreign teachers we take. It’s a combination of not needing as many and wanting to be sensitive” (*The Times Educational Supplement*, January 18, 2002). The declining numbers of people being recruited in organised, mass recruitment drives may explain the comment made by Minister Henry-Wilson, the current Minister of Education, in January 2003: “I don’t believe that [teacher] recruits overseas leave us brain drained....It is not the first time that our professionals are going overseas and usually they return or maintain their links with Jamaica which enhances our human capital” (*Daily Gleaner*, February 11, 2003). In an interview with the project team, Minister Maxine Henry-Wilson stated that while she did not believe teacher migration was responsible for the shortages of teachers in specific subject areas, she did believe it was a factor.

Dialogues at bilateral and multilateral levels have continued and the current view within Jamaica is that the government needs to examine how to further develop its capacity to successfully manage and benefit from, the migration of its skilled professionals<sup>17</sup>. In line with

<sup>14</sup> The Protocol was signed in September and in an interview, Minister Henry-Wilson expressed the view that she hoped the protocol could be extended beyond the Commonwealth, and most specifically to the United States.

<sup>15</sup> It is important to record here that while the organised recruitment drives of the type seen in 2001 seem to have declined, recruitment continues. The 2001 drive highlighted to teachers that there was a need for teachers in overseas countries. It also ensured that teachers in Jamaica could find out from colleagues who had migrated whether there were any job opportunities. These informal networks are difficult to research but their importance should be considered. At the Commonwealth Meeting of Education Ministers in Stoke Rochford, the Minister of Education for Guyana raised the fact that the impact of informal recruitment and networks was a very important one for Guyana.

<sup>16</sup> However, there was no lack of interest among Jamaican teachers. According to an Observer report, six hundred teachers attended the recruitment event at the Hilton Hotel in January 2002 (*Jamaica Observer*, January 16, 2002).

<sup>17</sup> One of the Teacher Training Colleges in Jamaica is exploring the feasibility of offering a programme which would train teachers to be equipped for employment in the US market (Interview, September 2004).

this, the Commonwealth Secretariat is in the process of examining the feasibility of a 'managed migration' process.

### 3. Data collection

Data collection in Jamaica was facilitated by the School of Education, University of the West Indies. An independent consultant was contracted for the first field visit in September of 2004. Dr Sives and Professor Morgan visited the island during this period. Unfortunately, the fieldwork plans were severely disrupted by the arrival of Hurricane Ivan which hit the island the day after Dr Sives arrived in Kingston. The devastation wrought by Ivan led to the schools being closed for the first week of her two week research visit. It remained very difficult to visit schools during the second week as many were in the process of re-opening, registering students and undertaking damage assessment and repairs. It was only possible to visit three schools during this week. A second visit was planned for November 2004 and this took place without any disruptions. Before discussing the data collection process, the sources of existing data that deal with the issue of teacher migration in Jamaica will be examined briefly.

#### 3.1 Existing data sources

The Ministry of Education, Youth and Culture (MOEYC) in Jamaica did not have any statistical information regarding the numbers of teachers who had migrated from Jamaica. Teachers are not expected to give their reasons for resigning their post. Existing official data is therefore extremely limited.

A report produced by the Policy Analysis and Research Unit of the MOEYC found that 467<sup>18</sup> teachers had migrated in 2000-2001. This information was based on figures supplied to the MOEYC by three British recruitment agencies and one United States organisation<sup>19</sup> and on requests for 'status letters'<sup>20</sup> received by the MOEYC from teachers. The authors express their reservations about the completeness of the data based on the fact that they did not know how many recruitment agencies had visited and recruited teachers from Jamaica. They had no figures on the numbers of teachers who had applied directly to schools (online or in response to a traditional recruitment process) or teachers who had been recruited through other organisations (such as churches) (PARU 2002: 5)<sup>21</sup>. The Jamaica Teachers' Association (JTA) does not keep statistics on the numbers of teachers going abroad and the teacher training institutions do not keep a track on their graduates, although one of the colleges is currently establishing a process to collect information.

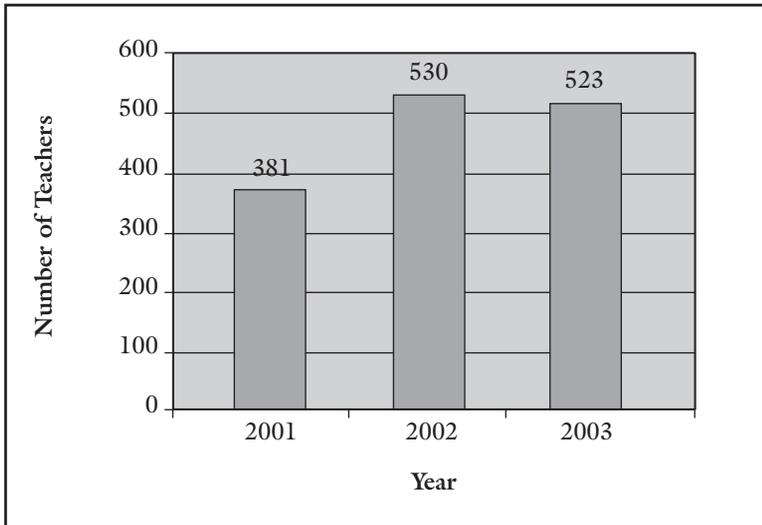
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<sup>18</sup> This is an underestimation as the *Gleaner* reported that 350 teachers had been recruited by the New York City Board and the official work permits given out by the UK to Jamaican teachers in 2001 was 381.

<sup>19</sup> Unfortunately, as the report highlighted, the potentially largest recruiter (New York City Board of Education) did not provide figures on the amount of teachers it had recruited.

<sup>20</sup> Status letters can be used for a variety of purposes and the request for one does not necessarily mean a teacher has been recruited. As the PARU report states "it appears that the majority of requests was for obtaining non-immigrant visas as well as for other reasons unrelated to travel." (PARU, 2002: 6).

<sup>21</sup> Added to this are the teachers who have become aware of teaching positions abroad through family and friends already living in the country.

**Figure 1.1** Jamaicans on Teaching Related Work Permits 2001 – 2003

Source: Work Permits UK

Within the UK, information held on the numbers of Jamaicans working in a teaching related profession can be accessed from Work Permits UK. This offers some insight but is not complete (please see the discussion in Chapter Four of this report). It can be seen here that there was an increase between 2001 and 2002 and that figures only slightly decreased in 2003. These figures refer only to work permits issued during the course of the year and do not include any renewals. Of the six recruitment agencies that were visited over the course of this project, only two had actively recruited<sup>22</sup> Jamaican teachers. Of these, one currently has 109 Jamaican teachers registered who are interested in migration, of whom twenty-two are currently working in England. Another forty-two Jamaicans worked for a second recruitment agency during 2004. A third agency estimated that they recruited two or three Jamaicans a year (they were not recruited as part of a campaign). There is clearly a high level of interest among Jamaicans to migrate. One agency stated, for example, that they had received 427 online requests for information from Jamaican teachers in the period 2003 – 2004.

All of the Jamaican teachers who responded to our questionnaire had work permits rather than other forms of entry (i.e. working holiday visas, spousal rights, ancestral rights or EU passports).

The only other information available on Jamaican teachers working outside the country comes from newspaper reports which were referred to in the previous section.

### 3.2 Data collected on school visits

Nineteen schools were visited in total over the course of the two field visits. The choice of schools was made following advice from our partners at the University of the West Indies. The

<sup>22</sup> 'Actively recruited' signifies that the agency visited the country to recruit teachers.

project team was keen to visit schools in urban, rural and remote rural locations and to ensure that primary and secondary schools were visited. As there was no existing data on which schools had been affected by migration, the sample of schools was not based on any pre-existing knowledge. The table below gives a breakdown of the schools visited:

**Table 1.6: Types of Schools Visited**

Type of school	Number visited
Urban Primary School	3
Rural Primary School	2
Remote Rural Primary School	1
Urban Secondary High School	7
Rural Secondary High School	2
Urban All Age School	1
Urban Primary & Junior High School	1
Private Urban Preparatory School	1
Private Urban High School	1
<b>Total</b>	<b>19</b>

Two urban locations and three rural locations were visited. There are clearly limitations with the data given the small number of schools it was possible to visit during the fieldwork. A representative sample was not obtained, but nevertheless, it is possible, using these nineteen case studies, to highlight some of the impacts of migration and teacher shortage that have been experienced at the school level in Jamaica since 2000.

In each school, an interview of up to one hour was held with the principal or deputy principal. Questionnaires were left with the principal to distribute to all staff.

### *Questionnaires from Jamaican Teachers*

There was a 38% response rate from teachers working in the nineteen schools. The questionnaires were collected after the project team had left the island and data entry was completed in Jamaica by the research assistant, Racquel Bremmer.

67% of teachers who responded worked in the secondary high schools, 21% worked in primary schools, 6.7% worked in an All Age school and 5.8% worked in a Primary and Junior High school. 80% of those who responded were female and 20% were male.

### *Questionnaires from Foreign Teachers*

Responses were received from five foreign teachers working in Jamaica. Four were Cubans who were part of the Jamaican-Cuban government programme and the fifth was British. The Cuban teachers taught Spanish, Science and Spanish, Information Technology and Music/Drama. It may well be that the Jamaican government had requested Cuban teachers to assist them to cover some of the shortages, i.e. Science and IT. The British teacher taught Humanities.

### 3.3 Survey data

300 schools in Jamaica were randomly sampled using the MOEYC Directory of Schools. 250 one-page surveys were sent out through the mail at the end of the first field visit. Fifty one-page surveys were subsequently emailed using addresses supplied in the MOEYC Directory. The low response rate may well have been connected to the disruption to the postal service as a result of the hurricane. The response to the email distribution was very poor and this was partly the result of the fact that many of the email addresses in the MOEYC Directory were bounced back.

**Table 1.7: Response Rates from Survey**

Type of school	Responses
Primary	20
Primary & Junior	1
All-Age	21
High	2
Special Needs	2
Private	2
<b>Total</b>	<b>50</b>

### 3.4 Returned teachers

The research located very few returned teachers working in Jamaica. Despite asking all those interviewed (including representatives of the Jamaica Teachers' Association, the Ministry of Education and the Teacher Colleges), it was very difficult to locate teachers who had taught abroad and were currently working, in any capacity, in Jamaica. An important explanation was put forward by all respondents when they were asked about the apparent lack of returned teachers on the island: it was suggested that it was too early in the migration cycle for Jamaican teachers to return. Given that the largest numbers of teachers left in 2001-2002, the view was expressed that they would not be returning to Jamaica for at least five to ten years. We will examine this view below when we look at the intentions of Jamaican teachers to return, who are working in England and who responded to our questionnaire.

The information that was gathered came from two sources: the school visits and the five questionnaires received from returned teachers (three as a result of the school visits and two online).

### 3.5 Trainee teachers

150 questionnaires were distributed in three teacher training institutions. 138 responses were collected, representing a 90% response rate. 85% of respondents were female and 15% were male. 18% were training to be primary teachers, 73% to be secondary teachers and 9% to be special needs teachers.

### 3.6 Jamaican teachers working in England

As Chapter Four (England) will discuss in more detail, a variety of channels was used to distribute questionnaires to overseas teachers working in England. From the 183 responses, sixteen were received from Jamaican teachers. 66% of the respondents were male and 34% were female. All teachers worked in secondary schools.

## 4. Findings and discussion

### 4.1 Extent of teacher migration and return since 2000

#### 4.1.1 Teacher migration from nineteen schools

Data collected from the nineteen schools visited revealed that overseas migration has affected the high schools far more than primary schools. Only one of the ten high schools visited had not experienced overseas migration compared to three of the seven primary schools. The table below compares the impact of overseas migration with other factors which have accounted for staff turnover since 2001. It highlights that overseas migration was the single most important reason for staff turnover in the nineteen schools visited.

**Table 1.8: Explanations for Staff Turnover**

Staff turnover	Primary	All-Age / P&J	Secondary	Private	Total
Sickness	0	0	1	1	2
Death	0	1	6	1	8
Overseas Migration	5	1	63	13	82
Move Job in Teaching	4	9	41	3	57
Moved outside of Teaching	1	0	12	1	14
Retired	5	5	10	1	21
Children/Family	1	1	4	0	6
Non-Renewal of Contract	3	0	3	7	13
Other	0	1	11	0	12
<b>Total</b>	<b>19</b>	<b>18</b>	<b>151</b>	<b>27</b>	<b>215</b>

If attrition rates for the four different types of schools are considered, the following percentages emerge.

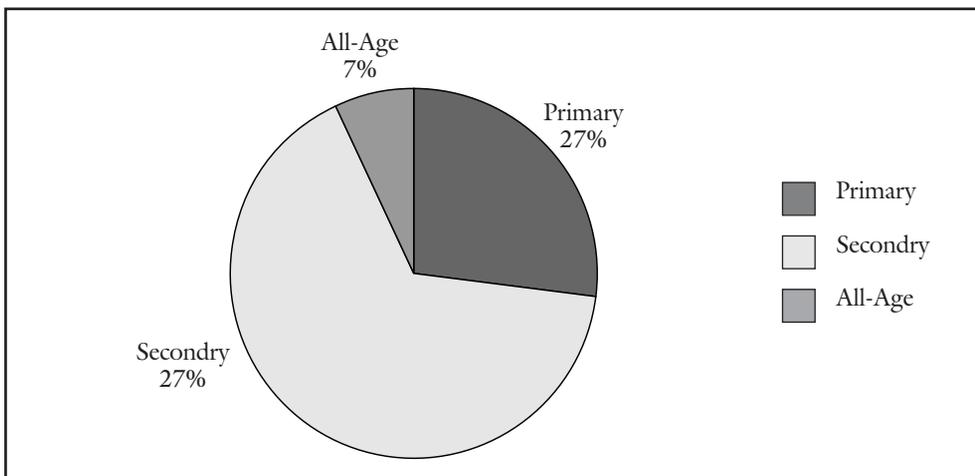
Table 1.9: Annual Average Attrition Rate

	Total staff	Total staff leaving 2000 - 2004	Staff leaving per year 2000 - 2004	Annual average attrition rate <sup>23</sup>
Primary	121	19	4.75	3.92%
Secondary	624	151	37.75	6%
All-Age, Primary and Junior High	75	18	4.5	6%
Private	63	27	6.75	10.7%

As can be seen above, the highest average annual attrition rate occurred in the private schools. Secondary and all-age schools had the same attrition rate and primary attrition was lowest. As only one all-age school/primary and junior high school was visited it is necessary to be cautious about these results.

Fourteen schools experienced teacher migration. Of these, three were primary schools (two government schools and one private school), one was an all-age school and ten were secondary schools (nine government schools and one private school). The figure below shows the percentage breakdown according to school type.

Figure 1.2 Experience of Migration by Type of School Visited



In terms of total staff migration, 92% of the staff who migrated were secondary school teachers, seven percent were primary teachers and one percent worked in an All-Age/ Primary & Junior High school.

Thirteen of the fourteen schools provided specific details on a total of sixty-two teachers that had migrated from their schools since 2000. The profiles of these teachers are examined below.

<sup>23</sup> This figure was reached by dividing the total amounts of staff migrating by 4 to give an average migration per year. This annual migration was divided by the total number of staff and multiplied by 100 to give an annual attrition rate.

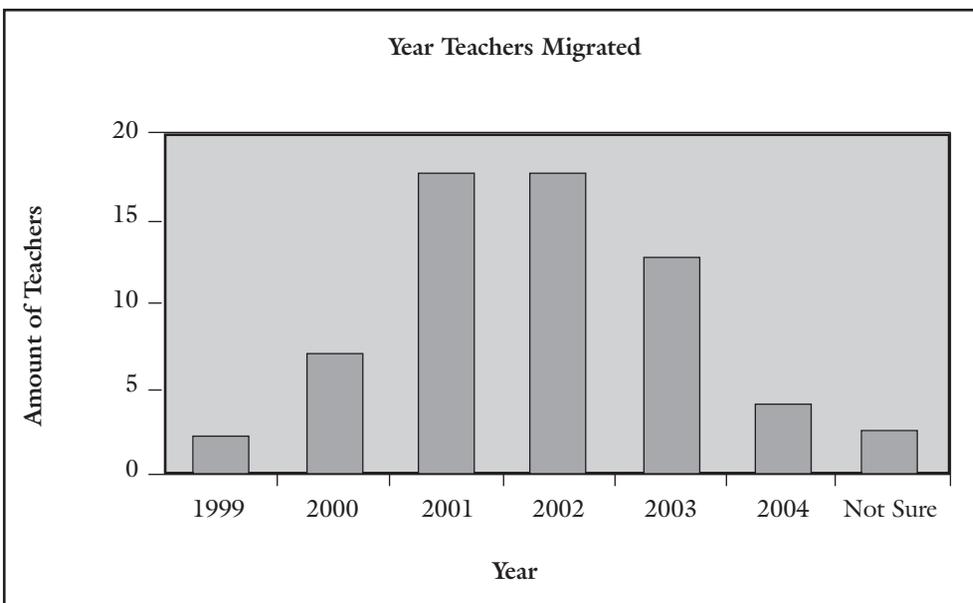
*Sex of migrant teachers*

In 2003-4, according to Ministry of Education figures, 89% of primary level teachers and 70% of the secondary schools teachers were female. Given that the majority of the migrant teachers were secondary school teachers, our figures represent the gender division within the profession as a whole. In total, 71% of the teachers who migrated from the schools we visited were female, compared to 29% males.

*Year when migrant teachers left Jamaica*

As the figure below highlights, the experience of the schools visited confirms the general view that the peak years of teacher recruitment were in 2001 and 2002. As the fieldwork occurred in November 2004, the data is not complete for 2004 but it is highly unlikely that significant numbers of teachers would have been recruited at this point (September and November) in the school year.

**Figure 1.3 Year Teachers Migrated from Jamaica**



*Subjects taught by the migrant teachers*

The table below highlights that the largest group of subject specialists to leave the island was that of teachers of English, followed by teachers of Mathematics. The comparative lack of Science, Information Technology and Design and Technology teachers leaving is unexpected, as it does not tally with the shortage subjects experienced by schools in England.

Table 1.10: Subjects Taught by Migrant Teachers

Subject	Number of teachers migrating
English	13
Mathematics	12
Other	8
Primary	6
Other languages	5
Physical Education	4
Science	4
Design and Technology	2
Information Technology	2
Religious Education	4
Commerce	1
Social Studies	1
Music	1
English & Religious Education	1
English & Humanities	1

### *Destinations of the Jamaican teachers*

At the schools we visited we found that almost equal numbers of Jamaican teachers went to England (42%) as to the USA (45%). This is surprising given that newspaper reports and anecdotal evidence suggest that far larger numbers of teachers have gone to the United States than to any other country<sup>24</sup>. Other destinations mentioned were Canada (8%) and the Cayman Islands (5%).

### *Level of experience*

Forty two of the teachers were classroom teachers, twelve were senior teachers and eight were heads of departments or vice principals. However, principals recalled that all of the teachers who left the school were 'seasoned' teachers, i.e. those with a wealth of experience. Eight of the sixty-three teachers left during the school year, leaving two schools with some difficulty finding replacements. One principal recalled a senior teacher leaving the school a week before term started and in another school, a PE teacher had resigned a week after school began. In some cases, principals explained that teachers had left because their husbands had obtained employment abroad and in another case, a husband and wife team had gone to the United States to look after their parents. It is important to note that there are a variety of reasons why teachers migrate.

#### **4.1.2 The wider migration process**

In order to understand the wider migration process, 300 one-page surveys were sent out to a random sample of Jamaican schools. Fifty responses were received from the 300 surveys distributed: a response rate of seventeen percent. The vast majority (82%) were received from primary and all-age schools.

<sup>24</sup> Unfortunately we are unable to comment on recruitment to the United States.

Of the twenty-one all-age schools that responded, eight had experienced overseas migration since 2000, teachers had migrated from six of the primary schools and only one of the two high schools that responded had experienced migration. Only one of these schools (a primary school) was in an urban area. The table below shows a break down of the year when the teacher left and the numbers of teachers who migrated.

**Table 1.11: Response to the Survey by School Type**

School type	2000	2001	2002	2003	2004	Total
Primary	3	2	7	2	0	14
All-Age	2	5	2	4	0	13
High	0	0	0	1	0	1
Total	5	7	9	7	0	28

The lack of response from the secondary high schools does not allow specific comments about the wider migration patterns of teachers from Jamaican secondary schools. It should also be noted that 90% of the responses were from rural schools and, as the data from the school visits highlighted, teacher migration has been more prevalent in the schools located in the urban areas.

#### 4.1.3 Levels of interest in migration from Jamaican teachers and trainee teachers

As well as examining the migration that has already taken place, the study asked teachers and trainee teachers about their interest in migrating. This information is important in giving an insight into possible future migration patterns, although it is recognised that what is being discussed is interest in, rather than actual, migration plans.

##### *Jamaican teachers in Jamaica*

54.8% of the teachers expressed a positive interest in working overseas whilst 45.2% said they were not interested. Of those who expressed a positive interest, 19.5% had actively sought work overseas and 80.5% had not. The table below shows the breakdown of interest of teachers migrating dependent on the type of school in which they work. There is no significant difference in interest when all schools are compared.

**Table 1.12: Interest in Migration and School Type**

School Type	Interested in working overseas		Total
	Yes	No	
Primary	33	29	62
Secondary	115	96	211
All-Age	12	9	21
Primary & Junior High	11	7	18
Total	171	141	312

If the interest of Jamaican teachers to migrate by their subject specialism is examined, it can be seen that teachers in the main shortage subjects (Mathematics, Science, and Information

Technology) did express an interest in migration. This is particularly noticeable in science where 60% of teachers were interested in teaching overseas, and Information Technology, with 85% of teachers expressing a positive response. Interest in migration is also high among English and Language teachers.

While a positive interest in migration does not signal actual movement, it does highlight a level of latent attraction amongst teachers which could be sparked into action by a mass recruitment drive (as was seen on the island in 2001) or by changes in working conditions or job security (as was also seen in 2000). The fact that 20% of teachers had actively sought employment abroad highlights the fact that many teachers have serious intentions to migrate.

### *Trainee teachers*

Another question was the extent to which people might be training to teach in order to migrate?<sup>25</sup>.

Of the 135 respondents, 62% said their aim was to teach in Jamaica at the end of their course, compared to 33% who expressed an interest in teaching abroad. 4% said they did not want to enter teaching at all and 2% said they would like to teach in Jamaica or teach abroad. None of the teachers have actively sought work overseas. However, the questionnaire was administered in October 2004, just after teachers will have started the academic year and before they would be actively seeking employment.

If the responses are broken down by type of school teacher, it is seen that the percentage interested in teaching abroad is very similar across the schools: primary (32%), secondary (33%) and special needs (27%).

**Table 1.13: Intentions of Trainee Teachers**

School	Plans at the end of the Course				Total
	Teach in Jamaica	Teach Abroad	Either Option	Not enter Teaching	
Primary	13	7	1	1	22
Secondary	56	29	3	1	89
Special Needs	8	3	0	0	11
<b>Total</b>	<b>77</b>	<b>39</b>	<b>4</b>	<b>2</b>	<b>122</b>

Secondary school (trainee) teachers, who are more likely to be recruited to work abroad - based on demand for subject specialists in England and our own research which highlights that more secondary school teachers have been recruited than primary teachers - vary in their plans to migrate depending on their subject specialism. Table 1.13 gives details on the intentions of Jamaica teachers by subject specialism. For the Jamaican government, the worrying factor is that more than 50% of trainee mathematics teachers are interested in working abroad. This is of particular concern given that pass rates in the CSEC mathematics exam are low compared to the regional average (World Bank, 2004: 108). In addition, sufficient numbers of mathematics and science teachers are not being trained. The Government of Jamaica does give incentives to students who study to be mathematics teachers but, according to Dr Claude Packer, of Mico

<sup>25</sup> This was an issue that arose during the South African fieldwork (see Chapter Three).

Teacher Training College, the strategy does not seem to be increasing the number of teachers training at his institution. Allied with the shortages of teachers training in the scarce subjects of Mathematics and Science, there appear to be weaknesses in the overall system of labour market planning for the teaching profession<sup>26</sup>. This leads to a situation where principals of teacher training colleges do not know how many subject specialists they should be training in order to meet the demand of the local market.

**Table 1.14: Intentions of Trainee Teachers by Subject Specialism**

School	Plans at the end of the Course				Total
	Teach in Jamaica	Teach Abroad	Either Option	Not enter Teaching	
Maths	5	7	0	0	12
English	9	6	0	1	16
Science	14	4	0	0	18
Humanities	4	1	1	0	6
Information Technology	1	1	0	0	2
Art/Craft	2	0	0	0	2
Home Sciences	1	0	0	0	1
Languages	1	1	0	0	2
Religious Education	0	2	0	1	3
Economics	1	1	0	0	2
Other	6	0	0	1	7
Social Studies	8	2	0	0	10
<b>Total</b>	<b>52</b>	<b>25</b>	<b>1</b>	<b>3</b>	<b>81</b>

#### 4.1.4 Returning and planning to return

##### *Profile of those teachers that have returned*

Four of the five respondents were women; four described themselves as black and the fifth as mixed race. Two were secondary school teachers and three were primary teachers. The two secondary schools teachers taught English and PE. All were employed as teachers before they went to work abroad, one in a temporary position and three in permanent employment. Apart from one person, who worked for four years as a teacher, the others were very experienced having taught between seventeen and twenty-three years. Three of the teachers had teaching diplomas, one had a degree and two had Masters' degrees. One teacher had returned in 1998, one in 2001 and two in 2004. Two teachers had worked in the USA, one in Britain and two in other Caribbean territories (Turks and Caicos, British Virgin Islands).

##### *Intentions of those Jamaicans working in England*

Given the lack of information from teachers who have returned, the intentions of those Jamaican teachers currently working in England, who responded to the questionnaire, are now

<sup>26</sup> This information is based on interviews undertaken with the principals of two teacher training colleges in Kingston and from interviews with MOEYC officials in September and November 2004.

considered. All said that they did not intend to return home after the end of their current contract. Asked about their long term intentions, 40% said they wanted to remain in England permanently, leaving 60% who are committed to returning home (one did not respond). The median length of time people wanted to remain was seven years. But within this, 33.3% of those who plan to return home indicated they would like to remain for ten years. The responses to this question from migrant teachers supports the assertion that those teachers who migrated in 2000-2001 are likely to still be working overseas and explains the lack of returned teachers.

## 4.2 Reasons given for migration and return

### *Jamaican teachers working in England*

There were sixteen responses from Jamaican teachers working in England. 66% of the responses were from males, their average age was thirty-four and they had been working an average of ten and a half years. 93% were classroom teachers. They all had work permits and 87% were employed without qualified teacher status (see Chapter Four for an explanation of the English Qualified Teacher Status (QTS)).

Jamaicans working in England cited professional development (14), salary (13) and travel (13) as the most important reasons for migrating. Only nine people<sup>27</sup> actually ranked their reasons for migrating in order. The top preferences recorded were salary and professional development (both were recorded by four people). Three people said travel and professional development were their second preference. It is not surprising that the combination of salary and professional development were the most important reasons cited by Jamaican teachers to work in England. As one Jamaican teacher wrote: “It is still economically better. Opportunities for further study are easier to access. They [Jamaican teachers] are better able to contribute to their families back home”.

### *Returned teachers*

Four returned teachers cited salary as their main reason for migration, followed by three who gave the reason that family and friends were already living in the country. Professional development ranks in third place. Only four of the teachers rated their preferences. The fifth person ticked salary and travel as their reasons for migrating. The importance of family and friends abroad is the most cited top preference of the return teachers followed by the desire for professional development. Salary is still an important second preference. Whilst this information can give an insight the small sample size precludes us being able to make wider generalisations about the returned teacher reasons for migration.

### *Trainee teachers reasons for wanting to migrate*

Trainee teachers cited salary (34), professional development (21) and travel (18) as their most important reasons for migration. This was followed by family and friends in the country (18),

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<sup>27</sup> One person cited just one reason.

better social services (16) and better working conditions (12). Of those who expressed their first, second and third preferences, salary was by far the most important preference listed. It is important to note that many of those undertaking training courses have worked as teachers in Jamaica and are undertaking further training. They will therefore have first hand experience of salary issues and are perhaps more inclined to undertake further professional development

The issue of salary was commented on by many trainee teachers. As one noted “My view is that teachers have needs. Their bills need to be paid and as a teacher, at the end of the day, I would like to see what I am working for”. Another one wrote: “The salary is much too low for the work being done. Teachers need to make a sacrifice for their country but how well can they sacrifice if they can’t pay their bills! The international recruitment of teachers gives teachers an avenue for them to improve their standard of living”. In addition to the reasons why trainee teachers wanted to migrate, it was asked whether the possibility of migration had been an incentive for people to train as teachers? Of those who expressed an interest in working overseas, 27% said that migration had been an incentive for them to train, whereas 73% said it had not been an incentive. Therefore, only 9% of the total sample said migration had been an incentive for them to train as a teacher.

### 4.3 Impact of migration on the education system

#### 4.3.1 Costs of training teachers in Jamaica

No formal economic costing has been done on teacher training in Jamaica. However, the MOEYC did make available cost-sharing figures for the 2004 – 2005 period. These figures highlight the Jamaican government’s financial contribution to the cost of teacher training at the colleges (six of these colleges focus solely on teacher training). The government also give scholarships to teachers of J\$17,413.

Table 1.15: Costs of Teacher Training

College	Government J\$	Student fees JS (per annum – per student)
Mico	154,700	59,000
Shortwood	101,411	58,700
St. Joseph’s	54,590	42,660
Church Teachers’ College	56,693	42,550
Sam Sharpe	70,605	53,286
Moneague College	87,771	61,420
Bethlehem Moravian College	73,898	62,686
College of Agriculture, Science and Education	168,551	59,500

Source: MOEYC, May 2005

Teachers trained at the University of the West Indies currently pay \$121,583 J\$. This is 20% of the costs of training.

### 4.3.2 Shortage of teachers and migration

As discussed in section 4.1.1, the most important factor affecting exit from the teaching profession, based on school experience, was overseas migration. In this section the impact on the schools of staff shortages is examined.

#### *Shortages reported in the schools visited*

As the table below highlights, only three high schools and one primary school stated they had current staff shortages. Of the three high schools, only one had experienced staff shortages in the past. Two other high schools stated they had experienced staff shortages in the past but were not experiencing problems at the moment. Five high schools, six primary schools and one private school, twelve of the nineteen schools (63%) visited, reported that they had never experienced staff shortages. Two schools reported they were overstaffed based on the teacher-pupil ratio<sup>28</sup>.

#### *Subject shortages*

Despite only three of the schools saying there was a definite lack of candidates for teacher vacancies, seven high schools reported that they had experienced problems attracting candidates in a number of subject areas. The subjects schools experienced most problems attracting candidates to teach were: Mathematics (5) and Science (4). Two schools mentioned they had difficulty finding suitably qualified candidates to teach Music, other Languages and Construction. The difficulty of attracting guidance counsellors was mentioned by two schools. Art and Craft, Physical Education, Commerce were mentioned by one school and one primary school had difficulty attracting suitable candidates.

Mathematics and Science were the subjects that most schools had difficulty filling with suitable candidates. One of the principals said that shortages of mathematics teachers had been a particular problem – the school had been forced to appoint a person trained in economics and accounts because no mathematics teachers had applied for the position. In the private high school, the principal said that he had had to ask the computer teacher to come back to the school because he had been unable to find a suitable replacement. He had also had problems recruiting for mathematics and science. In a rural high school there was a shortage of vocational teachers so the retired woodcraft teacher had been asked to return. A principal of an urban high school said that while there are candidates in mathematics and science, they are not good enough. However, the school has little choice but to take them. A principal from an urban high school pointed to problems in the recruitment of mathematics and science teachers (especially physics teachers).

#### *Jamaican teachers' views of shortages*

Teachers in the schools visited were asked whether they believed the school suffered from staff shortages? A third (31%) of the 328 teachers that responded felt their school did suffer from a shortage of teachers. However, only 6% said migration had been a major factor in the shortage

<sup>28</sup> One said this was because violence had affected children's attendance at the school – hence pupil numbers had declined. However, another principal said while, according to the teacher-pupil ration they appeared overstaffed, this did not take account of the need for specific subject teachers as a result of the Reform of Secondary Education (ROSE) curriculum.

of staff in their school. 26% of them did not believe the shortage was the result of migration, 42% felt migration had a minor impact and 25% said it had a partial impact. In total, 73% of those who said their school was experiencing shortages believed that migration had some impact on the staff shortages in their school, but the majority thought the impact was minor.

### *Staff shortages in the context of other factors*

When asked to place staffing levels among other priorities affecting the school, it was given a low priority by the principals. Only two of the schools rated an insufficient number of teachers as an issue facing the school and then only as their third priority. None of the schools rated lack of trained teachers as a priority issue when compared to other factors. However, what this highlights is the range and extent of problems facing the Jamaican education system. In this context of poor resources, the need to ensure the employment of qualified, experienced and committed teachers is of even more importance. The table below places the issue of staffing within the general context of educational priorities as outlined by the principals:

**Table 1.16: Priorities Identified by the School Principal**

Issue/ Level	Top Priority	Second Priority	Third Priority	Fourth Priority	Least Priority	No Priority
Lack of books/materials	7	5	1	0	0	6
Difficult Physical Environment	5	5	1	0	0	8
Insufficient teachers	0	0	2	0	0	17
Insufficiently trained teachers	0	0	0	0	0	19
Other	7	5	5	1	0	1

In terms of other issues raised by the principals, six schools mentioned the impact of violence on the children. Five of these schools were in the inner city areas or had an intake of students who lived in violence-prone areas and the sixth was in a rural area<sup>29</sup>. Violence had caused two of the schools to close down due to shooting in the vicinity of the school; it had impacted upon enrolment levels and had caused disruption for children<sup>30</sup>. One principal explained that the school had closed down several times during 2004 due to violence, attendance had been affected because some children were frightened to come to school and the some of the children had been traumatised. A primary school principal explained that her school was near a violence-prone area. The school ran an early morning reading programme but many children were unable to attend because they did not want to leave their homes early in the morning. Another high school in an inner city area had moved from double shift schooling to single shift because of the

<sup>29</sup> This school had an incident while the interview with the principal was taking place. A young man forced his way on to the school compound looking for a student that he said had 'dissed (disrespected)' his sister.

<sup>30</sup> Newspaper reports testify to the impact of violence on education in the inner city areas. In May, 2004 for example, it was reported that several students who were due to take their Caribbean Examination Council exams were trapped in their homes due to gunfire (*Daily Gleaner*, May 28, 2004). Policemen were drafted in to escort students to attend GSAT exams in March 2005 due to violence. (*Daily Gleaner*, March 17, 2005). Also see articles in the *Caribbean Journal of Education*, Vol. 23, No1 & 2, pp 99 – 152.

violence in order to encourage children to come to school<sup>31</sup>(this would ensure that children were not in areas where violence was more likely to occur during the early morning and late afternoon periods).

The poverty levels of the parents were mentioned by five of the principals. This had an impact on attendance, on the ability of students to pay for transportation, lunch, shoes and uniforms. One principal stated that he has difficulty getting fees from the parents. As he explained the “bursar has to keep chasing it up which is very time-consuming”. Another principal explained that they are unable to ask the parents for a voluntary contribution as: “the majority are not working and rather than the school receiving assistance from the parents, it is the other way around”. She went on to explain that the school runs a breakfast and lunch programme to encourage the children to attend. Other issues noted by the principals included: lack of computer facilities (two schools), lack of parental/community involvement (two schools), lack of playing space (two schools), children’s attitudes (one private school), lack of general resources (two schools).

### *Methods of coping with shortages*

Five of the principals said they had asked existing staff to teach outside of their subject specialism as a way of dealing with shortages. Four principals had increased the size of their classes and two had employed foreign teachers. One school had dropped the subject from the curriculum and one school (the private high school) had asked the part-time teachers to teach more hours.

What is particularly worrying, in terms of the impact of migration on the quality of education received by the children, is the number of schools that have coped with shortages by asking teachers to teach outside their subject area<sup>32</sup>. The lack of expertise in the subject particularly for children facing examinations is troubling. While we cannot argue there is a direct correlation between a lack of subject specialist knowledge and poor pass rates in the Caribbean Secondary Certificate (CSEC), particularly in mathematics, English and science, there is little doubt that the quality of education the children receive from a non-specialist teacher is going to be less than from an experienced, fully-qualified teacher. Similarly, the schools that increased class sizes as a coping strategy will undoubtedly experience a decline in the quality of the education they can provide for the children. Four of the nineteen schools admitted that staff shortages had a direct bearing on the quality of education they believed they had been able to provide. One principal explained that the quality of education is compromised because the classes are too large so the children do not get sufficient individual attention. Another principal stated that the quality of teaching declined when the teacher was teaching outside their subject area.

Two traditional high schools employed extra teachers and paid them from school funds. All the high schools have the right to ask parents for a voluntary contribution. Those schools with a middle class student base are able to ask for relatively high contributions that allow them to buy extra equipment, build laboratories or recruit extra staff. Two schools employed foreign teachers

<sup>31</sup> The principal explained that there was not enough furniture for all the children but the technical studies teacher was welding broken chairs and tables.

<sup>32</sup> For example, one school asked their music teacher to teach drama.

through the Jamaica-Cuba bilateral programme. One traditional high school employed three teachers from India to teach mathematics and science. The principal explained that she had recruited the teachers directly having been told about them by an Indian colleague. She had interviewed the teachers over the telephone. The principal stated that it was not difficult getting the work permits and teachers themselves organised and paid for their work permit<sup>33</sup>. The other traditional high school employed foreign teachers but they had been recruited through normal recruitment methods. She explained they had been appointed because they were the best candidates.

### 4.3.3 Migration and poverty: Impacts at the school level

#### *Defining the poorest schools*

The extent to which teacher migration is impacting on the poorest in society is difficult to gauge. One possible method is to examine in more detail the schools that are losing teachers to migration. As discussed in the previous section of this report, government and parents fees fund Jamaican high schools. Entry into the schools is dependent on pass rates at the GSAT exam and parental choice. There are no catchment area restrictions so it is not the case that schools which are located in the poorer zones of the urban area necessarily cater to the children of poorer families. Schools in the rural areas, cater for children who live in the local area. The rural areas are poor<sup>34</sup>.

Each principal visited was asked to classify their school against the average in other urban and rural schools with regard to their levels of poverty. In the rural areas, two schools reported being much poorer than average, two poorer than average and one was average. In the urban area, no schools defined themselves as much poorer, two as poorer and nine classified themselves as average. One (the private high school) reported itself as much less poor than average. In the urban area, 75% of schools classified themselves as of average poverty. This reflects the mix of pupils that enter the schools but it is important to note that the historically traditional high schools tend to cater predominantly to the children of the middle class<sup>35</sup>. These schools charge the maximum fees, as allowed by government, and only accept children with higher pass marks at the GSAT. As the principal of an inner city school remarked, "if the children have lower grades, they will come to this sort of school. Those with the higher grades go to the traditional high schools". Children of poorer families clearly do get higher grades and enter the traditional high schools but it is more likely that they will enter the reclassified high schools and the inner city schools in the urban area. This can be assessed further by examining the drop out rates (and the reasons for dropouts) as estimated by the principals of the high schools.

In five of the schools (four traditional high schools and one rural high school), the drop out rate was negligible – estimated between zero and 1%. However, in three schools it was 5%, one

<sup>33</sup> Dr Adolph Cameron explained to the project team that the MOEYC asks the JTA to approve the work permits, although he is not sure whether those that are not approved by the JTA are actually rejected (Interview, Dr Cameron).

<sup>34</sup> As UNICEF notes, children account for 43% of all the poor in Jamaica, most of whom are in the rural areas (<http://www.unicef.org/infobycountry/jamaica.html>).

<sup>35</sup> Errol Graham of the World Bank in Jamaica explained that the best high schools are in the urban areas, many of them have corporate donors and the parents are more affluent'. This was clear in one of the traditional high schools visited where it was clear that new schools buildings had been constructed from funding from wealthy past students. I was also told that middle class parents pay for their children to attend private primary schools so that they get high marks in their GSAT and can then attend the better secondary schools (Interview, Errol Graham, November 2004).

school 8% and one school 15%. Reasons given for these drop-out rates were: economic (parents could not afford transportation costs, lunch money, shoes, etc) or social (high levels of violence in the area or pregnancy). The highest drop out rate was in the area where there were high levels of violence – also an area with social and economic deprivation<sup>36</sup>.

From the information gathered, it is possible to state that schools in the rural areas, the reclassified high school and the schools in the inner city urban areas are those that are more likely to cater for the poorer students.

### *Impact of migration at the school level*

Those schools visited likely to cater for the poorest students have been defined. Whether it is these schools that have been affected by the migration of staff is now examined. In the table below, the type of school is listed against the number of staff lost to overseas migration since 2000.

**Table 1.17: Impact of Migration on School Type**

Type of School	Total number of staff	Total number migrated 2000 -2004	Annual average % attrition rate through migration
Urban Traditional High School (319)	74	20	6.7
Urban Private High School (305)	37	12	8.1
Urban Reclassified High School (303)	50	10	5
Urban Traditional High School (314)	97	9	2.3
Inner City High School (306)	37	5	3.3
Rural High School (307)	60	5	2
Urban Traditional High School (302)	80	5	1.5
Urban Traditional High School (316)	31	4	3.2
Rural High School (309)	54	3	1.3
Urban Primary School (312)	27	3	2.7
Urban Primary School (310)	41	2	1.2
Inner City High School (318)	65	2	0.7
Inner City All-Age School (311)	29	1	0.8
Urban Private Primary School (301)	26	1	0.9

The table above highlights the fact that the private school had the highest attrition rates of all the schools visited. However, it is necessary to be cautious about making any generalisations as only two private schools were visited (one preparatory and one secondary school). Urban

<sup>36</sup> This was confirmed in a recent UNICEF report entitled 'Situation Analysis of Jamaican Children'. Published in 2005 the report stated that more than 11,000, or 6.8%, of Jamaican children between 12 and 16 are not enrolled in school. The majority of non-enrolled children were males, lived in rural areas and were poor. The report also found that the children of wealthier parents are three times more likely to be enrolled in school at age 18 than the poorest (Daily Gleaner, February 2005).

traditional high schools<sup>37</sup> have high attrition rates due to migration as does the reclassified high school.

The impact of the migration was not seen as a major problem, even in the school where the largest number of teachers had migrated. However, the principal was new to the school and had not had to personally cope with the large number of departures. He had learned from other staff members that a major problem was that migrating teachers did not give the principal sufficient notice of leaving, making it difficult for the school to find adequate replacements before the start of term. Two other school principals, one from a traditional high school and the other from an inner city school, expressed the same frustrations. Generally, it did not seem to be the case that there were problems finding replacements, rather it was the short time scale the principals had to do it. Three schools did mention they had specific problems replacing the teachers who had migrated. One private preparatory school had found it difficult to replace a senior teacher who had migrated. One rural high school had experienced difficulty initially but had managed to organise replacements and an urban traditional high school principal said they had to juggle the staff around until they could find a suitable replacement.

Other issues related to migration were noted. The principal of the reclassified high school was particularly irritated by the fact that he had lost two excellent teachers – one in accounts and the other in history – to migration. He said the teachers had inspired the children and significantly increased the examination pass rates. Their loss was keenly felt. He also expressed his annoyance at staff who had gone on study leave abroad and not come back.

Another question was whether the poorest schools indirectly experienced an impact from migration? This was important because it could be the case that staff leave the poorer schools to fill the vacancies created by overseas migration from the better-resourced schools. The principals were therefore asked what the replacement teachers had been doing before they were employed in their school?

The responses suggest that this is not happening as seven of the principals said they had replaced the migrants with newly qualified teachers. Four of the replacements had worked in similar schools and two were already working in the school on a temporary basis. Only one replacement teacher had come from a poorer school. These figures suggest there does not appear to be a movement of teachers around the high school system as a result of overseas migration. The principal who had recruited a teacher from a poorer school was the principal of the private school. The definite trend seemed to be for newly qualified teachers despite all of the principals remarking that these teachers needed a great deal of support and were not as effective initially as the teacher who had migrated.

One explanation for this preference for newly qualified teachers seems to be related to the divisions which exist within the high school system. As one principal of a traditional high school commented, the culture of the non-traditional high schools was different and she felt those teachers would not 'fit' in the traditional schools. Staff turnover is very low in the inner city schools<sup>38</sup>.

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<sup>37</sup> There was a view among some principals that the recruitment agencies were aware of which were the 'good' schools in Jamaica and were keen to recruit teachers from them.

<sup>38</sup> As a principal in an inner city school stated teachers form strong bonds with the children many of whom had experienced traumatic incidents in their lives as a result of violence or economic hardship. She described her teaching staff as a family and said everyone is distressed when experienced, long-serving teachers leave the school.

### *The qualitative impact of migration*

Schools may not have reported staff shortages as a key priority area but the detailed comments from the principals highlight that this is a qualitative and not just a quantitative issue. Schools want to appoint a good teacher not just a teacher who is able to teach the subject. As one principal commented, regarding the appointment of a mathematics teacher, the candidates for the job were not very good but the school had to appoint someone in order to fill the vacancy. Another principal of a traditional high school said: “So while a school can get a body, the quality is not the same”. The principal of a reclassified high school was annoyed that he had lost an excellent accounts teacher to migration and he had great difficulty replacing him. With the loss of skilled, experienced teachers through migration, the pool of candidates to choose from is, in the short term, going to be of a lesser quality.

In order to assess the qualitative impact of teacher migration, we asked the principals to comment on the teachers they recruited to fill the gaps caused by staff migrating overseas. Principals reported that nearly half (48%) of the teachers who replaced the migrant teachers were either slightly less effective or less effective. This can partly be explained by the fact that migrant teachers were replaced by newly qualified teachers who did not have the experience of the migrant teachers. The principals said that in the majority of subject areas, there were plenty of candidates but nearly all of them were newly qualified. As one principal from an inner city high school stated: “It is not a brain drain, because we can replace teachers who are leaving; but we can only replace the knowledge not the experience”.

On the positive side, 32% of the replacements were as effective, suggesting no negative impact in teaching quality as a result of migration. Seven teachers (11%) were judged to be better than those they had replaced. It is also important to mention here that many good teachers have remained in Jamaica. The debate that has developed in Jamaica has tended to suggest that recruiters have recruited the ‘best’ teachers. As one teacher still working in Jamaica stated: ‘It is being said that the crème of the teachers, crème de la crème as it were, have migrated. Thus the remaining teachers are regarded as substandard. This has cast a shadow on the teachers who are patriotic/ dedicated [but who] feel undermined and unappreciated. This attitude has affected the morale of the teaching profession’.

However, it is important to note that the issue is not just one of teaching quality. Migration of teachers can have other impacts on the school. One principal mentioned the fact that children develop strong bonds to their teachers and are often upset when the teacher leaves. This is particularly the case for the children whose lives are unstable whether because of economic issues, the experience of living in violent communities or because their own parents have migrated<sup>39</sup>. There can be a psychological impact on the children which can be very disruptive to their learning processes. This is particularly important during examination periods.

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<sup>39</sup> This is an important strand of Jamaican life. Children whose parents have migrated are known as ‘barrel children’ because their parents send them barrels of goods from abroad (Crawford-Brown, 2002) It was an issue mentioned by one primary principal in an inner city school. We do not know to what extent teachers have children or have migrated with their children.

#### 4.3.4 Benefits of migration and return to the education system

In the next section of the report the financial benefits of teacher migration for individual teachers is considered. Also, albeit on limited evidence, we assess whether the returned teachers 'add value' to the education system as a result of their period of teaching abroad. However, before discussing this, it is important to note that an additional positive factor was raised by principals. It was mentioned several times that the migration of teachers had freed up positions within the system for new teachers to enter the profession and for more experienced teachers to seek promotion. Teachers also mentioned this as one of the benefits associated with migration. One teacher stated: "Without this [migration], new teachers would not get a job. Members from my graduate batch (2003) are still without jobs". Thus migration not only ensured that trained teachers were able to gain employment but that teachers who had been within the system for a number of years were encouraged to stay by the prospect of new challenges. This was clearly a positive factor in the subject areas where principals were faced with a choice of suitably qualified candidates. In the shortage subject areas, these advantages were not in evidence.

##### *Individual teacher benefits*

It is clear from the figures that we collected that teachers working in England earn, on average, three times the salary they were earning in Jamaica (although clearly, the cost of living is higher). As one teacher pointed out there is: "Too much tax, cost of living too high, no benefits for Jamaican taxpayers". The average monthly salary before leaving Jamaica was £433.75 and the average monthly salary on starting in England was £1283.33. However, in general, Jamaican teachers highlighted the financial benefits of working in England. Two principals interviewed during the research said they had encouraged some of their teachers to migrate for financial reasons. A vice-principal of a rural high school stated that if she knew a young teacher wanted to migrate she would encourage them: 'The salary of a young graduate teacher is JM\$ 28,000 (approximately £280) per month. If you have a house and family it is impossible to support yourself on the salary. The financial gain is huge and many teachers want to save money so they can come back and buy a house.' The principal of a private secondary school said he 'even encouraged one of his teachers to migrate as she was in her forties, with an old car and living in a rented house'.

Teachers had also gained through professional development. 94% of teachers had undergone formal professional development. The school had paid for 57% of the courses, while 43% of teachers had paid for their own professional development. Only 7% of teachers said the courses they had taken were not relevant for their teaching practice back home. 67% said the courses had been relevant or very relevant and 27% said they had been fair. Overall, professional development undertaken in England is, in the view of the teachers, relevant for the Jamaican education system.

##### *Added value*

If teachers do return to work in the education sector in their home country, with added value due to professional development and experience gained working abroad, the source country

education system should benefit. As Minister Maxine Henry-Wilson stated in an interview with the authors '[B]ut to me the most important thing for us is to see if we can find a way to return to the system persons who have had that experience' (Interview, September 2004). Due to the lack of returned teachers in Jamaica, it is very difficult to assess whether their extra experience has benefited the education system. Based on the limited evidence gleaned from the school visits, there was little consensus about whether returned teachers made an extra contribution. Six of the nineteen schools (32%) had experience of employing a returned teacher (either currently or in the past). Of those, only two said the returned teachers had contributed anything extra to the school. Two said that the overseas experience had been a positive factor during the recruitment process, two said it had not and two of the principals could not comment because they had not been involved in the recruitment process.

### *Experiences of the returned teachers*

Of the five teachers identified who had returned to Jamaica, three returned to teaching, one was working in an education-related job and a third was in higher education. They are contributing to the Jamaican education system following a period abroad. Four of the teachers had undertaken professional development while working abroad. Three of these teachers rated the professional experience as very relevant or relevant for their teaching in Jamaica and one said it was quite relevant. Therefore, we can surmise that teachers are 'adding value' to the education system upon their return. This view is confirmed if we consider the reasons why teachers migrated or are interested in migration: professional development was one of the key motivating factors.

### *Jamaican teachers in England*

However, when the intentions of those Jamaicans who expressed their desire to return home after their period working overseas are examined, it is found that none indicated that they wanted to return to teaching<sup>40</sup>. 78% of those who plan to return stated they wanted to work in another education related field, but not as a teacher in a school. One person said s/he wanted to work outside of education and another expressed a desire to be self-employed. Whilst these are the preferences of teachers now, and might not reflect what actually occurs upon their return, it does suggest that overseas migration in this case has led to a permanent loss of teachers to the school system, even if they remain within the education-related employment field.

#### **4.3.5 Migration and economic development**

One of the key arguments made in favour of migration is the extent to which remittances from migrant workers can contribute to economic development. Remittances have proved extremely important to the Jamaican economy as the introduction to this chapter highlights. One of the school principals of a secondary school in a rural area commented on the importance of remittances to the local community when he stated that 'if it wasn't for remittances from England/USA the people in this area wouldn't be able to keep going'. He added that whenever he drove past the Western Union office, there was always a long queue of people waiting to collect money from relatives or friends. In a traditional high school, the vice principal

<sup>40</sup> Further research on why Jamaicans working in England do not want to return to teaching in Jamaica might assist the MOEYC to develop strategies that would attract those teachers back in to their own education system.

commented on the fact that several of the students had not paid their examination fees because they were waiting for money to arrive from abroad. Remittances are also sent back from England to Jamaica via the Association of Jamaican Teachers United Kingdom (AJTUK) which is an organisation set up in 2001 to assist Jamaican teachers working in England. Following Hurricane Ivan, the AJTUK has decided to sponsor a school in Jamaica.

Jamaican teachers currently working in England are remitting a high proportion of their monthly salary (9.47%), as did the returned teachers while they were living abroad (11.6%). Other important financial contributions are the savings that Jamaican teachers bring back to the country on their return. This is money which could be invested in the home country, whether through the purchase of property (and this was one of the reasons given anecdotally during the field visit) or through investment in education or business.

The level of savings is quite different between those Jamaicans currently in England (13.07%) and the level of savings accrued by those who worked abroad and have returned (33.3%). This might be explained by the high cost of living in England (particularly London) as compared to the cost of living experienced by returned Jamaican teachers who were living and working in other Caribbean territories. It is also important to note that the sample was very small.

## Conclusion

The mass recruitment of teachers to the United States and England was an issue of concern in Jamaica in 2001 and 2002. This was on the grounds that the Jamaican government subsidises teacher training and that the outflow was both costly and damaging to the country's educational infrastructure. Since then, international recruitment from Jamaica has declined. However, the Jamaican government has remained active in initiating and participating in dialogues with recruiting countries and at regional and multilateral levels, with its representatives very vocal at the 15th CCEM. Nevertheless, the Ministry of Education, Youth and Culture does not know precisely how many Jamaican teachers have migrated or how many have returned. This project, although it has not been able to establish precise numbers, has been able to identify some important trends and effects.

The research has highlighted that migration has had more of an impact at the secondary level than the primary level. Moreover, and important when considering the impact on poverty levels and poverty reduction, it has not impacted more on the poorer schools and there is little evidence of a 'ripple' effect. In practice, the impact of teacher migration at the school level appears to be qualitative rather than quantitative. The better-qualified and more experienced teachers are those most likely to migrate and they have been replaced, in many cases, with newly qualified teachers. This is of particular concern in an education system which is facing a number of challenges.

International teacher recruitment has exacerbated pre-existing staffing problems in subjects such as mathematics and science. Efforts to address the shortages of mathematics teachers, through financial incentives, do not appear to have been very successful. At the same time, younger

trainee teachers, with fewer personal commitments to hold them back, are also open to migration. Those training in shortage subjects appear to be particularly interested in migration (and more likely to be recruited abroad). For example, 50% of Jamaican trainee mathematics teachers expressed an interest in working abroad.

Professional development and salary were the two main reasons given by Jamaican teachers for migrating to England, where there is a settled Jamaican community which can give support on arrival. Indeed, some LEAs actively encourage the recruitment of Jamaican (and other Caribbean) teachers, not only because of shortages, but also because of the desirability to provide role models for second and third generation pupils of Caribbean origin. There is little doubt that individual teachers benefit from higher salaries and opportunities for professional development.

In terms of the impact on the source country, it should be noted that remittances and savings are significant at an average monthly rate of 9.47% of salary remitted and 13.07% saved. However, Jamaican teachers who are currently working in England stated that although they expected to return home, they did not wish to resume their careers as teachers, which would diminish any benefits that may have accrued from both the experience of teaching in England and through professional development opportunities. It remains too early to confirm this. Finally, the project did not have the opportunity to survey Jamaican teachers recruited to the USA and to Canada. Such a survey would fill an important remaining knowledge gap and is a recommendation for further research.



## Chapter 2: Sending Country: South Africa<sup>41</sup>

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### Introduction

South Africa has a potentially pivotal role in the development of sub-Saharan Africa. As the largest and most developed economy, its fortunes have important spillover effects in terms of trade and factor mobility throughout the subcontinent. This economic importance combined with the country's large population - 44 million – gives the country a potential leadership role within Africa. This potential is underscored by the moral ascendancy South Africa's government still retains internationally on account of its remarkably success in ending the pariah apartheid regime and replacing it with democratic rule. Although regarded as a middle income country, South Africa's future development may be critical in reducing poverty in the world's most deprived continent. It is not fanciful to suppose that South Africa could potentially play a role within Africa akin to that of Japan within East Asia in the post-war period, catalysing economic growth and providing an important role model for poorer aspiring states. For this reason, the possibility of a factor such as a 'brain drain' – impeding South Africa's future development has an importance that goes beyond the implications for its own citizens.

However, despite the important external role of South Africa, it also faces many internal problems and challenges that complicate the analysis of issues such as the 'brain drain'. Many of these problems are idiosyncratic and a legacy of the apartheid history of the country. Central to this are the extreme inequalities within the country, often still drawn along racial lines. The migration of skilled workers from South Africa is a potentially sensitive subject, because such workers tend disproportionately to be white. There is a fear that outward flows may represent flight by this community in the face of the perceived threats from crime and redistributive policies. When considering the emigration of teachers in particular, the analysis of the consequences of such movements for education is complicated by the heterogeneous nature of the school system in South Africa. Despite considerable efforts by the post-apartheid government to equalise and progressively redistribute government spending, the state school system still appears partly segmented with hierarchies of school quality existing that are largely a legacy of old racial divisions.

In this chapter the findings of fieldwork carried out to examine the process of international recruitment of teachers from South Africa are presented. It concentrates on the consequences of such recruitment for the educational system in the country. Unfortunately, the South African government does not keep any record of the international recruitment of its teachers. Given this data limitation, and the size and complexity of the country, the fieldwork does not provide results that are nationally representative. Instead, it is more of a case study, focussing in particular on twenty schools in a region of KwaZulu Natal province. The schools were selected purposively to capture the diversity of the country, with some that have experienced the loss of teachers to overseas countries being chosen along with a 'control group' that had not. What the data lacks in sample size it compensates for in the range and richness of information gathered. Alongside interviews with the head teachers of the twenty schools in the sample, questionnaires were administered to all staff. Other trained teachers who had returned from working abroad were sought out and surveyed. Fieldwork in England also identified a sample of South African

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<sup>41</sup> This chapter draws upon a paper "The career plans of newly qualified South African teachers", co-authored with Carol Bertram, Abanithi Muthikrishna and Volker Wedekind accepted by the South African *Journal of Education*. These co-authors were collaborators in the project and played a key role in collecting the South African data. Discussions with them have helped give rise to some of the ideas in this chapter. The usual caveats remain.

teachers working in English schools, information from whom is reported here. All teacher training institutions in the country were approached in order to organise a survey of trainee teachers around the time of their graduation. The result of this data collection is that, while a definitive or nationally representative results about the international recruitment of teachers in South Africa cannot be provided, the fieldwork does investigate a variety of dimensions of the process and obtained valuable insights on a wide range of points. This allows the report to provide indicative answers to some key policy issues. At worst, it generates a range of informed hypotheses that could be tested by larger scale data collection and subsequent research.

The structure of this chapter is as follows. Section One provides the national context for the research, describing how international recruitment of teachers rose to prominence as a policy issue within South Africa and providing a tentative analysis of its origins. Section Two outlines the nature of the various kinds of data collected. The main contribution of the chapter is provided by the results of the analysis of the data, which are given in Section Three. Section Four summarises and concludes.

## 1. The context of international teacher recruitment

In 2001, South Africa's then Education Minister, Kadar Asmal, voiced concern about international recruitment of teachers, accusing British recruiters of 'raiding' the country's resources. In part, this recruitment was objected to because, due to the heavy state subsidies of teacher education, it implied that South Africa would be funding the training of teachers who serve in other countries. However, there was a second concern: that international recruitment would leave South Africa with insufficient teachers to staff its own education system. At first glance, this second argument seems paradoxical given South Africa's exceptionally high unemployment rate. The unemployment rate in South Africa is one of the highest in the world, estimated at 30-40% (depending on the definition), and has been this high for over a decade, with no sign of abating (Kingdon and Knight, 2001). This apparent surplus of labour would seem to imply that there would be little loss to South Africa from the possibility of international movement of labour. Nonetheless, high unemployment in general does not necessarily imply a surplus of teachers in particular. To examine this issue, it is necessary to look more specifically at the supply and demand for teachers in South Africa<sup>42</sup>.

The government has a central role in the market for teachers in South Africa. Most schools are run by the government, with private schools tending to cater only for the more affluent. Consequently, the demand for teachers is determined in large measure by the government and has been subject to fiscal constraints as the post-apartheid regime has endeavoured to restrain expenditure in the face of numerous political pressures. The great inequalities in public spending on education in the apartheid period have posed a particular challenge. White schools had much lower teacher-pupil ratios than other schools, especially those for Africans. The post-apartheid government has responded to this by setting a uniform target teacher-student ratio (referred to as the 'Post Provisioning Norm' or PPN) for all schools and each year funding sufficient teachers in state schools to ensure that target is reached. This policy would risk driving

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<sup>42</sup> Unemployment rates are much lower for highly skilled South Africans than the country as a whole. For example, Kingdon and Knight (2001) report unemployment rates of 4-6% (depending on definition) among South Africans with higher education in 1994.

previously privileged parents out of the state sector, so school governing bodies have been given the power to use fee income and other locally raised funds to employ staff (termed School Governing Body Teachers) in addition to those paid by the Ministry of Education. The South African government also plays a major role in the supply of teachers: teacher training is provided by public sector institutions and is heavily subsidised by the state. However, it is important to note that the market for teachers is not entirely centrally planned. Communities, particularly more affluent ones, influence the demand for teachers by funding the employment of School Governing Body Teachers, while the supply of new teachers is strongly affected by the willingness of school leavers to enrol for teacher training.

The South African government has sought to actively manage the supply of teachers to meet local demand. During the second half of the 1990s, the official perception was that there was an oversupply of teachers. The Hofmeyr audit of teacher training in 1994 estimated that 25,000 new teachers were being trained each year and judged that this was excessive, partly due to a decline in student numbers<sup>44</sup>. As a consequence of this assessment, a moratorium on the employment of new teachers by the Ministry of Education was introduced in 1997. Until 2000, newly qualified teachers could only obtain temporary posts within the state sector. Furthermore, severance packages were introduced to encourage the exit of some teachers from the system. The number of teachers that the Ministry would continue to fund was set according to the PPN. Where schools had excess teachers, those who left the system were often those nearest to retirement age as they were the most willing to leave. There have been estimates of the number of unemployed teachers in South Africa. Education Minister Asmal has said, for example that “details from the 2001 census suggested about 100,000 qualified teachers below the age of 30 were not working in the sector and could be considered a ‘reserve pool’” (Cape Times June 10, 2003). In the same year, Duncan Hindle referred to 240,000 unemployed teachers in the country (Sunday Times, 05 October 2003).

It is in this context of officially perceived oversupply that the international recruitment of teachers from South Africa should be understood. With a moratorium on the employment of new teachers and numbers of experienced teachers taking early retirement, South Africa was an attractive location for agencies to find recruits willing to teach in the UK or other countries<sup>45</sup>. Moreover, with an apparent oversupply of teachers locally, it seems hard to argue that the consequences of international recruitment for the education system in South Africa would be severe.

However, around 2000, when international recruitment of teachers from South Africa rose to prominence, there began to be a reassessment of the official position that there was an oversupply of teachers. This was partly because the measures introduced to deal with oversupply had been very effective. As well as reducing demand, they had reduced the supply of new teachers by making it less attractive for students to train to be teachers. Although wages for teachers appear to be competitive with comparable occupations (Crouch and Perry, 2003), this is beside the point if there is a government moratorium on hiring new teachers. For whatever reason, in South Africa, Education is an unpopular field subject for entrants to higher

<sup>43</sup> By law, no state school may exclude pupils who do not pay fees. However, state schools serving more affluent communities are still able to collect substantial fee revenues.

<sup>44</sup> The decline in student numbers is thought to be due to falling enrolment rates, perhaps due to HIV/AIDS with children either directly infected or dropping out of school due to increased financial pressures.

<sup>45</sup> Wages for teachers in South Africa were anyway well below those in the UK.

education. A nationally representative survey of Grade 12 students found that education was the second least popular subject choice, the first preference of 1.4% students, ranked only ahead of Physical Planning and Construction (Cosser and du Toit, 2002). The reduction in the supply of prospective teachers was compounded by the perhaps unintended consequences of reforms to the provision of teacher training. Specifically, the provision of teacher training was shifted from provincial teacher training colleges to national Higher Education Institutes (HEIs, predominantly universities)<sup>46</sup>. This shift in provision was intended to raise the quality of teacher training but also tended to reduce the quantity. Teacher training colleges were closed and quotas for enrolments into Higher Education Institutions set by administrators concerned with student enrolment generally, rather than teacher training in particular. Indeed, at the time of writing, the intention is to reduce enrolment in HEIs by 6% despite increasing concern within the Ministry of Education about a possible shortage of new teachers.

As a result of these reductions in supply, the flow of newly qualified teachers is substantially below the number of teaching posts that become vacant each year. There are estimated to be around 39,000 students studying for BEd. and PGCE courses, implying a flow of around 9,000 newly qualified teachers each year. By contrast, rates of teacher attrition have been around 4-5% per annum. With a total stock of around 400,000 teachers in South Africa, this implies a need to recruit 17-20,000 teachers per year<sup>47</sup>. Recent research by Crouch and Perry (2003) has reached similar conclusions, although an earlier study by Crouch had proposed the more alarming statistic of a shortfall of 55,000 teachers. As a consequence, South Africa has had to start eating into the 'reserve pool' of unemployed teachers referred to by Minister Asmal. Some have expressed concern over this. Duncan Hindle, the permanent secretary, argued that it was a 'myth' that unemployed teachers provided a reservoir for recruitment because many were not actively seeking employment. Others have argued that unemployed teachers are not trained in shortage subjects like mathematics and science.

Opinions differ over the extent to which there are currently teacher shortages in South Africa. Since the critical comments of Minister Asmal, the Ministry of Education has softened its criticism of international teacher migration. The Permanent Secretary at the Ministry, Duncan Hindle, has argued that there is no general shortage of teachers in South Africa. Furthermore, teachers recruited typically return to South Africa and bring the benefit of useful experience. There is also the belief that the demand for teachers from the UK in particular has fallen since a peak around 2000.

Nonetheless some have voiced concern over the future due to two separate developments. One is the HIV/AIDS epidemic, which it is feared will have a serious negative impact on the supply of teachers in South Africa. Already, this is contributing to teacher attrition – teacher deaths alone implied a 1% rate of attrition from the service. A recent study of some 17,000 teachers nationally in 2004 which took saliva samples found that 12% of those working in public schools were infected with the HIV virus (Shisana et al, 2005). It is not clear that teachers are a

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<sup>46</sup> Up to 2001, universities offered PGCEs whilst teacher training colleges offered 4 year diplomas. Subsequently, all teacher training was to be done in HEIs. For example, in Kwa-Zulu Natal, the province that the fieldwork for this paper was conducted in, fifteen teacher training colleges were shut down in 2001, with another two being incorporated into Higher Education Institutions. This left the University of KwaZulu-Natal as the largest provider of teacher training in the province, with University of Zululand and Durban Institute of Technology being the remaining providers of teacher training.

<sup>47</sup> This information was provided by Dr Labby Ramrathan of the University of KwaZulu-Natal in an interview on Monday 26th July.

particularly high risk group for the virus, but even if not, some may well be recruited to replace losses in the private sector (Peter Badcock-Walters, reported in *Iafrica*, 05 May, 2003). The second concern is that changes in the curriculum will introduce new demands for teachers, particularly in the shortage areas of mathematics and IT. It is planned to make mathematics and literacy compulsory in all classes in the future: in Grade 10 by 2006 and Grade 12 by 2008<sup>48</sup>. Civil servants at the Ministry of Education suspect that this will lead South Africa to import teachers in the future. Further demands are likely to arise due to government initiatives to make pre-schooling (Grade 0) compulsory in 2010 and to ensure all schools are connected to the internet by 2013.

Finally, it is important to note the role of temporary teachers in relation to staffing shortages in South African schools. A number of teaching posts financed by the Ministry of Education are covered by what are referred to as ‘unprotected temporary educators’ (UTEs). The intention is that all posts financed under the PPN should be permanent posts. Since only qualified teachers can be given permanent appointments, the presence of UTEs may partly be a signal of a shortage of qualified teachers. However, the process of filling permanent posts is rather cumbersome and potentially lengthy, requiring advertising by the Ministry of Education. By contrast, schools can appoint UTEs quickly, so such appointments are often made to fill urgent vacancies. In addition, temporary teachers are paid lower wages than permanent teachers and lack certain benefits, for example, pensions. Consequently, there is some suspicion that administrative delays in replacing permanent staff may partly reflect cost-saving by the Ministry rather than plain inefficiency. One future change that will have major implications here is the intention of the South African Council of Educators (SACE), the Statutory Council that accredits teachers, to stop registering unqualified or underqualified teachers from 2006 onwards. This will greatly reduce the flexibility of South Africa’s education system in responding to teacher shortages.

## 2. Data collection

### 2.1 Existing data sources on teacher migration from South Africa

The issue of the migration of skilled labour is one which has been preoccupying politicians, academics and media commentators in South Africa (see, for example, Crush, 2000). The loss of teachers is one aspect of this, although there is a greater preoccupation over the loss of nurses, doctors and IT workers. Despite this interest, data on the extent of such movements is patchy and often inaccurate. For example, a study by Meyer et al (2000) highlighted the large discrepancy between official figures on migration produced by Statistics South Africa (SSA) and figures based on information collected in five major receiving countries (UK, USA, Australia, New Zealand and Canada). While SSA reported that 82,811 migrants had left South Africa between 1987 and 1997, receiving country figures stated that 233,609 people had arrived. Similarly, SSA figures show that 12,949 professional migrants had left the country, while Meyer’s figures show that 41,496 professionals had migrated. Meyer et al explained that the SSA figures are inaccurate, largely because completing departure forms is not compulsory. There

<sup>48</sup> It was reported that “The Department of Education estimates that it will need more than 6,800 mathematics teachers, almost double the number now in the system, to meet its plans to introduce mathematics as a compulsory subject for grades 10-12”. ([www.newsdirectory.com](http://www.newsdirectory.com), 28 August 2003).

are simply no reliable figures to show exactly how many skilled professionals are leaving South Africa, nor for how long they are staying away. During the fieldwork for this research, meetings with civil servants in the Ministry of Education at both Provincial and National levels revealed that they lacked any statistical information on the extent of international teacher migration. SADTU, the largest teacher trade union, also reported having no data on teacher migration.

Only one smaller (provincial) teacher trade union, the Association of Professional Educators of Kwa-Zulu Natal (APEK), kept records on international departures of teachers. It reported that out of its total membership of around 7,000, thirty-seven had left to teach abroad in the period Jan-June 2004 while a further five had left for the same purpose from July to December 2003. The APEK data implies an annual attrition rate of around 0.6%. If extrapolated, this level of migration would be rather large, given that attrition rates from teaching in South Africa are estimated at around 5%. However, such extrapolation is probably invalid since APEK's membership is unlikely to be representative of all South African teachers. Specifically, it has disproportionately few African teachers and African teachers seem less likely to migrate. APEK's own records showed Indian teachers to be the most numerous among those that had migrated. Another indicator that teacher mobility from South Africa may be sufficiently prevalent to be of concern was a report that about 70% of first-time students registering for education programmes at the University of Natal had indicated their motivation had been emigration or a desire to seek jobs overseas (*Daily News*, April 8, 2003).

## 2.2 Data collected on school visits

In South Africa, fieldwork was undertaken in the region around Pietermaritzburg in the province of KwaZulu-Natal (KZN). KZN is the largest of the country's nine provinces in terms of population, and correspondingly in terms of its number of educators and learners (the terminology in post-apartheid South Africa for school teachers and students respectively). In 2003, it had 2.7m learners – 23% of the national total (Republic of South Africa, 2003). In the same year, there were 5,751 schools in the province – more than in some countries. South Africa's provinces are fairly heterogeneous, which implies care must be taken in trying to generalise from a study of any one of them alone. Although it has a high population density (second only to Gauteng), KZN province is rather rural, with 57% of the population in 1999 living in rural areas compared to 43% in South Africa as a whole (Statistics South Africa, 2004). In terms of racial composition, the 1996 census reported that 81.7% of the province's population were black and 80.1% had isiZulu as their mother tongue. The province had the highest proportion of people of Indian ethnicity (9.4%) in the country and relatively few Coloureds (1.4%). The white population in the province is predominantly English, rather than Afrikaans speaking, a legacy of the province's pre-Independence history as a British-governed area. Education is primarily a responsibility of provincial government in South Africa and it should be noted that in the immediate post-apartheid years, KZN was unique in not being governed by the ruling African National Congress (ANC). However, in the 2004 elections, the ANC defeated the Inkatha Freedom Party that had governed the province since the end of apartheid.

The decision to confine the fieldwork to a particular region was made for logistical reasons, with Pietermaritzburg being chosen because it housed the School of Education, University of KwaZulu-Natal, where our research counterparts worked. Pietermaritzburg is one of the eight educational administrative regions of KZN and includes 782 of the province's schools. As well as reducing travel time, working in this locality helped ensure a good response from schools, since they had a pre-existing relationship with the School of Education through teaching practice and other arrangements. The region includes the small city of Pietermaritzburg, but excludes the large city of Durban to the south. The most remote school we sampled was 120km from the city of Pietermaritzburg, but it should be noted that the region excludes the former Zulu homeland areas of KZN to the north, which has historically had poorer educational infrastructure.

Over 300 schools in the Pietermaritzburg region were contacted to see if they had experienced international migration and from the responses we chose twenty schools to visit for interviews to gather data. Thirteen schools which reported experiencing international migration were selected, with the remaining seven acting as natural comparators, akin to a 'control group'. Sampling was purposive with our counter-parts at the School of Education, University of KZN, selecting a diverse set of schools in terms of school location, type and ethnicity. Table 2.1 summarises the schools visited, characterising them by their racial composition in the apartheid era<sup>49</sup>. As will be discussed, due to integration in the post-apartheid period, schools no longer necessarily retain their earlier racial composition. However, the categorisation is still useful in loosely identifying the historical endowments of the schools and their current potential for raising money from school fees.

**Table 2.1: Sample of Schools Visited**

Location	Type	Experienced international migration	Not experienced international migration
Urban	Primary	1 Ex-Coloured school 1 Ex-Indian school 2 Ex-White schools	1 Ex- Indian school
	Secondary	2 Ex-African school 2 Ex-Indian school 4 Ex-White schools (inc. one private)	1 Ex-African school; 1 Ex-Indian school
Rural	Primary	1 Ex-African school	3 Ex-African schools
	Secondary	None	1 Ex-African school

### 2.3 Returned migrant teachers

It was difficult to find South Africans who had taught abroad and returned home, as there was no natural sampling frame which would identify them. Instead, various informal techniques were used to find such people. Initially, some were contacts of the research team or were

<sup>49</sup> Schools were racially segregated under apartheid and separately administered. What we define as 'African schools' are those that were run by the Department of Education schools in the apartheid era; 'coloured schools' were run by House of Delegates; 'Indian schools' were run by the House of Representative schools; and 'white schools' are what were referred to as former 'Model C' schools.

identified as contacts of Head Teachers in visited schools. 'Snowballing' was used, whereby one returned teacher would be asked if they knew of others. This technique is useful for locating a sufficient number of respondents but may tend to generate an homogenous sample that may be considered unrepresentative. In this case, it is believed that the proportion of returned teachers who were of Indian ethnicity may be larger in the sample than in the population of returned teachers. A total of forty-seven returned teachers were finally surveyed. In some cases, the teachers were interviewed face-to-face by the research team. In other cases, the teachers were given questionnaires and returned them after completing them, themselves.

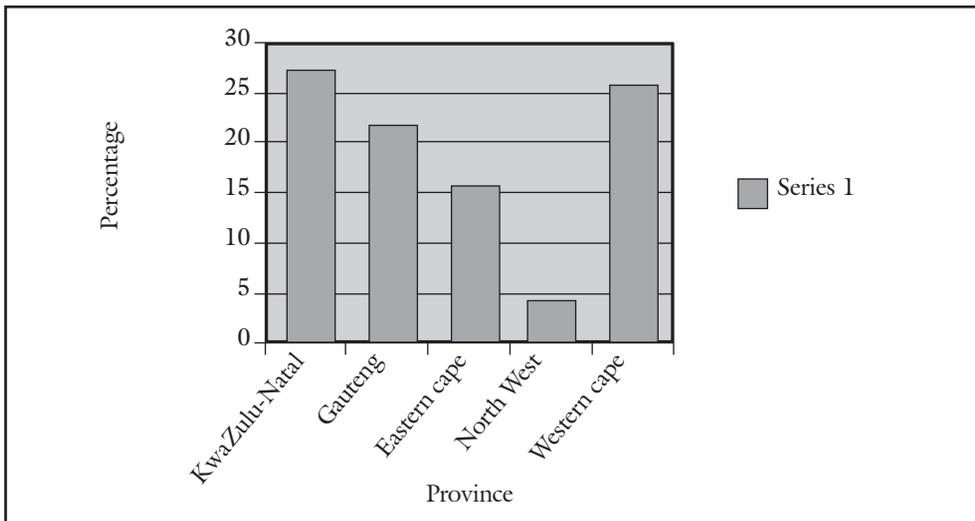
## 2.4 Trainee teachers

The research team from the University of KwaZulu-Natal sent requests to all twenty four teacher training institutions in September 2004, requesting information about how many students were in their final year of teacher training, so that the appropriate number of questionnaires could be sent. Fourteen institutions responded to the request. Institutions were asked to administer the questionnaire during a lecture period in order to ensure a high return rate, but this was not always possible. Completed questionnaires were returned by eleven institutions. Three institutions said that their students were not able to complete the questionnaires, because they were either on teaching practice, or had already left the campus to study for exams.

A total of 1,825 questionnaires as sent out, and 776 (42.6%) surveys were returned. It was estimated that there would be 4,136 teacher graduands from all full-time contact institutions at the end of 2004 (Morrow 2004), thus a total of 19% of these expected graduands were surveyed. An additional 5,121 graduands were expected from Unisa, but these part-time students were not included in the study.

The data from the questionnaires were entered in an SPSS database for analysis. Questionnaires were received from eleven higher education institutions. These were: a university in KwaZulu Natal; two universities in Gauteng; one university in the North West province; three universities and one university of technology in the Eastern Cape; and one university and two universities of technology in the Western Cape. The figure below shows what percentage of the sample came from which province. There were no respondents from institutions in the Free State and Northern Province and there are no teacher education institutions in Mpumalanga and the Northern Cape. Since teacher education in South Africa is a national competence, the number of teachers produced needs to be seen in national and not provincial terms.

Figure 2.1: Percentage of Respondents by Province



## 2.5 South African teachers in England

To complement the analysis of the fieldwork done in South Africa, this chapter includes the results from analysing data about some South African teachers identified during the project's fieldwork in England. A total of forty-two South African teachers were identified during school visits in England that began in November 2004 and until May 2005. The chapter on England provides more information on how overseas trained teachers were identified and surveyed.

## 3. Findings and discussion

### 3.1 Extent of teacher migration and return since 2000

#### 3.1.1 Teacher migration from twenty schools

Thirteen of the twenty schools visited reported experiencing international teacher migration, losing a total of thirty-four teachers due to such movements since 2000. Since we do not have statistically representative data on how many schools were affected, we cannot reliably estimate the extent of overseas migration. However, within our sample of affected schools, there is a substantial rate of migration. The total number of staff in the thirteen affected schools was 395, so over four years the number of staff going overseas represents 8.6% of that number.

International migration was the single most important source of teacher attrition in the affected schools and among them accounted for over one third (37%) of all teacher losses since 2000 (Table 2.2 refers)<sup>50</sup>. Within these affected schools, international migration appeared a more important source of teacher loss than HIV/AIDS: only six teachers were reported to have left the schools due to ill health or death since 2000.

<sup>50</sup> In the twelve schools affected by international migration that provided information, a total of 140 teachers were reported as having left since 2000. Thirty three of these departures were due to overseas migration. Since 51 departures were movements to other teaching jobs in South Africa, overseas migration accounted for 37% of all teachers losses in the affected schools ( $33/[140-51]=37\%$ ).

Table 2.2: Staff Turnover by Type in Twenty Schools

Staff Turnover	Experienced International Migration	Did Not Experience International Migration
Sickness	2	0
Death	4	5
Overseas Migration	33	0
Moved Job in Teaching	51	4
Moved outside of Teaching	10	1
Retired	17	2
Children/Family	6	0
Non-Renewal of Contract	15	9
Other	2	1
Total	140	22

What information there is on when migration occurred suggests something of a peak in departures in 2001. Among the schools we visited, the rate of teacher migration was highest in 2001, when twelve teachers were reported to have left. Among the sample of returned teachers we contacted, the most common years of departure were 2001 and 2002. However, it is not clear from the information we gathered that international migration has slowed significantly. Among the South African teachers surveyed in England, roughly equal numbers had departed in 2002 and 2003. It is hard to draw conclusions about 2004, because that was the year in which the fieldwork was conducted.

Table 2.3: Distribution of Migrants from Twenty Schools by Year of Departure

	Before 2000	2000	2001	2002	2003	2004	Total
Teachers departed from visited South African schools	N.A.	4 (12%)	12 (35%)	7 (21%)	6 (18%)	5 (15%)	34
South Africans working in English schools	6 (14%)	5 (12%)	8 (19%)	11 (26%)	10 (24%)	2 (5%)	42
South Africans returned from migration	9 (16%)	6 (10%)	20 (35%)	20 (35%)	2 (4%)	0	57

Note: N.A. = not available (South African schools were only asked about migration since 2000).

As Table 1 showed, the fieldwork revealed a variety of different kinds of school had been affected by international migration. However, it did suggest some tentative generalisations. International teacher recruitment appeared to impact primarily in urban areas – only one rural school contacted reported having experienced it – and was particularly prevalent in schools that were formerly exclusively for whites. To this extent, it may have little direct effect on the poorest South Africans, who tend to be Africans in rural areas. Nonetheless, urban schools with

substantial numbers of African students who had lost teachers due to international migration were visited; and the head teachers of some of those schools described them as serving poor communities.

The twelve urban schools visited with experience of international migration of teachers, were varied. Few schools that had been designated for Africans under the apartheid regime reported experiencing international migration. Nonetheless, two such cases were purposively selected, both of which had lost only one member of staff each to such movements since 2000. All five formerly white schools (ex-Model C or private) visited had experienced some international teacher mobility, as had one ex-Coloured school and two ex-Indian schools. Due to the partial racial integration of student populations after apartheid, however, it would be wrong to conclude that overseas migration did not directly impact on African students. All schools visited had significant numbers of African students.

### 3.1.2 The wider migration process

Migrant teachers appear to be younger than the average South African teacher (Table 2.4). The South African teachers found in English schools were on average seven years younger than those visited in South African schools. Moreover, even those migrant teachers who had returned to South Africa were younger than non-migrant South African teachers. Similar patterns were observed with years of teacher experience – the migrants were less experienced.

**Table 2.4: Characteristics of Migrant and Non-migrant Teachers**

	South African teachers in visited schools(non-migrants)	South African Teachers in England	South African Returned teachers
Age	41.4	33.7	37.4
Female (%)	67.8%	69.0%	59.6%
White	41.3%	67.5%	35.2%
Coloured/Mixed Race	4.5%	10%	11.11%
Black/African	28.3%	7.5%	3.7%
Indian/Asian	26.02%	2.5%	50%
Other	0%	12.5%	0%
Teaching experience	16.7	10.4	14.1
Sample size	269	42	57

There was no marked difference between migrants and non-migrants in the proportion of women, although there were somewhat fewer women among the returned migrants. In terms of ethnicity, Africans appear under-represented – and mixed race (Coloureds) over-represented – among the migrants, both in the South African teachers working in the UK and among the returnees. Interestingly, there were a large proportion of ethnically white South African teachers in the UK and a low proportion of ethnically Indian ones whereas the reverse was true of the returned migrant teachers. It may be that the sampling over-represented Indian returned teachers – partly because it relied on snowballing techniques led by an ethnically Indian researcher. However, it may also be that white South African teachers are less likely to return from the UK.

The destinations of the thirty-four teachers who had been recruited internationally from the schools visited were varied. Twenty-four (70%) had gone to UK. New Zealand was the next most popular choice, with four moving there, and another three went to Australia. The USA, Namibia and South Korea each attracted one migrant. By contrast, all but one of the fifty-seven returned migrant teachers surveyed had taught in the UK, although one had also taught in the USA and another in New Zealand. The sole returned teacher who had not taught in the UK had taught in Ireland.

### 3.1.3 Interest in migration from teachers and trainee teachers

The school visits revealed considerable interest in international migration. Of the 265 non-migrant teachers who responded, 48% said they would be interested in the opportunity to teach overseas if they had the opportunity. Of these 30% had actively looked for an opportunity to teach overseas in the past. Interestingly, African teachers were not less likely to be interested in overseas migration despite being under-represented among migrant teachers. Indeed, they were the population group that had the highest proportion reporting having actively looked for opportunities to teach abroad. Their under-representation among migrants may therefore reflect reduced opportunities for them to work overseas rather than a lack of interest.

**Table 2. 5: Interest in Migration among Teachers in Twenty Schools by Ethnicity**

Ethnicity	Expressed interest in teaching overseas	Actively looked for opportunity to teach abroad
African	52.6%	21.1%
Coloured	25.0%	16.7%
Indian	57.4%	12.9%
White	42.2%	13.4%
Total	48.3%	14.5%
Sample size	265	265

The survey of trainee teachers asked students what they planned to do in 2005? Just more than a quarter of the sample (27.4%) indicated that they would be teaching abroad, 63.3% said that they planned to teach in South Africa, and 7.2% said that they did not plan to teach in 2005. Two thirds (67%) of all newly qualified teachers who were planning to teach abroad were planning to go to the United Kingdom. Small percentages were planning to go to Australia (9.7%), Canada (2.7%), New Zealand (6.4%), Taiwan (5.5%) and the United States (3%). 40% of teachers indicated that the possibility of working overseas was an incentive to study to become a teacher. Only eighty-three students answered the question as to the entry requirements they were using to go abroad. Of these, two thirds (66%) were using a working holiday visa, 9.6% had an ancestral visa, and 2% had a European passport.

What characteristics make trainee teachers more likely to want to teach abroad rather than in South Africa? A binary logit model was estimated to see which variables were statistically significant in determining whether a newly qualified teacher chose to teach abroad or in South Africa. The model takes the form:

$$\text{Probability (Wish to teach abroad)} = \exp (X) / [1 + \exp (X)]$$

where  $X$  is a vector of explanatory variables and  $\beta$  are the associated coefficients, estimated by maximum likelihood techniques.

Table 2.6 reports the estimated coefficients of the model and their t-ratios. To quantify the effect of particular variables, Table 7 presents the implied probabilities of a student wishing to teach abroad for different values of a given explanatory variable, evaluating at the means of other explanatory variables.

**Table 2.6: A Binary Logit Model for the Probability of Trainee Teachers Wanting to Work Abroad.**

Variable	Coefficient	T-ratio	
Intercept	6.9239	2.36	**
Male	-0.1687	-0.70	
Age (years)	-0.4946	-2.52	**
Age squared	0.00834	2.59	***
Married with children	-1.2862	-1.63	
<i>Population group (default is white)</i>			
African	-1.2658	-2.73	***
Coloured	-0.9092	-1.45	
Indian	-0.1826	-0.49	
Born in South Africa	-0.6482	-2.02	**
Receive a bursary	0.405	1.86	*
Amount of bursary (1000R pa)	-0.1357	-1.71	*
Received government loan	0.2141	0.91	
Secondary or FET teacher	-0.7366	-2.67	***
Specialised in shortage subject	0.0788	0.29	
<i>Teaching qualification (default is degree)</i>			
Teaching diploma	-0.0601	-0.20	
Teacher training certificate	-0.3965	-1.28	
<i>Teacher training institution (names withheld for confidentiality)</i>			
Institution 1	0.145	0.51	
Institution 2	0.5338	1.20	
Institution 3	0.7342	1.86	*
Institution 4	-0.5516	-0.93	
Institution 5	1.1418	1.61	
Institution 6	1.4192	2.20	**
Institution 7	-0.1795	-0.40	
Institution 8	-0.2041	-0.34	
Institution 9	0.7593	2.15	**
Institution 10	0.4322	1.46	

Note: Sample size: 755, of whom 210 expressed an interest in teaching abroad.

\*\*\* = statistically significant at 1%; \*\* = significant at 5%; \* = significant at 10%

Table 2.7: Predicted Probabilities of Trainee Teachers Wanting to Teach Abroad

	Probability
Baseline	26%
Male	25%
Female	28%
Married with children	9%
Not married or not with children	26%
White	29%
African	10%
Coloured	14%
Indian	25%
Born in South Africa	25%
Born outside South Africa	38%
Receive a bursary*	26%
Do not receive a bursary	23%
Received government loan	29%
Did not receive government loan	25%
Secondary or FET teacher	19%
Primary or other non-secondary/FET teacher	33%
Specialised in shortage subject	26%
Not specialised in shortage subject	25%
Teaching degree	29%
Teaching diploma	28%
Teacher training certificate	22%
Default institution	21%
Institution 1	23%
Institution 2	31%
Institution 3	36%
Institution 4	13%
Institution 5	45%
Institution 6	52%
Institution 7	18%
Institution 8	18%
Institution 9	36%
Institution 10	29%

Note: probabilities evaluating at the means of other explanatory variables.

Population group, qualification and training institution each regarded as single variables.

\*Effect of bursary evaluated at mean of bursary for bursary recipients.

Various personal characteristics of students are associated with them being more likely to want to teach abroad. Although there is not a significant gender difference, there is an inverse U-shaped relation with age - the probability of wanting to teach abroad peaks at the age of thirty. Younger trainee teachers are less likely to report wanting to teach abroad (the sample is relatively young, averaging twenty-four years of age). The few (3%) trainees who are married with children are much less likely to be interested in migrating, with a predicted probability of

9% compared to 26% for others. This effect is not quite statistically significant at conventional levels, but is large and significant at the 11% level. Population group is significantly related with intentions to migrate. Controlling for other factors, African students have a 10% probability of being interested in migrating as opposed to 29% for comparable whites. (In the raw data, the proportions interested in migrating are 13% and 30% respectively.) Other population groups are somewhere between these extremes, with the intentions of Indian students being closer to those of whites and those of coloureds more like those of Africans. Students who were not born in South Africa are less likely than native-born to want stay on to teach in the country. However, even for this group, less than two fifths want to teach outside South Africa, *ceteris paribus*. Trainee teachers coming to South Africa from outside are thus a source of ‘brain gain’ for the country.

Some features of the students’ training and circumstances are also related to the probability of them wishing to teach abroad. Other things being equal, students who receive official aid in the form of bursaries, scholarship or loans are more likely to want to work abroad. However, as Table 2.6 shows, the differentials are modest. The effect of receiving an official loan is not statistically significant, whereas bursaries have rather nuanced effects. A dummy variable for receiving a scholarship or bursary is positive and significant, but a variable for the amount of the bursary is negative and significant. The negative effect is only large enough to dominate when bursaries are very high, around 3,000 Rand or more, and only 18% of bursary recipients get such large awards. It may be that larger awards are more likely to have conditions that require students to work in South Africa after their graduation. Students who are training to be secondary or further education and technical teachers are much less likely to want to teach abroad – a 19% probability against 33% for those training for primary teaching. Specialising in shortage subjects – Mathematics (including mathematical literacy), English, Natural Sciences and Technology (including IT) – has an insignificant effect. The kind of teaching qualification being studied – degree, diploma or training certificate – has no statistically significant effect. However, there are large differences between institutions in the migration intentions of students, even after controlling for the aforementioned factors.

### 3.1.4 Returning and planning to return

The extent to which international mobility of teachers represents a brain drain depends partly on how long the migrants plan to stay abroad.

The returned teachers we contacted tended to have worked in the UK for only short periods. Both the mode and median duration of stay was only one year, with the mean being seventeen months. Half the sample had stayed overseas between eight and eighteen months, with only 15% staying for more than two years.

Similarly, of the trainee teachers who planned to teach overseas, the majority (89%, n=94) said that they were planning to return to South Africa. Most of these (57.4%) indicated that they would be returning to South Africa after one or two years abroad, 13.8% said that they planned to stay two to three years, 9.5% planned to stay for three to four years and 9.5% said that they were planning to stay for more than four years.

The fairly short stays planned by the trainees are consistent with the fact that two thirds are going abroad on a working holiday visa, which expires after two years. However, the returned teachers appear to have been less constrained – only eight (14%) had working holiday visas with work permits being more common (held by 70% of respondents).

The South African teachers still working in English schools appear to be staying for longer periods than the returned teachers did or the trainees plan to do. This may reflect a bias in the sampling - by relying on teachers who were trade union members or who were acquiring UK training, the survey probably over-sampled those who wished to work on a longer-term basis. Table 2.3 showed that 45% of the South African teachers surveyed in England had 2001 or earlier - more than three years before the fieldwork. Only two (5%) of the teachers in England reported intending to return to South Africa once their contract ended. Fourteen (37% of those responding) intended to settle permanently in the UK. Among those who intended to return to South Africa, only one reported intending to go back within a year. The median and modal intended future stays were five years, with the mean being 5.6 years. Half of those planning to return envisaged staying for a further four to eight years. As with the returned teachers, few (n=3, 7%) of the South Africans working in England were on working holiday visas with the majority (n=25, 60%) having work permits.

Teachers were also asked if they would recommend teaching overseas, based on their own experience. The majority of respondents would recommend it, although surprisingly the proportion recommending it was lower among teachers in England than among returned migrant teachers in South Africa. 71% of South African teachers surveyed in England would recommend teaching abroad compared to 20% who would not (9% were undecided). 91% of returned migrant teachers in South Africa would recommend teaching abroad. The returned migrants were asked to rate their experience of teaching abroad, with the responses being given below in Table 2.8.

**Table 2.8: Returned Migrant Teachers’ Evaluation of their Experience of Teaching Abroad**

Reply	Responses
Very positive	15 (27%)
Positive	21 (42%)
Neutral	11 (20%)
Negative	4 (7%)
Very negative	2 (4%)

As Table 2.9 shows, nearly all returned teachers contacted were still either working in teaching (87%) or in a related occupation in education (7%). This may partly reflect the nature of the sampling, whereby it was more likely to find returnees in the education sector. However, most South African migrant teachers in the UK also intended to work as teachers (50%) or in education more generally (25%) when returning to South Africa<sup>51</sup>. Only one returned teacher was found working in self-employment, although there was considerable interest in this kind of work among the sample of South Africans working in England. Four teachers gave it as their first response, while another five mentioned it as a second or third option. This means that an

<sup>51</sup> Several teachers gave multiple responses to this question – we have tabulated the first response given.

impressive 45% of migrant teachers who responded to this question said they planned to become self-employed.

**Table 2.9: Career Intentions of Migrant Teachers on Returning to South Africa**

Intention	Actual employment of returned migrants	Intended employment upon return of migrant teachers in the UK
Continue working as a teacher	48 (87%)	10 (50%)
Start work in other education related field	4 (7%)	5 (25%)
Start employment outside of education	0	1 (5%)
Self-employment	1 (2%)	4 (20%)
Stop working (e.g. retirement)	2 (4%)	0

### 3.2 Reasons given for migration

Three different samples of South African teachers were asked to rank the three most important reasons for their migrating - those in England, those returned from migration and those newly qualified who were planning to teach abroad in 2005. Table 2.10 collates the responses of the three groups and reveals a number of similarities. Perhaps unsurprisingly, for each group, higher salary was the most common top reason for migrating. However, opportunities for travel were also very frequently cited as one of the three main reasons for migration. Among those migrant teachers actually working in the UK, travel opportunities effectively tied with higher salary as the most commonly cited number one reason for migration. Professional development was the third most commonly cited reason for migration. The other reasons for migration listed on the questionnaires were all prioritized by some individuals, but the numbers were markedly lower than for the three reasons already noted. It appears that these 'pull' factors (that is, the positive aspects of teaching abroad) are playing a much stronger role than the so-called 'push' factors (that is the negative reasons for staying in SA) such as unemployment in South Africa, the crime rate and bad working conditions. It was interesting that no student teachers ranked 'better working conditions' as a top priority, although this was a stronger reason for teachers who were already working in the UK. Unemployment was not that commonly mentioned as a reason, although 14% of newly qualified teachers did raise it. There may be some mild stigma among more experienced teachers in citing unemployment as an explanation. For example, one returned teacher interviewed did not prioritise it as a reason, despite being unemployed when he/she decided to migrate.

Table 2.10: Reasons for Teaching Abroad

## a) South African teachers working in England

Reason	Ranked 1	Ranked 2	Ranked 3	Total
Higher salary	20 (49%)	4 (10%)	7 (17%)	31 (76%)
Opportunity for travel	19 (46%)	5 (12%)	3 (7%)	27 (66%)
Professional development	15 (37%)	6 (15%)	4 (10%)	25 (61%)
Family/friends overseas	2 (5%)	0	3 (7%)	5 (12%)
Unemployment in SA	1 (2%)	1 (2%)	0	2 (5%)
Safer environment	5 (12%)	1 (2%)	0	6 (15%)
Better working conditions	7 (17%)	2 (5%)	2 (5%)	11 (27%)
Better social services	2 (5%)	1 (2%)	0	3 (7%)
Other	4 (10%)	0	1 (2%)	5 (12%)
Sample size	41			

## b) South African teachers returned from working abroad

Reason	Ranked 1	Ranked 2	Ranked 3	Total
Higher salary	32 (56%)	8 (14%)	3 (5%)	43 (75%)
Opportunity for travel	12 (22%)	25 (44%)	4 (7%)	41 (72%)
Professional development	5 (9%)	9 (16%)	18 (32%)	32 (56%)
Family/friends overseas	2 (4%)	1 (2%)	7 (12%)	10 (18%)
Unemployment in SA	2 (4%)	0	4 (7%)	6 (11%)
Safer environment	1 (2%)	4 (7%)	5 (9%)	10 (18%)
Better working conditions	1 (2%)	1 (2%)	2 (4%)	4 (7%)
Better social services	0	1 (2%)	0	1 (2%)
Other	2 (4%)	3 (5%)	0	5 (9%)
Sample size	57			

## c) Newly qualified teachers planning to teach abroad

Reason	Ranked 1	Ranked 2	Ranked 3	Total
Higher salary	140 (69%)	32 (16%)	11 (5%)	183 (90%)
Opportunity for travel	34 (17%)	93 (46%)	23 (11%)	150 (74%)
Professional development	4 (2%)	32 (16%)	62 (31%)	98 (49%)
Family/friends overseas	8 (4%)	9 (4%)	26 (13%)	43 (21%)
Unemployment in SA	5 (2%)	8 (4%)	16 (8%)	29 (14%)
Safer environment	1 (0%)	6 (3%)	13 (6%)	20 (10%)
Better working conditions	0	8 (4%)	14 (7%)	22 (11%)
Better social services	0	6 (3%)	9 (4%)	15 (7%)
Other	8 (4%)	2 (1%)	6 (3%)	16 (8%)
Sample size	202			

### 3.3 Impact of teacher migration on the education system

#### 3.3.1 Costs of training teachers

Students currently pay fees for teacher education courses in South Africa. For example, in 2005, the University of Kwa-Zulu Natal charges fees of between R10,000-R13,000 per annum for Bachelors and Honours degrees in Education (the precise amount varies by campus). PGCE course fees are around R7,190 for the full-time course. However, the University advises students that the total cost of a year's full time study for 2005 is between R31,710 and R33,010. The excess of this over the course fees is presumably accounted for by living costs, such as residence fees and meals.

There is a student loan scheme – The National Student Financial Aid Scheme (NSFAS). The loans are distributed on a means-tested basis – in 2005, eligibility depended on one's family earning less than R100, 000 per annum. Around 20% of students receive aid under this scheme, commonly in the form of loan-bursaries. Under loan-bursaries, 40% of the cost is written off if the student passes the course. The remainder is to be repaid at a rate of interest equal to the rate of inflation. In 2001, R20m (out of a total R600m) was ring-fenced from the scheme for teacher education. If beneficiaries leave the country before re-paying their loans, they will be eligible for payment on their return – a possible disincentive for returning to South Africa.

Some students can apply to their province and receive a service contract bursary. For example, in 2004, Kwa-Zulu Natal Province had approximately 78 bursaries for teacher training, each of R20, 000. These went to the best students in shortage subjects with maths and science being priorities, followed by technology and commerce<sup>52</sup>. Provinces are supposed to track students after graduation to see where they are working but the system is reportedly in chaos.

An estimate of the cost of teacher training in South Africa has been provided by Duncan Hindle, then Permanent Secretary of the Ministry of Education in South Africa:

At current rates of training, taking account of state subsidies to universities and technikons and the fees paid [through bursaries or privately], three or four years training costs R60,000 to R80,000 per individual. Extrapolating these figures suggests a replacement cost of R1.05billion to R1.4-billion for every 17,500 teachers lost. (*Sunday Times*, 5 October, 2003).

From this quotation, this estimate appears to include privately paid fees. If so, and the fees charged by the University of Kwa-Zulu Natal are typical, the cost to the government may be around half the sum quoted by Hindle – say R35,000 per individual. The exact reduction will depend on the extent to which NSFAS loans are repaid.

One might regard international teacher migration as imposing a cost on the South African government, since it is subsidising the training of teachers who subsequently work in other countries. This argument implicitly assumes that the benefit from the teacher training (to the South African government) depends on the graduate subsequently working in South Africa. On this assumption, the actual cost will depend on how long migrant teachers work overseas. The

<sup>52</sup> Information provided by Dr Francis Nzama, Director General of Teacher Development, Ministry of Education, KZN Province, in an interview on Monday 26th July 2004.

samples we collected suggested that most South Africans teachers abroad would not settle permanently. As reported above, the median stay for those surveyed currently working in England was around three years, with return not being envisaged for another five years. This implies a typical stay of around eight years. This appears lengthy compared to the two year stays commonly reported by returned migrants in South Africa. However, even if we take the eight year interval as a working assumption, that still implies that migrant teachers spend only around a fifth of their working lives abroad. International migration of a teacher can then be said at worst to have cost the South African government a fifth of the subsidy paid for their training – or around R7,000 per teacher. To put this figure into some kind of perspective, R7,000 is around one third of the average monthly take-home pay South Africans reported earning by teaching abroad (see Section 4.5).

### 3.3.2 The direct impact of migration on staff shortages

In this section, we focus on the thirteen schools which we visited that had reported losing teachers to international migration. Only two of the thirteen schools we visited clearly suffered problems of staff shortages as a direct result of losing teachers overseas. In both cases, the impacts on the quality of education provided were described as moderate, although the head teachers of the schools did express concern.

One of the two adversely affected schools was an ex-Afrikaans Technical High School<sup>53</sup>. This school had the highest rate of teacher migration we observed, losing seven teachers since 2000 and four before that period. Five of the seven recent departures were said to have been difficult to replace. The school had also lost another seven teachers since 2000 that had left the profession. The head teacher reported concern about the high level of turnover; “I am quite worried. Traditionally staffing has been fairly stable, but in the last few years, there has been a constant turnover”. She reported staff shortages, with three temporary teachers filling posts. Part of the problem in filling posts was administrative delays, but the head teacher also reported a shortage of suitable candidates. For example, for a mathematics post, just four teachers applied and only one was considered suitable. The head teacher mentioned that five High Schools in the same ward were also looking for mathematics teachers. Shortages of teachers were said to have had a negative impact on both the number of students the school enrolled and the quality of education provided. A lack of qualified teachers meant that the school could not offer subjects that students requested, such as commerce and some humanities. The effect on quality was described as “not huge”, arising from the difficulty of teaching forty or more children in small classrooms, leading to time being spent on “disciplining not learning”. The head teacher’s comment was that the school was coping with teacher shortages, “but only just”.

The other school that was clearly adversely affected by international migration was an ex-Coloured Primary School<sup>54</sup>. This school had lost five teachers due to international migration since 2000 and another eleven for other reasons. Three of the five staff who went overseas were described as difficult to replace. In two of these three cases, this was because the teachers

<sup>53</sup> Under apartheid this school had been an Afrikaans school where that language was used as the medium of instruction. More recently, only 35% of the student body was white (45% African, the rest Coloured or Indian) and only seven students had Afrikaans as their mother tongue.

<sup>54</sup> This was a primary school, that previously had been for coloured students but now such students accounted for only around a quarter of the total.

concerned had made very big contributions to the school's extra-mural work. In the other case, the problem was rather that the teacher was a mathematics and science specialist, subject areas where there are perceived to be particular shortages of teachers. The school had five vacancies, for the time being filled by temporary educators. These posts were unfilled due to administrative problems, but the head teacher also reported a problem finding suitable candidates. The shortage of teachers was said to have had a small negative impact on the quality of education provided, since one teacher who was not trained as a junior primary teacher had to cover in this area. This meant that the teacher was not as effective as if she were appropriately trained and imposed a "tremendous burden" on her, making her unhappy.

The two schools where a direct negative impact of teacher migration was identified did not serve the poorest communities visited. The head teacher of the former Afrikaans Technical school assessed her pupils as coming from homes that were poorer than the average for urban South Africa but not "much poorer" (i.e. placed them second on a five point scale). The head-teacher of the former Coloured primary school rated the area he served as less poor than the average (four on the five point scale). Such assessments of poverty are very subjective and a more objective indicator may be the fees that the school charges. The former Afrikaans Technical school charged 6,200 Rand per annum, one of the highest fees of any of the state schools visited. However, the Head reported that a "huge number" of students – around 80% paid reduced or no fees<sup>55</sup>. The former Coloured primary school charged 700 Rand, the highest fee of any school visited that was not formerly for whites only, and only 3% of its pupils paid reduced or no fees.

Why did international migration not appear to be a problem in the other eleven affected schools visited? In five cases, the affected schools were ex-Model C or (in one case) private schools and as such were likely to be regarded as relatively attractive places for teachers to work. Consequently, they would be the last to suffer from any general shortage of teachers and were able to replace any losses overseas. Four of these schools still served predominantly white student bodies. They reported no shortages of staff and generally reported no difficulties in replacing the few teachers (never more than three since 2000) that had gone overseas<sup>56</sup>. These schools said they had no problem finding suitable candidates for posts, with one school claiming to receive "millions" of applications for each post. The other ex-Model C school that had fully integrated was in some ways similar to the previous four cases<sup>57</sup>. It had suffered rather greater losses of teachers overseas – five since 2000 – but the head teacher appeared relaxed about this: "I have not experienced the brain drain. Over five years, I have had five people go – is that a brain drain? It's not, is it?" Only one of the five departures was described as difficult to replace - a head of department in a shortage subject (Biology). Turnover as a whole seemed high in the school and at the time of the visit two posts covered by temporary teachers. However, the head did not believe that teacher shortages had negatively impacted on the quantity or quality of education provided. This was perhaps because he said he was able to attract high quality candidates to fill vacant posts in due course.

<sup>55</sup> Exemptions were based on gross household income: those earning incomes less than 10% of the fee were exempt; those earning more than thirty times the fee paid the full amount and there was a sliding scale between these two bonds.

<sup>56</sup> The sole exception to this was one departure from a private school, which caused difficulties because it occurred during the academic year.

<sup>57</sup> This school was unusual in that it had successfully integrated its student body to broadly reflect the racial composition of South Africa as a whole (84% of students were African, 8% white, the rest evenly divided between Coloured and Indian). Counterparts at the School of Education at the University of Kwa-Zulu Natal described the school as being officially regarded as a "model" school for that reason.

The other six schools that had experienced loss of teachers overseas cannot be said to have been harmed by it, for different reasons. Two African secondary schools had reported suffering from staff shortages but it was not clear that international migration was to blame, as they had each lost only one member of staff since 2000. In one case, the particular staff member – a Head of Communications – who went overseas had been replaced without difficulty. The staff shortages were ascribed to administrative delays rather than a shortage of suitable candidates. Indeed, the head teacher believed there to be considerable unemployment of African teachers and said that, were it in his power, he would encourage more of his staff to go overseas in order to free up posts for unemployed teachers. In the other case, the departed teacher was a history specialist and said to be difficult to replace, but the school's shortages were rather in Afrikaans and mathematics.

Three former Indian schools had experienced overseas migration with apparently no ill effects. One was a primary school that now had a majority of African pupils and said that two teachers had left to go overseas with the most recent being difficult to replace. This contributed to a shortage of teachers in the school – three posts had to be covered by temporary staff. However, although the head reported problems in finding suitable candidates to fill posts, he nonetheless said that the staff shortages did not adversely impact on either the quality or quantity of education provided by the school. This was because the temporary teachers employed to cover for unfilled permanent posts were qualified, although problems were anticipated if the school lost two more members of staff – for example, due to promotions. In another instance, a former Indian secondary school visited, the school was suffering from declining enrolments so that loss of two teachers overseas was described as “fortunate”, since it avoided the need for teachers to be declared in excess and transferred elsewhere<sup>58</sup>. Another former Indian secondary school reported losing two staff but said it had replaced them without difficulty and did not suffer from staff shortages.

The final case where migration cannot be said to have had a negative impact is interesting in that it was the only rural school that reported having lost teachers to international migration. In this exceptional case, the school had lost its Principal. Although both staff and pupils in rural schools in Kwa-Zulu Natal Province are largely of African ethnicity, the Principal in this case had been a white woman who was credited with having developed the school (which had been established in the early 1980s) and her loss was felt very keenly. She had been awarded ‘Woman of the Year’ by a local organisation due to her efforts. Nonetheless, in some ways, this is an exception that proves the rule in that international migration in South Africa has its effects on urban, not rural, areas. In particular, the Principal's efforts at building up the school were said by her successor to have damaged her health, leading to hospitalisation and eventually in her moving to the UK for a less stressful life as a contract teacher and author. By this account, her migration was perhaps more of a consequence, rather than a cause, of her leaving the school and even without it, ill health may have ended her service to the school.

In summary, international migration did not appear to directly cause shortages in most of the affected schools we visited. The affected schools had lost a total of thirty-four staff members to international migration, but in twenty-two of these cases, head teachers reported no difficulty in

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<sup>58</sup> The falling enrolments were attributed to the establishment of a new school in the heart of the existing school's catchment area.

finding replacement teachers. The fact that schools were usually able to replace teachers who went overseas is consistent with an apparent lack of correlation between overseas migration and teacher shortages. Table 2.11 cross tabulates experience of international migration with whether the schools reported staff shortages. – defined as unfilled vacancies or posts being temporarily covered. The thirteen schools affected by international migration were evenly divided between those that did and did not suffer from teacher shortages. However, all but one of the seven schools that were unaffected by international migration reported either current or past staff shortages. These patterns are consistent with international migration stemming disproportionately from more advantaged schools that are more able to make good any losses of staff. This raises the question of the indirect effects of such migration – whether they cause ‘ripple’ effects and ultimately created shortages in more disadvantaged schools that had not

**Table 2.11: Staff Shortages and the Incidence of International Recruitment**

	Not experienced international recruitment	Experienced international recruitment
Current staff shortages	4	6
Past staff shortages	2	1
No current or past staff shortages	1	6

### 3.3.4 Indirect effects of migration on teacher shortages

Our fieldwork found that, in most cases, schools that had lost teachers overseas did not appear to suffer directly from teacher shortages as a result. Here we consider whether the teacher migration may indirectly lead to shortages, affecting those schools that had not themselves experienced international teacher mobility. A pre-requisite for such indirect effects is that there is a shortage of teachers generally. However, head teachers’ perceptions of this varied widely.

Although half the schools that we visited reported suffering from current staff shortages, this was not necessarily due to a general scarcity of teachers *per se*. In almost every case, schools attributed the failure to fill posts to administrative delays<sup>59</sup>. Permanent teacher posts must be advertised in bulletins issued by the Department for Education. Sometimes vacancies are left off the bulletin due to administrative errors and sometimes delays have occurred due to confusion over whether the bulletin should be open to all or closed so that only teachers previously declared “in excess” could apply.

Schools differed greatly over whether sufficient applicants applied for those permanent posts that were advertised. We have already noted that the most advantaged schools – formerly white-only schools – reported no problem in filling posts. Similarly, former African schools tended to report no shortage of qualified applicants. Head teachers at these schools stressed instead the problem of unemployment of African teachers and reported receiving many applications for most posts advertised. These schools did report the occasional problem finding suitable candidates to teach certain combinations of subjects – for example, geography and Zulu – or particular vocational subjects. However, in general, they expressed no concern about the number of teachers available to fill vacancies. The one formerly African school that did report a

<sup>59</sup> Interestingly, the one school not to complain about administrative delays was the most remote school visited..

shortage of suitable applicants was the most remote school visited. It was 120 km from Pietermaritzburg, and – due to the remoteness – was considered by the head teacher to be one to which teachers would only apply to work “if they were desperate”. It had been unable to find qualified candidates to fill two posts in shortage subjects – Zulu and agricultural science<sup>60</sup>.

Perceptions of the market for teachers varied among other kinds of school. Two formerly Indian schools reported no shortage of suitable candidates for teaching posts. However, three others – and one formerly Coloured school – that we visited all described the market for teachers as very tight, as did the ex-Afrikaans Technical School previously discussed. For some core subjects – such as Mathematics or Science – these schools had on occasion experienced only one suitable candidate applying for vacancies.

What these observations suggest is a degree of separation between tiers of schools in terms of the market for teachers. If tiers of schools are identified in terms of their school resources, different tiers may have access to pools of potential applicants for teaching posts and these pools may be, to a degree, separate from each other. Teachers who may apply for posts within one tier of the school system may not compete for posts within tiers that experience shortages. The top tier - formerly white schools – is more likely to lose teachers abroad but also more able to make good those losses. In part, as attractive places to teach, these schools may be able to siphon off applicants who might otherwise work in lower tiers of the school system. However, they may also draw upon a reserve of applicants who would not be willing to work in schools that were less well resourced or in less advantaged areas. These applicants may include experienced teachers from formerly white schools who had earlier been declared in excess.

The upper middle tier of schools - former Indian and Coloured schools – may lose teachers directly to international recruitment and also indirectly by supplying replacement teachers to former white schools. However, what is unclear is why this tier does not appear able to make good its staff losses from the apparent surplus of African teachers. One possibility is that these schools tend to recruit from a particular network of Indian or White, as opposed to African, teachers. Although it is hard to confirm this without more research, this explanation is suggested by comments made during some interviews in the affected schools.

For example, consider the ex-coloured school mentioned previously as one of only two schools visited which appeared directly adversely affected by international recruitment. It had lost five teachers to overseas and at the time of the visit had five vacant posts filled by temporary teachers. The majority – four - of the School's governing body were African with only one Coloured. However, the head teacher recounted an instance of where he wanted to appoint an African teacher and said, “although it sounds unbelievable”, the African governing body members had been very opposed to the appointment on racial grounds. The head teacher said he had stopped the selection meeting in order to explain to the governing body the need to appoint African teachers. The most vociferous opponent of the appointment had been an African ex-teacher who argued that she knew first hand how poorly some African teachers performed. The head teacher also argued that many African teachers were not suitably qualified – for example, many specialised in subject areas such as biblical studies rather than shortage

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<sup>60</sup> For example, in 2003, the school had short listed five applicants for an Agricultural Science post. Only one applicant came to interview and he found work in another school.

subjects like mathematics. He also said that a problem with African teachers was a fondness for corporal punishment – now prohibited in South Africa. He recounted an instance in which a recently appointed African teacher at the school had pulled a tuft of hair out of a student's head, leading parents to cry “hell and damnation” and ultimately to the teacher's dismissal.

In one formerly Indian secondary school, the Indian head teacher conceded that it was a “fair comment” that some governing bodies of formerly Indian schools did not want to employ African educators. He said that African teachers did apply for posts in formerly Indian schools but that the problem was at the selection stage. Although the pupils in these schools tended to be integrated, the head teacher said that the governing bodies still tended to reflect the old school composition and that, in “95% of cases”, their teachers also reflected this. The head teacher said there was some validity in the complaint of some African teachers of formerly non-African schools “you take our children, but don't take our teachers”. He said that some governing bodies had not changed but would in time. He said that governing bodies of ex-Indian schools would not appoint African teachers who either were not qualified in the relevant field or lacked relevant experience. He claimed that there was a lot of nepotism and irregularities that needed to be attended to, and argued that this was one reason why the Department of Education should take control of the appointments away from the governing bodies. In the two other ex-Indian schools visited, one head teacher said he had experienced problems with three or four African teachers who lacked commitment while the other had only one African teacher, the Zulu language teacher, despite 60% of its students now being African.

In summary, most formerly African and White schools appear not to suffer from a shortage of potential applicants for posts. However, some schools – notably some formerly Indian or Coloured – do report shortages. The problems these schools face may have been exacerbated by international recruitment, both directly and indirectly through “ripple” effects. There appears to be a something of a bottleneck in the market for teachers that restricts these schools from recruiting replacements for migrant teachers from the apparent surplus of African educators in South Africa.

### 3.3.5 International migration and ‘shortage subjects’

It has been argued that teacher migration may impact on the availability of teachers who are qualified to teach scarce subjects. In South Africa, these have been identified as mathematics, English, science and technology. In our fieldwork, however, English was not mentioned as a shortage subject by the schools visited.

The issue of shortage subjects is less relevant to primary schools, where teachers seldom specialise in teaching particular academic disciplines. However, two of the nine primary schools visited did report a shortage of teachers specializing in junior primary education. In the other eleven schools visited, seven reported experiencing teacher shortages in specific subjects either now or in the past. Four of these schools reported shortages in mathematics and four reported shortages in science. Three schools reported shortages in languages (two in Zulu and one in Afrikaans). Information technology, physical education and commerce were mentioned as shortage areas by one school each. Also mentioned by one school each were agricultural science and workshop subjects such as electronics.

International recruitment of South African teachers is likely to aggravate shortages of teachers in particular subjects merely by virtue of reducing the general pool of available teachers. However, it is interesting to see whether teachers in shortage subjects having a higher propensity to be recruited overseas than other teachers. This is suggested by the various pieces of information we have on the subject specialisms of migrant teachers (Table 2.12 refers). Unfortunately, the numbers of migrants are rather small to draw reliable inferences from but nonetheless the results are suggestive. For example, we can compare the subject specialisms of migrant teachers who left the eleven secondary schools we visited (column 3 of Table 2.12) with those of teachers who stayed (column 2). Only science seems over-represented among the migrants. This is also true of the returned migrant teachers we had responses from (column 5). However, it does not appear to be true for the sample of South African teachers currently working in England. More generally, mathematics teachers are more common among the migrants working in England or returned to South Africa than in the schools visited. There is thus some suggestion that mathematics and science teachers are more likely to be recruited overseas – perhaps because these subject areas are commonly seen as shortage areas in the UK, as well as in South Africa. Conversely, international recruitment presumably has little impact on shortages of Afrikaans and Zulu teachers, as these languages are specific to South Africa.

The survey of trainee teachers may also provide some insight on this issue. Subject shortages are most relevant at the post-primary level. However, only one of the ninety-eight students training for that phase said he/she would like to teach abroad. This suggests that migration of newly qualified teachers is unlikely to have an adverse impact on shortage subjects in secondary schools. For the lower phases of education, there was no tendency for students who had specialised in shortage subjects to be more interested in working abroad (compare the proportions in columns 6 and 7 of Table 2.12). This is consistent with the hypothesis that mathematics and science teachers are more likely to be recruited internationally because there is more demand for their skills, rather than because they personally have a greater interest in migrating than other teachers.

Table 2.12: Shortage Subjects and Teacher Migration

	Number of visited secondary schools reporting shortages in subject (1)	Number of teachers in visited secondary schools (respondents) (2)	Number of teachers recruited abroad from visited secondary schools (3)	Number of South Africa school teachers in UK reporting a specialism (4)	Number of Returned South African secondary school teachers (5)	Number of trainee teachers not interested in teaching abroad (6)	Number of trainee teachers interested in teaching abroad (7)
Mathematics	4 (36%)	29 (18%)	2 (13%)	6 (29%)	11 (33%)	79 (14%)	30 (14%)
English	0	32 (20%)	2 (13%)	4 (19%)	13 (39%)	89 (16%)	30 (14%)
Science	4 (36%)	21 (13%)	4 (27%)	3 (14%)	9 (27%)	90 (16%)	31 (15%)
IT	1 (9%)	4 (3%)	1 (7%)	0	0	10 (2%)	4 (2%)
Other languages (e.g. Afrikaans, Zulu)	3 (27%)	15 (9%)	1 (7%)	0	1 (3%)	7 (1%)	0
Physical Education	1 (9%)	1 (1%)	1 (7%)	3 (14%)	1 (3%)	16 (3%)	4 (2%)
Commerce/Economics	1 (9%)	9 (6%)	1 (7%)	0	2 (6%)	68 (12%)	8 (4%)
Other	2 (18%)	36 (24%)	3 (20%)	10 (48%)	6 (18%)	292 (53%)	125 (59%)
TOTAL	11	158	15	21	33	547	213

Note: Some returned teachers and teachers in the UK reported more than one specialism and thus enter the table (but not the column totals or percentages) twice.

### 3.3.6. Does international migration 'cream off' the best teachers?

So far this chapter has focussed on the impact of overseas migration on the numbers of staff in schools – this section addresses the impact on the quality of teachers. It is sometimes suspected that migration tends to disproportionately take better teachers. This may be because there is an excess supply of migrant teachers, so overseas recruiters are free to choose the most outstanding. In addition, overseas recruiters may set high standards, given their uncertainties about the quality of teacher education in other countries. There may also be a self-selectivity: some of the personal qualities that incline people to migrate overseas may also assist in teaching (and other) careers. Such personal qualities may include, *inter alia*, ambition, innovation, self-confidence and determination. In order to investigate these issues, we asked Head Teachers to rate teachers who had left overseas in terms of their effectiveness as teachers, using a five point scale where three was the average effectiveness of teachers in their school.

As Table 2.13 shows, head teachers rated 70% of the departed teachers as being above average. Indeed the most common rating given by principals was the highest, a five, which was awarded to thirteen departed staff (43% of the total). Similarly, principals reported that parents have given positive feedback about the teaching of 70% of the teachers who subsequently left the school. These reports may be somewhat biased - it is possible that head teachers will tend to give favourable assessments of particular teachers to outside researchers (although some appeared very candid in describing the less effective teachers). However, the reports are consistent with the hypothesis that it is the better teachers who are recruited to work in other countries.

**Table 2.13: Head Teacher Assessment of Effectiveness of Internationally Recruited Teachers**

Effectiveness of departed teacher compared to average for the school's staff	Number
5 – More effective	13
4 – Slightly more effective	8
3 – Average	8
2 – Slightly less effective	1

## 3.4 Reverse flows of international teacher migration

Although South Africa is a net exporter of teachers, there is some international movement of teachers in the opposite direction. This takes the form both of expatriate teachers having posts in South Africa and of South African teachers returning after teaching in other countries. There was not a significant number of expatriate teachers in the sixteen schools visited. Only four of the 431 teachers currently employed in these schools were expatriates<sup>61</sup>. Head teachers had varying assessments of the experience of employing expatriates. Asked whether they had received any feedback from parents about the expatriate teachers, one school said the feedback had been good overall, one said it had been bad overall and two had received no feedback.

<sup>61</sup> In addition, a head teacher in one school reported that some of its staff held Swiss or Irish passports, but that he did not consider them expatriate teachers since they had lived their whole lives in South Africa.

Head teachers in three schools rated the expatriate teachers as being of similar effectiveness as their other teachers, the other rated their expatriate teacher as more effective. No head teacher thought the teachers made any extra contribution to the school by virtue of coming from another country.

There was evidence that some South Africans, who had gone abroad to teach, did eventually return to resume teaching. Half of the schools visited either employed or had employed South African teachers who had returned from teaching abroad. Six of these schools were ones that had also lost teachers to international migration, but two were ones who had never had such a loss. Four head teachers thought their returned teachers made an extra contribution by virtue of teaching in another country compared to three who did not. However, in no case did a school regard a returned teacher's experience of teaching in another country as a positive factor in hiring them.

### 3.5 Income gains from migration

The leading motive teachers gave for their working overseas was higher salary. Table 2.14 summarises the information given by migrant teachers on their salaries before departure from South Africa and their starting salaries abroad. The information is reported in the currency of the country in which the respondent resided – Rand in the case of the forty returned migrant teachers contacted in South Africa; Pounds Sterling in the case of the twenty-eight South African teachers found working in the UK. We express salaries in constant 2003 prices using the South African or UK CPI as appropriate. Both samples reported receiving much higher salaries in the UK than they did in South Africa. However, the differentials are larger for the returned teachers. The median starting salary abroad reported by returned migrants was 4.76 times what they previously earned in South Africa. For South Africans found teaching in the UK, the corresponding ratio was 2.68. The discrepancy arises partly because returned migrants reported earning less when in South Africa than those South Africans presently teaching in the UK did. But it is also because returned teachers reported higher earnings while in the UK.

The simple difference in salaries overstates the difference in real income because the cost of living is higher in the UK and it is unlikely the actual exchange rate fully adjusts for this. One way to try to take account of this is by using the purchasing power exchange rates computed by the Penn World tables. Currently, these extend only up to 2000. However, they imply that a Rand is equal to 2.55 Purchasing Power Parity dollars, whereas a Pound Sterling is equal to 0.65<sup>62</sup>. This implies Sterling: Rand exchange rate of 3.9 compared to the actual one of 12.3. On these figures, a Rand can buy 3.2 times as much in terms of real goods and services in South Africa than one would expect using official exchange rates. A cost of living difference of this magnitude starts to challenge the notion that migrants make large gains in real income from moving. Indeed, it would suggest that those South Africans working in the UK are actually worse off, in real terms, than if they had stayed in their own country and continued to earn their earlier salaries. This is counter-intuitive, given the reported motives for migration. Part of the explanation may be that the purchasing power adjustment is not appropriate for teachers, who may – compared to other, lower income, South Africans - tend to consume more traded goods

<sup>62</sup> Data from Penn World Tables v6.0 provided by <http://pwt.econ.upenn.edu/>, accessed on 16th June 2005.

whose real price does not vary so much internationally. For example, one might use the “Big Mac” price index popularised by *The Economist* as a simple means of price comparison. A “Big Mac” in South Africa in December 2004 is reported to have cost 14.05 Rand whereas in the UK it cost £1.99<sup>63</sup>. This implies a PPP exchange rate of 7.1, less than the actual exchange rate at the time of 12.4 but more than the Penn World table estimate. By the Big Mac standard, the cost of living in South Africa is 1.72 times what it is in the UK. This is a large differential, but much less than the difference in teachers’ earnings. Additionally, most migrants are apparently temporary and aim to repatriate some of their earnings abroad, where they can spend it on more affordably priced South African goods.

**Table 2.14: Monthly Take-home Income of Migrants Before Departure and on Arrival (constant 2003 prices)**

	Returned Migrant Teachers		Migrant Teachers in the UK	
	Salary in South Africa before departure (Rand)	Starting salary teaching abroad (Rand)	Salary in South Africa before departure (Sterling)	Starting salary teaching abroad (Sterling)
Median	4533	20174	503	1352
Mean	4711	22009	538	1361
Lower quartile Q25	3843	13935	411	1122
Upper quartile Q75	5536	23249	675	1611
Sample size	40		28	

Note: In 2003, the exchange rate averaged 12.3 Rand per pound sterling.

Migrant teachers in the UK, and those who had returned to South Africa, estimated the percentages of their take-home pay that they had sent back in remittances and retained as savings. Generally speaking, the returned migrant teachers reported higher levels of remittances and savings than the South Africans found working in the UK. The mean proportion remitted was 11% for the returned migrants compared to 7% for the migrants in the UK. The mean savings rate was 26% for the returned migrants and 15% for the migrants in the UK. Many migrants did not send remittances – only 45% of the returnees did so and 55% of the UK migrants. Of those making remittances, the median proportion remitted was 20% for the returned migrants and 10% for those in the UK.

<sup>63</sup> Figures taken from: <http://www.oanda.com/products/bigmac/bigmac.shtml>, accessed on 17th June 2005.

**Table 2.15: Percentage of Take-home Pay Earned Abroad that is Remitted and Saved**

	Returned Migrant Teachers		Migrant Teachers in the UK	
	Remittances	Saving	Remittances	Saving
Unconditional Median	0%	20%	5%	10%
Unconditional Mean	11%	26%	7%	15%
Lower quartile Q25	0%	10%	0%	0%
Upper quartile Q75	20%	40%	10%	30%
% more than zero	44%	85%	55%	74%
Conditional median	20%	25%	10%	18%
Conditional mean	26%	31%	13%	21%
Sample size	39		38	

The responses from the returned teachers imply that on average over a third of the income they earned abroad was ultimately repatriated to South Africa. This money is likely at some stage to be subject to taxation by the South African government – even if just from indirect taxes levied when it is ultimately spent on goods and services. The extra resulting tax revenue should be weighed against the ‘loss’ of public subsidy through training teachers who spend some of their time working abroad. A full analysis of the fiscal implications of migration would imply taking account of the lost tax revenue from the migrants not being resident in the South Africa for a time. However, against this one would also have to consider any savings for government spending that would arise from their absence. This is beyond the scope of the current project.

Nonetheless, it is interesting to compare the likely tax gain from the repatriated migrant income with the public subsidy ‘lost’ due to training them. It is possible to take the information on monthly salaries and duration of employment abroad from the returned teachers to compute their total earnings abroad. The data on the percentage remitted or saved can then be used to estimate how much in total is repatriated. There were thirty-four returned teachers for whom the reported information is adequate to make this calculation. The median amount repatriated is 56,000 Rand (in 2003 prices) and the mean amount is 108,000 Rand. Exactly how much of this repatriated income would ultimately be taxed is unclear, but a conservative estimate would be the 14% rate of VAT in South Africa. This implies that the median returned migrant would pay tax on their repatriated income of 7,800 Rand. This figure is close to the back of the estimate made earlier for the subsidy ‘lost’ due to government support for teacher training. The mean amount of tax paid would be about twice the cost of the subsidy foregone. Basing these calculations on returned teachers is likely to lead to an over-estimate of the fiscal benefits of migration. Not all migrant teachers will return. Furthermore, those South African teachers surveyed in the UK save and remit substantially smaller proportions of their income. However, the South African teachers in the UK also plan to stay for substantially longer periods than the returned migrants did, which may allow them to accumulate more money to take back with them when they do return. At best, the calculation is only indicative – it is based on a small, unrepresentative sample and several heroic assumptions. However, it does suggest that the money repatriated by migrants may give rise to tax receipts that are comparable to the costs to the South African government of effectively training teachers to work overseas.

<sup>64</sup> For salary, we take an average of reported starting and final salary, after adjusting for inflation.

## Conclusions

Perhaps the single most important question motivating the research in this chapter is whether international migration of teachers from South Africa is undermining the country's educational system? In order to definitively answer this question, it would be helpful to have reliable data on the extent of such migration. Unfortunately, such information is not recorded in administrative data. However, South Africa is a large country with more than a third of a million educators<sup>65</sup>. International recruitment of teachers would have to be on a very large scale to have a marked quantitative effect. There was evidence of considerable interest among South African teachers in working abroad. The survey of trainee teachers was a large-scale effort, covering most teacher training institutions in the country, and shows that 27% would like to teach overseas. Among the teachers surveyed during the school visits in KwaZulu-Natal, the level of interest was even higher – nearly half expressed an interest and 15% had actively looked for opportunities to teach abroad.

Among the schools visited in KZN, which had experienced loss of teachers to work overseas, the losses were found to be a major source of staff attrition of up to a third. It was a far bigger factor than sickness or death (and hence the HIV/AIDS epidemic) and came second as a cause of attrition only to movements to other South African schools. As noted in the introduction, the small and non-representative nature of the sample of visited schools precludes making strong generalisations from such results. However, the findings do suggest that teacher migration is occurring on a sufficient scale to affect at least some South African schools.

Interestingly, the affected schools often seemed those most able to cope with the loss of staff. Schools formerly reserved for whites appeared disproportionately likely to lose staff to overseas. However, such schools tend to easily replace any losses, being attractive places for teachers to work and levying fees to enable the employment of additional teachers. Conversely, the most disadvantaged schools – predominantly African rural schools – appear less subject to international recruitment, as do former African schools in other areas. Perhaps as a result, we did not find an association between schools reporting staff shortages and experience of international recruitment. Moreover in only two of the eleven affected schools we visited, did international recruitment appear to lead to harmful teacher shortages. In both cases, the affected schools reported that the negative effects were not that severe. Furthermore, they both charged fairly high fees and were not located in the poorest communities. Nonetheless, both head teachers were concerned about how they would cope in future if current trends continued.

Given that the direct incidence of international migration appears to fall on better resourced schools, it was important to consider the indirect effects and see whether any adverse implications 'trickle down' the hierarchy of schools. Here it was hard to generalise, but it appeared that although most affected former white schools were able to make good their losses, this was unlikely to be at the expense of former African schools. It was more likely that there were pools of trained teachers who could replace losses in former white schools but would not work anyway in former African schools. Moreover, former African schools also appeared to have access to pools of unemployed African teachers, who were unlikely to be considered for posts by former white schools. If there were indirect effects, it appears most likely that these

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<sup>65</sup> In 2001, the number of educators in the country was estimated at 354,201 (Republic of South Africa 2003).

would be on the ‘upper middle’ tiers of the hierarchy of schools – for example, former Indian schools. Teachers from such schools might well be able to replace migrants departing from former white schools. However, it was not clear that such schools were able or willing to offset this by recruiting African teachers. Another significant disaggregation of the effect of migration on shortages is in terms of subject areas. There was some suggestive evidence of higher rates of international recruitment of teachers specialising in some subjects that are considered ‘scarce subjects’ in South Africa – notably the sciences. This is presumably because such subjects are also regarded as ‘scarce’ in receiving countries such as the UK.

The focus hitherto on the impact of migration on quantitative staff shortages may not be the most appropriate for a fairly well resourced educational system such as that of South Africa. It is unlikely that international recruitment will lead to learners staring at empty teacher chairs. Furthermore, given the very high level of unemployment in the country – some of it extending to teachers – shortages of staff appear more to do with bureaucratic delays in authorising appointments than lack of suitable candidates. However, there was evidence of some more qualitative impacts of international recruitment. Specifically, migrant teachers tended to be rated by head teachers as being of above average effectiveness. Hence, there may be a lowering of the standard of teaching due to such migration. We cannot quantify the implications of this effect, but it is troubling.

Turning now from affected schools to the migrants themselves, the fieldwork revealed a number of important facts. The mental picture invoked by the term ‘brain drain’ is of a permanent exodus of skilled labour. However, we had little difficulty in finding South African teachers who had returned from working abroad. They typically had worked for only a couple of years – as indeed the trainee teachers who were interested in working abroad planned to do. Those South African teachers working in English schools appeared to want to work abroad for a more medium term period, although the great majority did intend to return in due course. The modest duration of teachers’ employment abroad suggests that concerns over the government having to fund the training of teachers who are lost to the system can be overstated. Most returned migrants did indeed return to teach in South Africa. This, combined with the significant level of cost-sharing in the provision of teacher training, implies that the subsidy ‘lost’ to the government from training teachers who work in abroad is not large. Our rough calculation puts the sum at 7,000 Rand, less than a third of one month’s wage teaching in the UK. The private gains in nominal income obtained by migrant teachers are large – South Africans are able to earn three to four times more by teaching in the UK than by staying in their own country. Admittedly the cost of living is markedly higher in the UK, but nonetheless, most migrants are able to repatriate significant sums from their stays overseas. Those migrants found, who had returned from working abroad, reported that more than a third of their foreign earnings were either remitted or saved. If these private gains are subject to even a modest level of taxation – for example, when spent on goods bearing VAT – it is possible that the South African government will be able to recoup the money ‘lost’ on training teachers who work abroad.



## Chapter 3: Receiving Country: Botswana

### Introduction

Botswana is an economic and political beacon within the region of Southern Africa. Based on the discovery of diamond deposits in the 1967, the country's GDP per capita has grown at an average rate of 6.1% per year (Oucho, 2000: 56), which is the highest level of per capita growth of any country in the last thirty five years (Maipose, 2003: 1). Due to sound government management of diamond revenues, a successful development strategy has led to the growth of education, health services and social infrastructure, although in recent years many of the gains made have been negatively affected by the impact of HIV/Aids (prevalence was estimated to be 19% in 2003) (Clover, 2003:1-2). The population of Botswana is 1.6 million, 80% of which is concentrated in the eastern 30% of the country and 50% of which live in rural areas. Since independence in 1966, successive governments<sup>66</sup> have retained a commitment to the development of the education sector (Weeks and Mautle, 1996). It is the rapid growth of the education system after independence which explains the recruitment of foreign teachers, or as they are termed in Botswana, expatriate teachers.

This remainder of the chapter is structured as follows. Section One provides a short account of the education system in Botswana and continues with a discussion of teacher shortage and the origin of expatriate teacher recruitment. Section Two presents the process of data collection and Section Three presents and discusses the findings. The final part of the chapter, provides a set of conclusions.

### 1. The context for international recruitment

#### 1.1 The education system

The Ministry of Education (MoE) in Botswana is the central administrative unit with responsibility for all aspects of education, although in recent years, many oversight and administrative duties have been devolved to the six regional offices.

Recent information from the Ministry of Education states that there are currently 485, 389 students enrolled at the primary, junior secondary and senior secondary levels.

**Table 3.1: Number of Students Enrolled 2004**

School Type	Male	Female	Total
Government Primary	159,298	154,054	313,352
Community Junior	57,188*	59901*	117, 809*
Secondary Schools (CJSS)			
Senior Secondary Schools	17,562*	20,070*	37632*
Private Preparatory School	8,266	8,330	16,596
Total	242, 314	242, 355	485, 389

Source: Education Office (Ministry of Education, Botswana)

\*These figures include students enrolled in both Government and Primary Schools.

<sup>66</sup> Although democratically elected, the same political party (Botswana Democratic Party) has ruled since Independence under the leadership of three different Presidents: Sir Seretse Khama, Sir Ketumile Masire and President Festus Mogae.

The education system comprises Primary, Community Junior Secondary Schools (CJSS) and Senior Secondary Schools. All children attend primary school and the CJSS<sup>67</sup>. There is a Primary School Leaving Examination (PSLE) which all children take, although they all have the opportunity to attend the CJSS regardless of whether they pass or fail. Admittance into senior secondary school depends upon passing the Junior Certificate (JC). If a child fails the JC, s/he is not allowed to retake it. The pass rate fluctuates each year depending on the number of children who take the test and the number of available places at the senior secondary level. There is sufficient capacity for approximately 52% of children to attend senior secondary schools, an increase from 28% in 1991<sup>68</sup>. Those children that do enter the senior secondary schools take the Botswana General Certificate of Secondary Education (BGCSE). There are no school fees for any of the children at any level of government schools although the government passed a bill in 2005 on cost sharing which will re-introduce school fees from 2006. There has been an expansion of private schools in Botswana, reflecting the large numbers of expatriate children as well as the wealth of the Batswana. These schools are primarily staffed by expatriate teachers<sup>69</sup>. The current numbers of schools operating in Botswana are listed in the table below.

**Table 3.2: Number of Educational Establishments, 2003 - 4**

Type of School	Number in the Country
Government Primary School	720*
Government CJSS	206
Government SSS	27
Private Preparatory School	60*
Private Secondary School	27

Source: Education Office (Ministry of Education, Botswana)

\* These figures are taken from the Primary School Statistics, April 2004

The number of teachers in Botswana at the different school levels is given in the table below.

**Table 3.3: Number of Teachers at the Primary and Secondary levels of School, 2004**

Type of School	No. Teachers	% Male	% Female
Government Primary School	12,054	21%	79%
CJSS and SSS	10,180	51%	49%
Private Preparatory School	1,074	27%	73%

Source: Education Statistics Office (Ministry of Education)

Botswana Teaching Regulations define a qualified teacher as one who has attained one of the following: a degree and teaching certificate, a degree, an advanced teachers' certificate; a primary teachers' certificate; a primary higher teachers' certificate, a primary lower teachers' certificate; or an elementary teachers' certificate. An unqualified teacher is one who possesses either a Cambridge school certificate, or a junior certificate or the primary school leaving examination

<sup>67</sup> The Human Development Report 2003 states that net primary enrolment ratio was 84% (2000 – 2001) and net secondary enrolment was 79% (2000 – 2001).

<sup>68</sup> Interview, Mr Motswakae, Director of Secondary Education, June 7, 2004.

<sup>69</sup> As a representative of the Botswana Federation of Secondary School Teachers noted not only have the expatriate teachers been important in establishing and developing the private sector, they have also been the driving force behind the pre-primary development (Interview, June 9, 2004). This is an area which requires further research.

certificate. An unqualified teacher can only be employed on a temporary basis. Teachers are trained at six teacher-training colleges around the country. Four of the colleges offer a diploma in primary education and two offer diplomas in secondary education. The University of Botswana offers a Bachelor of Education and there is also a distance learning programme which upgrades those primary teachers with certificates in teaching to diploma level.

**Table 3.4: Levels of Training of Teachers in the Government Primary Schools**

	MEd	BEd	DIP	ETC	PTC	PTC+ CERT	PH	PL	Other	Untrained
<b>Male</b>	2	76	1,174	26	947	44	16	81	3	209
<b>Female</b>	11	339	1,736	101	6489	64	43	246	8	439
<b>Total</b>	13	415	2,910	127	7,436	108	59	327	11	648

ETC = Elementary Teacher Certificate, PTC – Primary Teacher Certificate, PH – Primary Higher and PL – Primary Lower.

Source: Primary School Statistics, April 2004.

**Table 3.5: Levels of Training of Teachers in the Government Secondary Schools**

	MEd	BEd	DIP	BA + CCE	BA + PGDE	Other	Untrained
<b>Male</b>	145	102	2598	93	927	290	168
<b>Female</b>	115	656	2594	94	1039	226	214
<b>Total</b>							

Source: Education Statistics Office (Ministry of Education)

As the recruitment of expatriate teachers is undertaken centrally by the TSM, there is a great deal of information held in the Ministry about the numbers of expatriate teachers working on government contract in the country. However, a note of caution should be added here as it was clear from our school visits that the database was not completely up-to-date. The Director of the Teacher Service Management (TSM), Mr Pheto (who has since retired), stated that a number of expatriate contracts had not been renewed due to the localisation process. The table below, based on the data available from the TSM, shows the number of expatriate teachers working on government contract in June 2004.

Thirty six countries (plus those teachers listed of unknown nationality) supply 1,046 teachers to the Botswana education system as of June 2004. These are all working at the secondary school level. Mr. Pheto, Director of the TSM estimated that 15%<sup>71</sup> of the government secondary school teachers were expatriates. This is a decline from 32% in CJSS and 57% in senior secondary schools<sup>72</sup>.

<sup>71</sup> It was not possible to calculate the percentage as the only figures available for total number of secondary school teachers include those working in private schools in Botswana.

<sup>72</sup> Revised National Policy on Education, Botswana, April 1994, p.11.

Table 3. 6: Expatriates on Government Contract by Country of Origin

Country	Number of Teachers
Zambia	274
India	138
Zimbabwe	132
Great Britain	130
Guyana	89
Unknown Nationality	73
Ghana	57
Kenya	42
Swaziland	26
Malawi	22
Uganda	14
Jamaica	11
Ireland	8
Nigeria	7
USA	7
Australia	6
South Africa	6
Germany	5
Mauritius	5
Tanzania	5
Canada	4
Cuba	3
Lesotho	3
Belgium	2
China	2
Philippines	2
Pakistan	2
Sierra Leone	2
Angola	1
Gambia	1
Hong Kong	1
Sri Lanka	1
Mali	1
Netherlands	1
New Zealand	1
Sudan	1
Trinidad	1

Source: Infinium Database, Ministry of Education, June 2004.

## 1.2 Teacher shortages and international recruitment

This section examines why Botswana needed to recruit expatriate teachers and gives a very brief history of the recruitment process.

### 1.2.1 Teacher shortages: An explanation

At independence in 1966, the Botswana education system was very skeletal: “Botswana inherited a poorly developed education system with very few if any trained teachers at all levels of education<sup>73</sup>”. Construction of schools, training of teachers and the creation of a multi-level school system has been a focus of the Ministry of Education for the past forty years. The growth of the education system has been remarkable: between 1966 and 1992, primary enrolment went up over four times from 71,546 to 308,840 and secondary enrolment increased from 1,531 students to 67,167<sup>74</sup>. The number of secondary schools expanded from 32 in 1976 to 73 in 1986 and 169 in 1992<sup>75</sup>. Whilst there appeared to be teacher shortages at all levels, these were more acute at the secondary level. As the current Director of Education, Mr Motswakae noted in an interview: “[I]n the past because of the massive expansion of the junior secondary education, we used actually to look for teachers for almost all subjects.... In a given year you would find over 20 schools starting and needing teachers.”<sup>76</sup>

The Unified Teaching Service Act passed in 1976 made the Teacher Service Management (TSM) in the Ministry of Education the sole employer of all teachers in primary and secondary schools (there had been nineteen different agencies with some level of responsibility prior to this)<sup>77</sup>. TSM is currently responsible for all teacher recruitment (national and international) and teacher placement. Due to the shortage of local teachers in the past, all teachers in training colleges and at the University of Botswana have gained employment upon completion of their courses. Currently, there are no shortages at the primary level. As students are taught in the local language of Setswana at the early grades of primary schooling, expatriate primary teachers (apart from other Africans who speak the language) would not be appropriate at this level. In secondary schools, there are still shortages of teachers in particular subject areas and these are being recruited from abroad. Mr Pheto, the then Director of the TSM listed the shortage subjects: “In the last five years we have been recruiting [externally] principally for subjects that are new in our curriculum, [namely] the more pre-vocational subjects such as art, business studies, commerce and accounts, design and technology, computer science, agriculture and then home economics”<sup>78</sup>. There are currently sufficient Botswana teachers in other secondary subjects. Mr Pheto added that many of the expatriate contracts would not be renewed when they come to an end as Botswana is self-sufficient in many subject areas. In fact, due to the postponement of the building of a number of secondary schools, there is a small oversupply of secondary teachers in some subject areas<sup>79</sup>.

<sup>73</sup> Kamau (2004: 184).

<sup>74</sup> Weeks, S and G.T. Maule (1996: 75).

<sup>75</sup> *ibid*, p75.

<sup>76</sup> Interview with Mr Motswakae, Director of Secondary Education, MoE, Botswana. June 7 2004.

<sup>77</sup> Motswakae 1996.

<sup>78</sup> Interview, with Mr Pheto, Director of the TSM, June 7, 2004

<sup>79</sup> The issue of oversupply is a contentious one. The publicity officer of the Botswana Federation of Secondary School Teachers stated that his association was currently in discussions with the Ministry about the placing of the teachers. He argued that class sizes were a problem as was workload so there was no reason why the teachers should not be employed.

### 1.2.2 International teacher recruitment

The rapid expansion of the junior secondary schools, coupled with the lack of local staff led to the recruitment of expatriate teachers. One interviewee stated that when he had been teaching at a senior secondary school in 1978 there were five local teachers and twenty-eight foreign staff. These teachers were mainly from other African countries during this period, although there were also a small number of international expatriates. These were volunteer teachers and trained teachers who were funded by the British Overseas Development Administration (ODA). The reliance on African teachers was predominant during this period. An education official recalled that the education system had almost collapsed when many Zimbabwean teachers returned home following Zimbabwean independence in 1980<sup>80</sup>.

Following this exodus of teachers, the Botswana Ministry of Education made an arrangement with the British Council to supply British teachers under the Teachers for Botswana Recruitment Scheme (TBRS). Initially the recruitment was partially funded by the ODA (later DfID) although only certain subject teachers were covered under the funding arrangements. As the curriculum expanded, the Botswana Government paid the recruitment costs of those subject teachers outside of the ODA remit. In 1997, the ODA pulled out of the funding and it was fully funded by the Botswana Government.

Over the twenty years that it was running, the current Director of the British Council in Botswana, David Knox, estimated that approximately 1,000 British teachers had participated in the scheme. The British Council acted as a recruitment agent for the Botswana government. It was responsible for advertising the posts in the UK (having been supplied with detailed requirements from the TSM) and creating the long short-list. The teachers were interviewed by members of the TSM in the UK. The selected teachers were given an orientation in Britain. The TBRS ended in 2001 for two reasons. First, there was a declining need for foreign teachers within Botswana and second, there was a decreasing number of British teachers applying<sup>81</sup>.

With the decline in the supply of British teachers, there was a diversification of the formal recruitment sources with a focus on Commonwealth countries. As one civil servant explained, the aim was to recruit teachers "from countries which have a similar education system to ours". Recruitment from India and the Caribbean has been predominant and this is reflected in the current figures which show that 138 Indian teachers and 89 Guyanese teachers are on government contract. The TSM contracted "reputable human resource organisations" in the host country to perform the initial stages of recruitment (advertising and short-listing). TSM officials would then travel to the countries to undertake the interviews. All expatriate teachers formally recruited would receive an orientation before leaving their own countries and another one week orientation upon arrival.

The other source of teachers in Botswana comes from neighbouring African countries. These teachers are not formally recruited but apply directly to the Ministry for work and they are known as 'freelancers'. This is obviously an inexpensive route for the Botswana government as

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<sup>80</sup> Interview, Mr Motswakae, Director of Secondary Education, June 7, 2004

<sup>81</sup> This was partly because the British government introduced a one year probation period for newly qualified teachers. There was also a shortage of teachers in Britain. The final recruitment drive in 2001 yielded only seven teachers from four national advertising campaigns. These teachers started work in Botswana in January 2002.

they are not required to pay recruitment costs, transportation, etc. However, due to the lack of government to government discussions regarding the recruitment, some concerns have arisen. As a senior civil servant explained: “That is where you get [the accusation] that we are draining people, but that [the recruitment] was not formalised. They would just come in, pitch up and then we employed them”<sup>82</sup>. While civil servants interviewed did not recall any of the African governments formally complaining to the Botswana government, they did recall visits of African Heads of State who openly appealed to their citizens to return home (without much success, one civil servant remembered).

The final source of expatriate teachers arose as a result of state visits. Agreements were made with both the Chinese and Cuban governments to supply teachers. These proved to be less than successful due to language difficulties and were rather short-lived. Figures from June 2004 reflect this, as there were only three Chinese and three Cuban teachers on government contract in Botswana.

The private sector primary and secondary schools are staffed primarily by expatriate teachers. In the main, local teachers are only employed to teach Setswana. The private schools advertise in the local press and recruit expatriates who want to leave the government sector or African teachers who have heard about the jobs through friends already working in Botswana. Evidently, the private schools benefit from the fact that the government hires expatriate teachers as it allows the private schools to access a supply of expatriates without paying relocation costs. They can also hire teachers who are already familiar with the Botswana curriculum. The non-renewal of government contracts for expatriates has put the private schools in a strong position. Head teachers at the private schools that were visited during the research made reference to the large number of speculative applications they receive from expatriates. Head teachers recounted that very few local teachers apply for jobs in the private sector assuming, they believe, that the school is looking for expatriates. However, the other reason relates to the fact that the private schools only hire on contracts whereas working for the government schools is a permanent and pensionable job.

## 2. Data collection

### 2.1 Data collected on school visits

Twenty-three schools were visited over the period of three weeks in Botswana. The project team worked with Mr Kgosi Motshabi, chairperson of the Botswana Educational Research Association (BERA) and researcher at the University of Botswana. BERA selected the schools that were visited based on local knowledge of where the expatriate teachers worked. The choice of schools also reflected our requirements for a selection of schools based on location (urban and rural), level of school (secondary and primary) and owner of school (government and private). Given the size of Botswana, it was not possible to cover the majority of the country. Time and resource limitations dictated that the project team was located in Gaborone and visited schools within driving distance of the capital city. It was not possible to visit remote rural schools.

<sup>82</sup> Mr Motswakae, Director of Secondary Education, Ministry of Education, Botswana, June 7, 2004.

The table below highlights the types of schools that were visited.

**Table 3.7: Type and Number of Schools Visited**

Type	Expatriate Staff	Local Staff
<b>Government schools:</b>		
Senior Secondary	94	556
CJSS	11	140
Primary	0	84
<b>Private schools:</b>		
High	78	8
Primary	114	18
Combined Primary/High	40	0

A number of private schools were included in the sample as this was where the majority of expatriate teachers worked. It was not possible to visit remote rural schools during this field visit. However, the problems of attracting teachers to schools in the remote rural areas were noted<sup>83</sup>. Although the TSM places teachers, many refuse to work in remote areas and demand to be returned to more populated areas. One school visited was not located in a remote area but did experience some of the problems they confront: lack of adequate housing, lack of tarred roads, lack of social amenities, etc. The head teacher stated that he had experienced teachers turning up for work on their first day and not coming back. Weeks later, he was informed that they had requested and received a transfer.

### *Questionnaires*

Questionnaires were left at all the schools for the Botswana teachers and the expatriates. There was a 37% response rate. 257 questionnaires were received from teachers and 168 from expatriates. Dr Sives, Mr Omkemetse Tsimanyane, Mr Tshepo Motshabi and Mr Salebona Simelane input the data.

### *Survey*

The aim of the one-page survey was to discover the extent of the employment of expatriate teachers in schools across the country. The survey was sent out to all secondary schools (junior and senior), as it was known from MoE information that this was where the expatriate teachers were employed. Surveys were also sent to a random sample of primary schools and private schools. The total response rate was 24%. The table below gives a break down of the response rate by type of school.

<sup>83</sup> The Government has a Remote Area Service Allowance (RASA) to provide an inducement to teachers to work in the remote areas and to provide compensation for the 'hardships' teachers experience. The government was going to withdraw the RASA given improvements in infrastructure but two reviews carried out in 1999 and 2003 recommended it continue, although some towns and villages were removed. There is no research to confirm whether the RASA is effective in attracting teachers to remote areas (information supplied by the Ministry of Education, Government of Botswana).

Table 3. 8: Responses to the Survey

Type of Schools	Responses received
Primary	10
CJSS	58
Senior Secondary School	5
<b>Total</b>	<b>73</b>

### *Expatriate responses*

In order to increase the number of questionnaires received from expatriate teachers we requested detailed information from the TSM regarding number and locations of such teachers. Questionnaires were then sent to all expatriate teachers in the CJSS and senior secondary schools. 1,024 were sent out and we received 214 in response. While this is a 21% response rate it is important to note that the database was not entirely up-to-date.

## 3. Findings and discussion

### 3.1 Extent of teacher shortage

#### *Experiences of the schools visited*

At the time of the fieldwork only four government schools – two junior secondary and two senior secondary - reported staff shortages. However, in three of the four cases, it was apparent that these shortages were the result of delays in the appointing of new staff by the Ministry. In the fourth case, a rural junior secondary school, the head teacher explained that teachers did not want to work in rural areas and he had experienced problems retaining staff in the school. None of the staff shortages were the result of a shortage of teachers. Indeed, one head teacher complained that he was overstaffed. Another head teacher complained that “overstaffing has led to lazy teachers”.

#### *Shortages and migration of Botswana teachers*

In the schools we visited, only one Botswana teacher had migrated. He taught the shortage subject of Design and Technology. He had migrated to the UK but the head teacher explained that he had gone because his South African wife was already working there as a nurse. It was reported by Mr Pheto, Director of TSM, that some Botswana teachers had been recruited to work in England by an agency. They had a number of problems with their contracts and this “was publicised quite extensively [in Botswana] and people were frightened”<sup>84</sup>. From the

<sup>84</sup> Interview, Mr Pheto, Director, TSM, June 7, 2004. We interviewed a Ugandan teacher who had been recruited from Botswana, where he had been teaching, as part of this recruitment drive. He related a terrible experience of being recruited by Teaching Personnel as a supply teacher. He was offered a renewal of his contract in Botswana which he turned down to come to England. He had been promised work by the recruitment agency. After six months, the work dried up. According to a report by John Crace, based on interviews with the teachers and published in the Guardian in January 2003, some teachers had to ask their families back home to send them money because they were unable to afford to live (*The Guardian*, January 28, 2003).

evidence we collected, from the small sample of school visits and from the interviews, the migration of Batswana staff has had no impact on staff shortages in Botswana.

### *Shortages and re-migration of expatriate staff*

There was a slight migration of expatriate teachers to third countries. In total, ten teachers in seven schools had 're-migrated'. Of these, seven were males and three were females. Two were head of year teachers, two were senior teachers and six were classroom teachers. Eight of the ten teachers had gone to England and two had migrated to the USA. Interestingly, and possibly reflecting the fact that expatriate contracts are not being renewed (except in the shortage subject areas), 60% of the teachers had migrated in the period 2003-2004, and 40% of that 60% had gone in 2004. Given job insecurity (which was mentioned by a number of the expatriates in their questionnaire responses), it is not surprising that some teachers were looking for employment in third countries. The subjects the teachers taught were: primary (2), science (2), design and technology (1), physical education (3), commerce/economics (1) and other (1). Although two of the subject teachers taught shortage subjects (design and technology, commerce), only one head teacher reported difficulty replacing one of the teachers: a physics teacher.

As the table below shows, the private schools (four schools lost six teachers) have been more affected by the re-migration than the government schools (three schools lost four teachers). In the government sector, only the senior secondary schools have been affected by re-migration. Two of the government schools affected by re-migration defined themselves as poorer than average and one of the head teachers said it had been difficult to replace one of the staff who re-migrated.

Of those who had re-migrated, two were Zimbabwean, two were South African, two were Indian and three were Ghanaian. It is likely that the only teachers the Botswana Government would have directly recruited (i.e. paid the recruitment costs) would have been the teachers from India (both of whom worked in the government sector). The African teachers were likely to have been 'freelancers'. No head teachers reported that re-migration was a direct cause of staff shortages in their schools. Only one difficulty in replacing staff was noted.

### *Impact of staff shortages*

The impression that a lack of staff was not currently a major concern was supported by responses that head teachers gave to a question about their priorities for the use of any additional funding hypothetically made available to them. They were offered four alternatives – which included more staff and more staff training as two options, as well as better infrastructure and more educational materials. Only one school said the lack of staff was the number one priority for them (and in that case the head teacher argued that the Ministry did not calculate the teacher-pupil ratio correctly in the core subjects). The other schools did not rate this as a problem at all. One school rated training as its number one priority. Two schools rated this as their second priority.

However, twelve (all but two<sup>85</sup>) of the government schools visited reported experiencing staff shortages in the past. In the majority (seven) of cases, these shortages were attributed to a lack of suitable candidates. Other reasons included a failure of the Ministry of Education to recognize that there was a staff shortage, delays in replacing teachers on study leave and a lack of housing in the vicinity so that teachers were not attracted to the schools. Two of the head teachers reported their annoyance when government Ministries poached key teaching staff. One school lost a computer teacher and a business studies teacher to the Ministry of Education and another school lost a physics teacher to the Ministry of Health. The school was left without a computer science teacher for four months with an obvious adverse effect on the children's education.

Several head teachers expressed frustration about the administrative delays experienced in the appointment of teachers and voiced a desire to have more control over staff appointments<sup>86</sup>, although one noted that the situation had improved since the process had been devolved to the regional level<sup>87</sup>. A head teacher in a rural high school stated that she did not believe there was a shortage of teachers in Botswana, the problem was one of unequal distribution. This led to one school being overstaffed while a neighbouring school was understaffed. This was supported by the view of a head teacher of an urban senior secondary school who said he was in negotiations with a head of another school about the movement of English teachers. He had too many and his colleague did not have enough.

In the private schools, staffing shortages did not appear to be an issue except in the sense that schools in financial difficulties found themselves unable to afford adequate numbers of teachers. Only two of the nine private schools (one primary and one secondary) were in this position. Both stated lack of money as the reason they were unable to hire more teachers and one of them also gave the reason as lack of authorisation (from the management board - a decision which was itself related to lack of money). It was evident that all private schools had more than enough applicants for advertised positions. One of the head teachers of an urban private school said he received 300-400 applications the last time he had advertised a teaching position. Many of them mentioned receiving speculative applications on a weekly basis<sup>88</sup>. As one head teacher explained "There are a lot of expatriate teachers who were working in government schools but they have not had their contracts renewed. A lot of Zimbabweans apply as well"<sup>89</sup>.

### *Impact of staff shortages and poverty levels of the schools*

Schools were asked to define themselves in terms of their poverty levels against other urban and rural schools. Among the five schools which defined themselves as either poorer or much poorer than the average, two were CJSS (one rural, one urban) and three were senior secondary schools (two urban, one rural). Of the two schools that defined themselves as much poorer, one was located in an urban area and the other in a rural area. In the urban area, the head teacher

<sup>85</sup> One head teacher was unable to answer the question because he was a newly appointed head teacher.

<sup>86</sup> One head teacher of a senior secondary school had undertaken further study in the UK and he expressed admiration for the British system as he felt it gave more autonomy to the head teacher to run his/her school.

<sup>87</sup> TSM still does the recruitment but the regional office organises the placement.

<sup>88</sup> Two head teachers (one private primary and one private secondary) pointed to large piles of speculative applications on shelves in their offices.

<sup>89</sup> Given the political and economic problems in Zimbabwe, there are a great number of Zimbabweans entering the country. This has led to concerns being raised in the Botswana media about levels of immigration. As comments from the expatriate teachers highlight in this report, some African teachers have had negative experiences.

urged our Motswana colleague to drive us around the community where his school was located so we could see the conditions in which people were living. He explained that there was high unemployment and a great many social problems in the area which has led to violent behaviour and theft by the students. He added that some of the teachers at the school held negative views of the students because they live in this area. In the rural school, the head teacher explained that “If the school didn’t provide meals to some of the children, they wouldn’t eat. They are engaged in the school to survive”.

Four government schools currently said they were experiencing staff shortages - two senior secondary schools and two CJSS. Shortages were reported in maths, physics, English and the core subjects (mathematics and English). Of these four schools, two defined themselves as poorer than average. One said shortages were due to bureaucratic delays in replacing a teacher who had left and the other stated that the location of the school in a rural area explained the shortages of teachers. Both head teachers said the teacher to pupil ratio was poorly calculated, leading the urban school to lack teachers in the core subjects and the rural school to lack teachers because the senior teachers were counted as full-time teachers rather than recognised as being partial administrators as well as teaching. Two of the poorer schools had experienced shortages in the past and the third was currently overstaffed. Two of the poorer schools reported re-migration of expatriate staff (three had left in total). None of the current shortages were linked to a lack of suitable candidates or re-migration of expatriate teachers.

*Subject shortages*

When asked about subject areas in which they had, in the past, experienced staff shortages, nearly all subjects were mentioned once. The most commonly mentioned shortage subjects were mathematics and science, followed by arts and crafts. In the table below we can see the range of subject shortages experienced in the schools we visited that reported specific subject shortage. Of these twelve schools, five were senior secondary schools, three were CJSS, and two were private high schools and two primary schools.

**Table 3.9: Subject Shortages Experienced since 2000 in Schools Visited**

Subject	Senior Secondary School	CJSS	Private High School	Primary
Mathematics	2	2	0	0
Science	3	1	1	0
Arts and Crafts	2	1	0	0
Commerce	2	0	0	0
English	1	0	0	0
Humanities	1	0	0	0
IT	1	0	1	0
Home Science	0	1	0	0
Design and Technology	0	1	0	0
Languages	0	1	0	0
Primary	0	0	0	2
Other	2	0	0	0

### *Methods of coping with shortages*

Within the government sector, schools said they had used a range of methods to cope with teaching shortages in the past. Eight of the schools had employed underqualified or unqualified teachers, six had increased class sizes, four had employed expatriate teachers and four had asked teachers to teach outside of their own subject area.

All twelve government schools that had experienced shortages said it had had a negative impact on the quality of education provided simply because the children were either not being taught by a trained teacher or were being taught in larger class sizes. One of the head teachers of the CJSS school said they he was unable to offer all the subjects to the children because of staff shortages. An official from the Ministry had stated that design and technology had been designated as a core curriculum subject but this had not been implemented because there were not enough subject specialists to teach it. In one high school, the head teacher attributed the students' poor performance in the exams to the lack of trained teachers in computer studies and business (this is the same school that lost the teachers to the Ministry of Education). Only two of the government schools said the shortages had had a negative impact on the number of students the school could enrol. As one head teacher explained, if the exam results went down then parents did not want their children to attend the school and would lobby to have them placed at a better performing school. In the private sector, the two schools that had experienced shortages reported that they had both employed under/untrained teachers and another had also doubled up the class.

In the five poorest schools, three reported that they had employed under-qualified or unqualified teachers as their method of coping with the shortages of teachers. One head teacher said he had been forced to increase class sizes as well and one school said it had employed expatriate teachers . Four of the five head teachers who were able to respond to the question said that the shortages of teachers in the past had a negative impact on the school, stating that untrained teachers don't perform as well as trained ones. In one school, the head teacher said the art students had suffered as a consequence of the loss of an art teacher and in another school, the head said that maths had been particularly affected by the shortages of trained teachers.

### *Views of Botswana teachers about shortages*

Botswana teachers were asked whether they believed their schools suffered from shortages. Responses were divided. 48% (119) of those who responded believed there was shortages of teachers in their schools while 52% (127) did not think there were shortages.

Botswana teachers from a variety of different types of schools reported shortages including primary, CJSS, private and senior secondary schools (including teachers from the senior secondary schools where the head teachers said there was overstaffing). Teachers in the government schools were far more likely to state there were shortages when compared to the teachers in the private schools: 53% as compared to 29%. The figure is quite high in the

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<sup>90</sup> One head teacher had only been at the school for a short time so he was unable to talk about how the school had coped with teacher shortages in the past.

government sector given that only four head teachers stated they felt their school was affected by teacher shortages. Shortages in private schools were less but at nearly thirty percent are still quite high.

### *Views of Botswana teachers about migration*

Historically, there has always been employment for Botswana teachers so there has been little incentive to work abroad. This situation may change as teachers are unable to find work<sup>91</sup>. There was a general consensus among those we interviewed that Botswana teachers did not migrate, as one official from the regional education office stated: "That is one thing about Botswana, not only teachers, generally, they don't want to go outside and work. They prefer work at home". However, there appears to be a strong interest in working abroad according to the response to our questionnaire. 62% of teachers who answered the question as to whether they were interested in working abroad gave a positive response. This is high given that we only came across one example of a Botswana migrating in the small sample of schools we visited<sup>92</sup>. There is a significant sex difference in responses as the tables below highlight. Male teachers are far more interested in migrating, with 79% (64) giving a positive response, as compared to 53% (91) of female teachers.

Of those who said they were interested in migration, a smaller number (31,21%), had actually sought an opportunity to migrate. A higher percentage of male teachers had actively tried to migrate compared to female teachers. In terms of age range, those aged between 30 and 40 years expressed most interest in migrating (74 teachers) followed by the age range 21 – 30 (55 teachers).

Several Botswana teachers stated they would like to work abroad to improve their salary, to gain experience, to study and to "share what I have with children overseas". However, others expressed their desire to go because they were frustrated within Botswana, particularly with what they perceived as the lack of prospects for promotion, the poor pay and working conditions. As one Botswana stated: "Not easy to progress or develop. No challenge in work. No incentive, de-motivated."

## **3.2 International recruitment**

### **3.2.1 Profile of expatriate teachers**

In this section we examine the profile of international teachers working in Botswana based on responses to our questionnaires. We received 382 responses (from school visits and postal responses). 241 of the teachers worked in the government sector schools and 141 in the private sector. All of the expatriate teachers employed in government schools who responded worked in the secondary sector. In contrast, seventy of the private sector respondents worked in the primary sector and seventy-one in secondary schools. It is interesting to note that there is a

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<sup>91</sup> The recruitment of nurses from Botswana has opened up the possibilities for Botswana who maybe have not thought about working abroad in the past.

<sup>92</sup> No Botswana teachers responded to our questionnaire and none of the schools who responded to our survey had a Botswana teacher working in their school. UK Workpermits registered that only seven Botswana teachers were granted work permits for a job including teaching: one in 2002 and six in 2003 (UK Work Permits, 2003).

much higher percentage of expatriate males to females in the government schools, especially when we compare figures with the Botswana teachers. There is also a relatively high percentage of males in the private sector given the inclusion of primary schools in this sample.

There were differences in the gender of expatriate teachers depending on where they had come from. Those countries with a higher percentage of male migrants as compared with female migrants were UK (19 males, 3 females) India (32 males, 19 females), Uganda (8 males, 2 females), Zambia (74 males, 30 females) and Zimbabwe (45 males, 20 females). On the contrary, more female expatriate teachers than males came from Jamaica (6 females, nil males), Guyana (8 females, 5 males) and South Africa (11 females, 2 males).

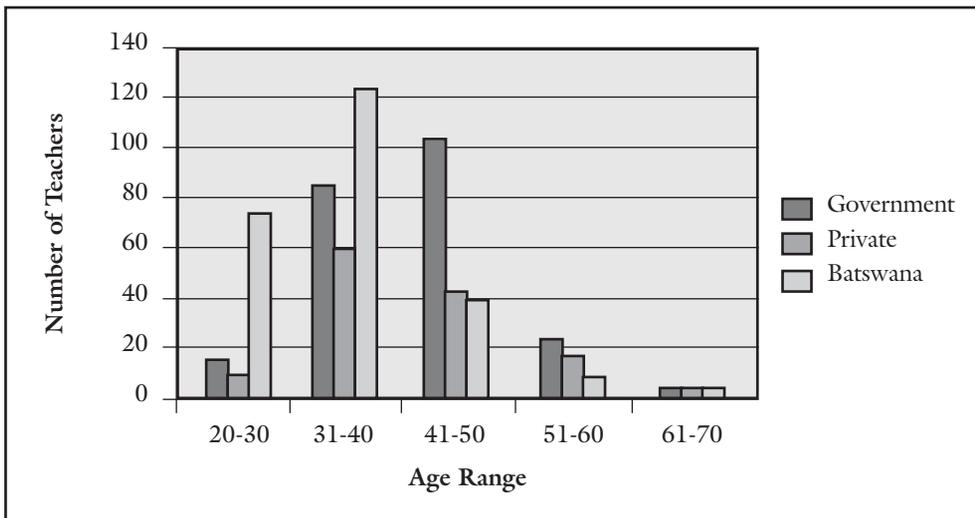
**Table 3.10: Sex of Teachers in Government and Private Schools**

	Male	Female	Total
<b>Expatriates</b>			
Government	175	64	239
Private	65	74	139
<b>Botswana</b>	83	174	257

The majority of the teachers were married (85%) and 87.5% had children.

As the graph below highlights, the age of expatriate teachers in government schools in Botswana is concentrated in the 30 to 50 years age range. The average age of teachers is 42 years, which is reflected in the number of senior positions they occupy. Teachers in the private sector are slightly younger. In contrast, the average age of the Botswana teachers is 35 years.

**Figure 3.1 Age of Teachers in Botswana**



The table on the next page highlights that expatriates are employed in senior teacher positions within the government schools whilst they occupy a variety of positions within the private schools.

Table 3.11: Current Staffing Position

Position	Expatriate		Botswana	Total
	Government	Private		
Head Teacher	0	3	4	7
Deputy Head/ Head of Department	2	22	22	46
Senior Teacher	140	49	109	298
Assistant Teacher	56	47	109	212
Other	37	13	8	58

The overwhelming majority of expatriate teachers originate from developing countries: 93% of respondents as compared to 7% from developed countries.

Table 3.12: Country of Origin of Expatriate Teachers

Country	Number of Teachers			Govt Data
	Govt	Private	Total	
Zambia	78	26	104	274
Zimbabwe <sup>93</sup>	28	38	65	132
India	43	8	51	138
Kenya	17	11	28	42
Great Britain	12	10	22	130
Ghana	14	7	21	57
Guyana	11	2	13	89
South Africa	2	11	13	6
Malawi	4	7	11	22
Uganda	8	3	11	14
Jamaica	5	1	6	11
Trinidad and Tobago	4	1	5	1
Philippines	1	3	4	2
Swaziland	4	1	4	26
Mauritius	2	1	3	5
Democratic Republic of the Congo	0	2	2	0
USA	0	2	2	7
Tanzania	1	1	2	5
Nigeria	1	1	2	7
Rwanda	0	1	1	0
Romania*	1	0	1	0
Yugoslavia	0	1	1	0
Sudan	1	0	1	1
Lesotho	0	1	1	3
Sri Lanka	0	1	1	1
Australia	0	1	1	0
Germany	1	0	1	5

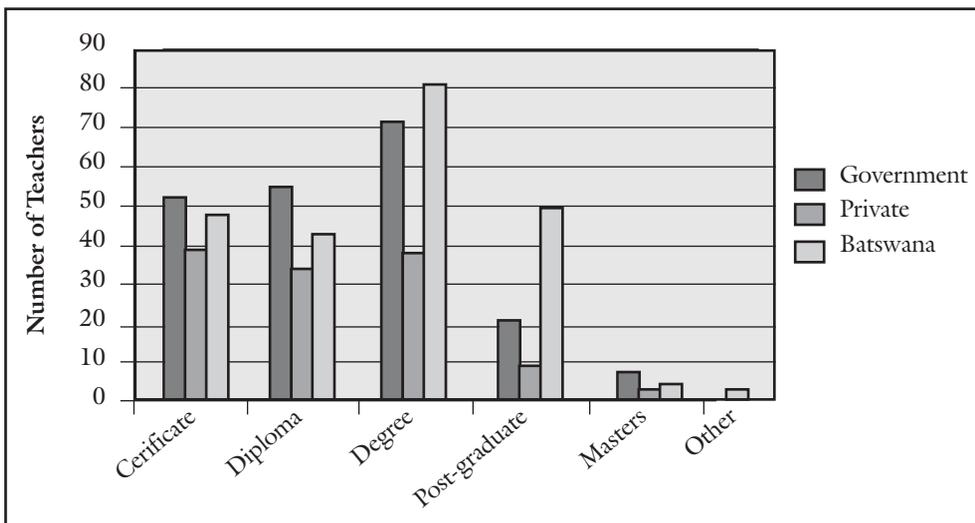
\* The Ministry Database has seventy-six teachers of 'unknown' nationality. The Romanian teacher may be in this category.

<sup>93</sup> One of the South African teachers is now a Botswana citizen but s/he was trained in South Africa.

### Qualifications of expatriate teachers

The teachers working in Botswana are well-qualified, as the graph below demonstrates. 96.2% of those who responded said they had a formal teaching qualification. Of those, 33% had a degree, 28% had a teaching certificate, 26% had a diploma, 10% had a post-graduate teaching qualification and 2% had a Masters degree. The teachers were also experienced as their positions within the school system highlight. The mean length of time the teachers had taught was seventeen years. Forty-five teachers (12%) had taught in countries other than Botswana and their home country.

Figure 3.2 Qualifications of Expatriate Teachers



The table below shows which subjects the expatriate teachers taught. The highest category ticked was 'others'. Of those who stated what the 'other' subject was, the majority mentioned business studies and accounting. This was followed by design and technology, arts and crafts, science and home science. Mathematics and English also feature prominently. It is not surprising to see a high number of teachers are teaching the shortage subjects as identified by the TSM. However, it is interesting to see the large numbers of mathematics, English and science expatriate teachers. It is likely that these contracts will not be renewed as they are not shortage subjects, as defined by the TSM. One head teacher said he would argue with the TSM for some of his expatriate teachers' contracts to be renewed because they were such good teachers. The cost of expatriate gratuities, alongside the political pressure to localise, makes the extension of these contracts unlikely.

#### 3.2.2 The recruitment process

This section examines how the recruitment process operates. It addresses the questions why the expatriate teachers came to work in Botswana, who recruited them and whether the recruitment experience was a positive one?

*The recruitment*

Who recruited the teachers and how did the teachers rate the recruitment process? As mentioned earlier, all government school recruitment is organised by the Ministry of Education. In each of the countries where the Botswana Government have a recruitment drive an agency (whether a private human resources company or a government agency, like the British Council) organises that process at the country level. The private schools undertake their own recruitment. The table below gives responses to the question of who organised the recruitment – some people have mentioned the agency while others have mentioned the Ministry of Education. This table highlights the numbers of teachers in the private schools who were recruited by the Ministry of Education<sup>94</sup>.

**Table 3.13: Subjects Taught**

Subject	Number of Teachers in Government Schools	Number of Teachers in Private Schools	Total
Other	47	6	53
Design and Technology	41	2	43
Arts/Crafts	35	2	37
Science	19	7	26
English	12	8	20
Mathematics	8	10	18
Economics	7	1	8
Humanities	4	3	7
Physical Education	3	4	7
Moral Education	7	0	7
Information Technology	4	2	6
Other Languages	1	4	5
Religious Education	4	0	4
Music/Drama	2	1	3
Social Studies	1	1	2
<b>Total</b>	<b>216</b>	<b>52</b>	<b>268</b>

**Table 3.14: Recruitment to the Government and Private Schools**

Who recruited you?	Government School	Private School
Recruitment Agency	39	8
Ministry of Education	149	21
British Council	11	5
Website	1	0
Other	33	94
<b>Total</b>	<b>233</b>	<b>128</b>

<sup>94</sup> This figure is probably underestimated as teachers in the private schools may have answered the question as it related to their recruitment to the particular school rather than recruitment to Botswana.

The teachers were asked if they had received information about a variety of different issues before they arrived in Botswana? The table below gives the responses.

**Table 3.15: Responses to the Recruitment Process**

Did you receive information about?	Government School		Private Schools	
	YES	NO	YES	NO
School	39	168	48	49
Accommodation	120	85	40	52
Cost of living	82	116	40	52
Salary	165	46	62	32
Teaching Conditions	132	76	61	30

The responses in the government schools show that information was given out to teachers in a number of different areas. A respondent for the British Council said that teachers were not placed in particular schools until they arrived in the country, so they would not have received that information in advance. Normally, expatriate teachers would be provided with accommodation so teachers should have been informed about this prior to their arrival. Similarly, information about salary and teaching conditions were part of the orientation and, according to the TSM, this information was also given at the interview.

Overall, the respondents rated the information given during the recruitment process as positive. 52% rated it as good or very good, 35% as fair and only 13% as poor or very poor.

### *Reasons for coming to work in Botswana*

The overwhelming majority of expatriate teachers who are working in Botswana originate from developing countries. Given the link between teacher mobility and poverty, we were interested to know the reasons why teachers have moved from other developing countries to Botswana. Therefore we have two separate tables which highlight the reasons why expatriates have come to Botswana. These will be supplemented by comments from individual teachers who were asked to say whether they would recommend teachers in their home country to work in Botswana and why. These give a good insight into the variety of reasons why teachers move.

**Table 3.16: Reasons for Moving to Botswana Given by Teachers from Developing Countries**

Reason	Preference							
	1	2	3	4	5	6	7	8
Salary	86	43	42	32	9	2	2	2
Travel	40	32	50	18	27	14	10	1
Professional Development	57	34	29	27	8	15	5	1
Family/Friends Abroad	27	14	9	13	18	17	28	13
Unemployment	7	5	2	6	6	9	19	42
Better Working conditions	49	61	23	14	14	12	6	4
Safer Environment	27	26	24	25	26	13	8	9
Better Social Services	9	5	14	22	19	31	13	10
Other	28	3	3	4	3	2	7	2

Salary is by far the most important reason why expatriate teachers from developing countries have come to work in Botswana. However, professional development and better working conditions also feature prominently, reflecting the relative wealth of the education system in Botswana compared to many developing countries. The opportunities for professional development offered by a better equipped education system are expected to be better than the opportunities offered at home. As one Zimbabwean teacher wrote: "It is easy to gain professional development in Botswana as the government still runs a lot of courses to enhance and empower their teachers". Travel is not an insignificant first preference reflecting the desire of those from outside of the African continent to travel around the region. As a Trinidadian teacher stated ". The opportunity to travel throughout Southern Africa is the largest reward". The issue of a safer environment was also important to many of the teachers, particularly those from the countries of Zimbabwe, Zambia, Malawi and Kenya. Three Kenyan teachers noted that: "Botswana is a peaceful country." One went on to mention that issues such as "corruption, civil war and other internal problems in developing countries" had led to a brain drain of teachers from those countries. A Zimbabwean teacher noted: "The environment is peaceful. One is free to express oneself without any harassment from the powers that be". While the table highlights the importance of salary, which is something we would have expected to find, it also shows that teachers are moving from developing countries for a variety of other reasons.

Below, we contrast the reasons why teachers from developed countries came to work in Botswana and we see a different picture emerging. Twenty-six teachers from developed countries working in Botswana responded to our questionnaire. They were from the United Kingdom (22), Germany (1), Australia (1), Romania (1) and Yugoslavia (1).

**Table 3.17: Reasons Given for Moving to Botswana by Teachers from Developed Countries**

Reason	Preference							
	1	2	3	4	5	6	7	8
Salary	1	0	1	0	1	0	1	0
Travel	7	1	1	0	0	1	0	0
Professional Development	2	2	1	0	0	1	0	0
Family/Friends Abroad	2	0	1	0	0	0	1	0
Unemployment	1	1	1	0	1	0	0	0
Better Working conditions	5	1	0	1	0	0	0	0
Safer Environment	2	3	2	0	0	0	0	0
Better Social Services	0	0	1	0	0	0	0	1
Other	3	1	1	0	0	0	0	0

Not surprisingly, the issue of travel was the most important reason why the teachers from developed countries had come to work in Botswana. As a British teacher stated, s/he would recommend working in Botswana because of the: "Chance of travelling in Southern Africa". However, the issue of better working conditions was also mentioned by a number of teachers, most notably the British teachers. As one wrote: "Children are well-behaved and more respectful than in the UK." Another one added: "Pupils more motivated, pleasant environment. Less severe discipline problems". The two teachers from developed countries that mentioned

the safer environment were British and this could relate to safer working environments in the schools.

### 3.3 The costs and benefits of recruiting international teachers

#### 3.3.1 Costs of recruitment

##### *Financial cost to Botswana government*

It is clearly expensive to recruit teachers from abroad, although costs were dependent on which country the teachers were recruited from. As one education official stated: “Britain was the most expensive because of the pound..... in India.... the recruitment expenses were much cheaper...the rupee is less than the pula.”<sup>95</sup> Some indications of the costs have been supplied by the Ministry. During 2003, thirty teachers were recruited from India and the Caribbean<sup>96</sup>, Kenya and Ghana. The total cost of this recruitment exercise was approximately 1,000,000 pula ( $/9.5 = \text{£}103,654$ ). The recruitment cost of each teacher was therefore in the region of  $\text{£}3,463$ . This included payment to the recruitment agents, airline tickets, removal costs of the teacher and up to three members of his/her family, TSM expenses for the interviewing and medical examinations. It does not include the gratuity paid to the teacher at the end of their contract. Teachers are recruited to work on a three year contract. This compares to the annual cost of training a teacher in the Colleges of Education of 13,380pula ( $/9.5 = \text{£}1400.28$ ). After a four year course, the Ministry of Education will have spent  $\text{£}5601.12$  per teacher.

While the expatriate teachers are paid the same salary as the local teachers, they do get a gratuity when their contract finishes. This is a percentage of the salary so a definite figure was not given to me (although it must be budgeted for). However, the expatriate teachers do not receive a pension and cannot be given a permanent post. In addition to these direct costs, the teachers in Botswana are able to access professional development. As we saw above, this was a major incentive for expatriate teachers to work in the country. However, this does add to the costs of the Botswana government. Ndaba, in writing about the issue of training of expatriate teachers during the 1990s, points out “expatriates are recruited and then given the in-service training in design and technology at the expense of the Botswana government. Considering that they are temporary and expensive to employ, in-service is not only a further cost to the government but in the long term it is the expatriates who gain more by being given the extra training” (Ndaba, 1994:111). However, as well as costs there are benefits to the Botswana education system as a result of training the expatriate teachers, most obviously through enhanced teaching of the students. In terms of whether the government will benefit over the long term from this investment in expatriates, it is clear that in the shortage subjects, the TSM is keen to encourage the expatriates to extend their contracts until full localisation is possible. As a senior Ministry official stated: “...there are still not enough teachers being trained locally...[and I] can see little chance of their being an expansion in these areas [shortage subjects] in the longer-term.”<sup>97</sup>

<sup>95</sup> Interview, Mr Motswakae, June 7, 2004.

<sup>96</sup> Government figures show that seven Guyanese and fourteen Indian teachers were added to the database in 2003/2004. However, more teachers may have been recruited to work in the schools and not been added to the database. The costs also cover the recruitment of teachers at the College of Education. We are not able to give a figure for the cost per teacher as we do not know how many were recruited in 2004.

<sup>97</sup> Interview, June 9, 2004

Of the expatriate teachers who responded to the questionnaire, just over half (52.5%) had received professional development training. Of that number, half had paid for it themselves, while 44% had received training paid for by the Ministry of Education or the school.

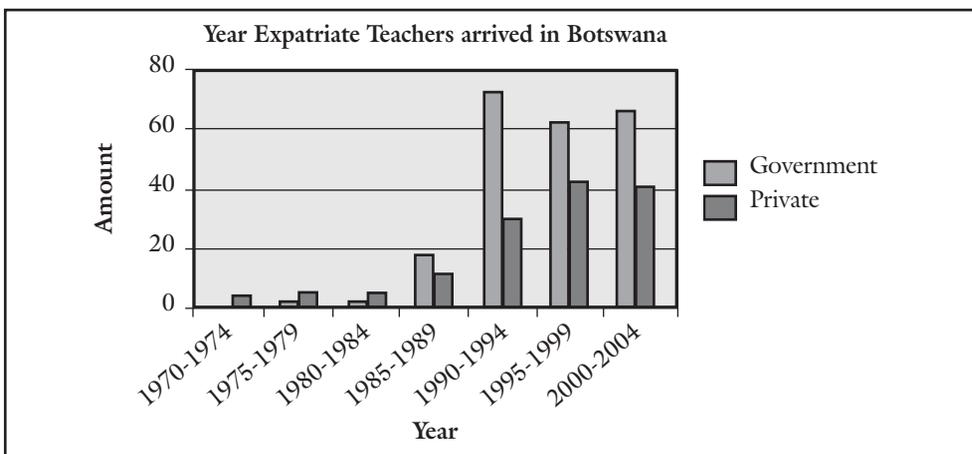
The other issue that would need to be examined in order to determine whether international recruitment was more of a cost than a benefit to the Botswana Government would be to look at how long expatriates tend to stay in the country. From the findings, the following issues can be addressed: when did the teachers arrive in the country; how long are the teachers' contracts; how many of them plan to return home or stay in the country permanently; and how long do those in teaching plan to stay in Botswana? The information is shown in the tables below.

It includes the expatriate teachers working in the private schools although the information is presented separately. Having expatriate teachers in the private system is a benefit to the Botswana government. If there were fewer expatriates then the pool of local teachers would be further stretched between the government and the private schools. It would also appear from the comments made by the head teachers that many of the expatriate teachers they have recruited have worked in the government sector before moving to the private schools. This might well have been due to the non-renewal of contracts (due to localisation) but it could also be a result of the teachers in the government schools being attracted by the private schools and choosing not to renew their contract with the Botswana government. As was stated earlier, the private sector has benefited financially from the fact that the government had paid the removal costs of the majority of the expatriate teachers they subsequently hired.

*Length of time expatriates teachers plan to stay in Botswana*

The first question the teachers were asked was the year that they had arrived in Botswana. As the graph below highlights, many of the teachers in Botswana have been in the country for a considerable period of time. The peak arrival date was between 1990-1994. Combining those who worked in government and private schools, 104, or 29% of those who responded, have been working in Botswana for ten years or more. Another 108, or 30% of those who responded, arrived in the country between 1995-1999.

**Figure 3.3 Year Arrived in Botswana**



### *Length of contract*

Expatriate teachers working in the government schools are employed on three year contracts while those in the private sector are on two year contracts. A respondent who had worked for the British Council said the Botswana Government recruited on three year contracts and was keen initially for the teachers to renew them. Financial incentives were given to teachers who renewed in the form of greater percentage of their salary as a gratuity when they finished their final contracts.

### *Short-term plans*

Teachers were asked about their short-term plans, i.e. did they intend to return home at the end of this contract? Slightly less than half of those who worked in the government sector (108) said they would return home compared to 115 who were not interested. This contrasts very clearly with the teachers working in the private sector, where 82% of teachers do not want to return home the end of their current contract.

The reasons why so many teachers in the government sector want to return home was not a question directly asked in our questionnaire. However, from the responses to the question about whether teachers would recommend working in Botswana to colleagues in their home country, we can suggest a few possibilities. One of the key issues is the job insecurity for expatriates currently working in the government system. As was shown earlier, aside from the shortage subjects, expatriate teachers are no longer being recruited or having their contracts renewed. Several teachers said they would not recommend working in Botswana because there were so few vacancies. As a Zambian teacher remarked: “The situation is changing. There is no surety on one’s stay in the country”. Another Zambian teacher said: “Things have changed. I think they [teachers] are better off at home”.

However, the other very important issue, which was revealed, was the xenophobia<sup>98</sup> many teachers now felt living in Botswana. This was particularly prevalent for Zimbabwean teachers<sup>99</sup>. However, this was a feeling more widely held. A Kenyan teacher remarked that: “Some level of discrimination exists in Botswana, especially towards foreigners”. An Ugandan said: “The attitude towards expatriates is not very good. Local people sometimes make you feel as if you are not a human being”. Allied with this, there is clearly an issue being raised within the education system about the need for expatriate teachers within the schools. A Zambian teacher wrote: “[W]ith the localisation policy in place, any foreign teacher or worker is seen as a robber who has come to steal jobs and money from the locals and this makes the working environment very unfriendly”. An Australian teacher, currently working in the private sector, wrote: “General attitude not pleasant towards expatriates, i.e. ‘You only come here for the dollars’. This is fostered by both politicians and TSM.” While the majority of Botswana teachers had positive views about expatriate teachers, a couple expressed concern. As one wrote: “It’s so painful for local teachers to roam the streets without jobs, while the government continues with the recruitment of [international] teachers”. Another one stated: “Instead of recruiting, the

<sup>98</sup> A study by Campbell (2003) found that Europeans and North Americans were most favoured migrants, followed by Africans, with Asian migrants being the least preferred (Campbell, 2003:71)

<sup>99</sup> The context for this in the case of Zimbabwe is very important. With the economic and political problems in Zimbabwe, there have been many people leaving their country and crossing the border into Botswana. This is causing some tensions.

government should terminate the contracts of foreigners and employ Botswana teachers with qualifications”.

Evidently, not all expatriate teachers had negative experiences as more than half of them expressed a desire to stay in the country at the end of their current contract. A Zimbabwean teacher stated: “Coming to Botswana has enriched and spiced my professional experience and has given me a deeper understanding of multinational culture”. A Zambian wrote: “It has improved the quality of my teaching...I am now studying for my doctoral degree in education (it has laid the foundation for me to advance my teaching career as well as education)”. A British teacher noted that working in Botswana had led to him being “a very creative science teacher – improvising when equipment/apparatus is not available”. A Malawian teacher wrote: “My personal life has actually been improved very much, economically, as well as socially”. Despite these positive examples, the lack of job security, the feeling of being discriminated against and of not being welcome within the system may well push people home.

Of those who wanted to remain in Botswana at the end of the contract, the vast majority wanted to remain in the school where they were teaching. 88% of teachers wanted to remain in the private school and 70.5% in the government schools. This might also reflect the lack of employment (opportunities for internal mobility) for expatriate teachers within the school system in Botswana presently. A number of expatriates said they would not recommend working in Botswana because, to quote a Zambian teacher, there are “no more vacancies for expatriates”.

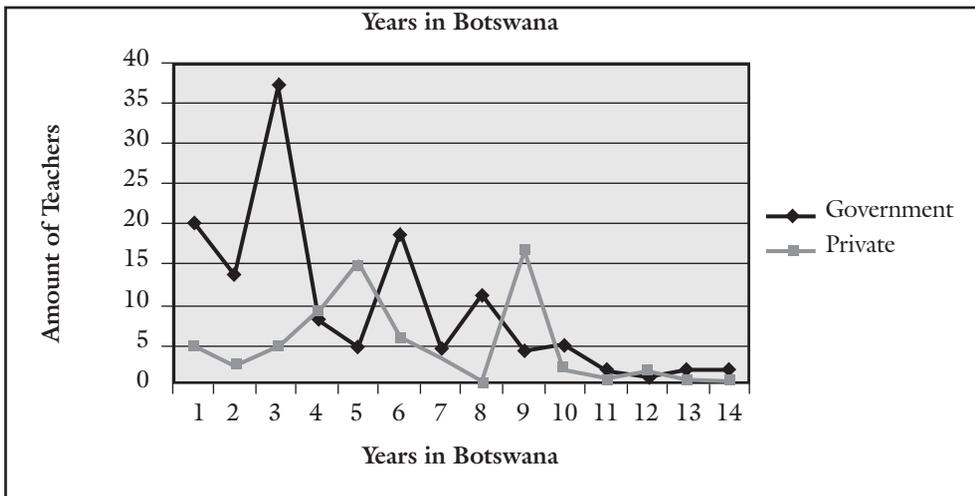
### *Long-term plans*

Teachers were asked how long they planned to stay in Botswana? There was not much difference in the responses between those in the government as compared to the private schools, as the table below demonstrates. Over one third, 37% of the teachers, did not answer this question. Of those that did respond, nearly one third intend to remain permanently living in the country. In figures this translates to 55 teachers from developing countries and 11 teachers from developed countries. It is evident that developing countries are the main losers of teachers to Botswana.

Of those who are planning to return to their home country, almost one third (28%) of the expatriate teachers in government schools plans to spend three years in Botswana compared to 26% in the private sector who want to remain for nine years. The graph below highlights that expatriates in the private sector plan to spend longer in the country than those currently employed in the government schools.

In order to get an overall view on whether the experience of migration had been a positive one for expatriate teachers, teachers were asked whether they would recommend working in Botswana to their colleagues at home. The overwhelming response was positive: 72% would recommend it compared to 28% who would not. There was a difference in response between those who worked in the private sector, 79% would recommend it, compared to those working in the government sector, 67% were positive in their recommendation. Factors which might account for this, are mentioned above.

Figure 3.4 Number of Years Expatriates Plan to Spend Working in Botswana



### 3.3.2 Benefits of recruitment

#### *The benefit to the education system*

It was widely recognised in all the interviews undertaken with head teachers and officials that the role of expatriate teachers in Botswana had been fundamental to the development of the education system. The expansion of the junior and senior secondary schools would not have been possible without the input of the expatriate teachers. Aside from this crucial role, it was also noted that expatriate teachers have aided the development of the Botswana education system in other ways. According to David Knox, current Director of the British Council in Botswana, British teachers have contributed to the Botswana education system in a number of ways: through curriculum development, writing and co-writing school textbooks and organising extra curricula activity (especially sports). He gave a somewhat picturesque example, when he claimed that “the Chess Club of Botswana can be traced back to British teachers”.

An experienced senior official made an important point with regard to rural education: he explained that it was useful to have expatriate teachers because the government could send them to places where the local teachers would not want to go, i.e. into the remote areas. There were two advantages to this: it exposed the children in the remote areas to different cultures and people and it gave them some stability because the expatriates would stay for the length of their contract. This compared to Botswana teachers, many of whom did not want to work in the remote areas. Currently, the official explained that “with the decline in the number of expatriates and the non-renewal of their contracts and replacement with local teachers, problems are increasing in placing teachers in the remote areas”<sup>100</sup>.

<sup>100</sup> We discussed this later and the official stated that given the recent oversupply of teachers he was hopeful that the remote areas would get sufficient numbers and quality of teachers. Teachers are no longer in a position to choose where they work.

*Contributions at the school level*

At the school level, many head teachers gave very positive assessments of the expatriate teachers they employed in their schools. Table 3.18 shows the head teachers' assessment of the effectiveness of expatriate teachers compared to the average of teachers employed at their schools.

**Table 3.18 Head Teachers' Assessment of Expatriate Teachers in Botswana**

Effectiveness of expatriate teachers compared to average for the school's staff:	Government schools	Private schools
5 – More effective	4	5
4 – Slightly more effective	0	2
3 – Same as	6	2
2 – Slightly less effective	0	0
Parental feedback about expatriate teachers:		
Positive	1	5
Mixed	1	2
Negative	0	0
No feedback	8	2
Do expatriate teachers make an extra contribution ?		
Yes	7	7
No	3	2

Head teachers of government schools most commonly assessed expatriate teachers as having the same effectiveness as other teachers, although a substantial minority rated them as more effective. However, there were two qualifications made by head teachers. First, some said that the expatriates were, on the whole, better qualified, and it was not fair to make comparisons. For example, a head teacher in an urban senior secondary school said that “Most of the expatriates are very experienced. They are being replaced by local teachers who are newly qualified”. Secondly, it was pointed out that expatriates were employed on a contract and therefore were under more pressure to prove them than the locals (who were employed on permanent and pensionable contracts) do. As one head teacher in a rural CJSS stated: “Some of the teachers who have come from bad economies (Zimbabwe and Zambia) want to ensure their contracts are renewed. They have to survive and need to keep their jobs. There is nothing for them back home.”

Head teachers at private schools tended to assess expatriate teachers more favourably, although it should be borne in mind that all these head teachers themselves were expatriates. One said it was a difficult, possibly an unfair, comparison to make because he employed very few local staff. Two of the head teachers felt the expatriate teachers put in more effort because they wanted to keep their jobs in order to remain in Botswana. The point about experience was also raised by the head teachers in private schools.

The head teachers' assessment of teaching effectiveness was broadly consistent with what they reported about parental feedback about expatriate teachers. Within government schools, most head teachers reported no parental feedback. However, the majority of private schools reported positive feedback (possibly not surprisingly given the parents were paying fees). In schools where parental feedback was said to be mixed, it was said that some parents had complained about an expatriate teacher's accent.

A clear majority of head teachers of both government and private schools agreed that expatriate teachers made an extra contribution to the school by virtue of coming from another country. Five mentioned the cultural contributions to the school through, for example, music, dance, food and traditional costumes. Nine mentioned the contribution made through extra-curricular activities, particularly in sports and debating, and one mentioned specialist knowledge. A head teacher from a rural CJSS explained how the expatriate teachers "have ample skills and these are used to assist the whole school. For example they share their computer skills and teach the local teachers/students how to use computers". Two head teachers said they wanted to qualify their comments because only some of the expatriate teachers made an extra effort. In both qualitative and quantitative terms, it is evident that expatriate teachers have made a very positive contribution to the development of the government schools and to the private school sector in Botswana.

### *Individual teachers*

For those teachers from developing countries salary was the main motivating factor causing them to migrate to work in Botswana. There clearly have been individual benefits for these teachers. The average salary before working in Botswana was pula 1670.87 per month<sup>101</sup> compared with an average starting salary of 2451.17 pula per month.

Nearly half the teachers have undertaken some form of professional development and despite some negative experiences, many of the expatriate teachers have very warm statements to make about teaching and living in Botswana. A Ghanaian stated: "Everything is well organised in terms of contract, permission to teach from the Ministry of Education and availability of teaching materials and remuneration". A Kenyan wrote: "Botswana is a peaceful country. There's political and economic stability. The salaries and working conditions are better". A Trinidadian noted: "It is culturally enriching and fulfilling". A British teacher stated it has been positive because it allowed a "broadening of one's life experience and gaining knowledge of other cultures. To provide a different perspective on life". Many of the teachers recognise the benefits to themselves of working in a different culture. A British teacher stated: "Undoubtedly, I have been able to develop professionally here by helping to introduce new curricula and now I'm writing a textbook". A Zambian noted that s/he had "learnt to live with people who are not your own relatives in peace...Huge tolerance developed in order to accommodate others both at work and in the local community". A Zimbabwean stated that international recruitment was a good thing "because it provides an open forum for sharing of ideas, theories and experiences". There is little doubt that the individual expatriate teachers have benefited financially and as professionals through working in Botswana.

<sup>101</sup> There was a very large difference in the salaries that teachers from developing countries had been receiving prior to their arrival in Botswana.

### *Implications for other developing countries*

The majority of expatriate teachers in Botswana are from developing countries (see Table 3.12 which gives figures of teachers and country of origin according to the TSM). We are not in a position to comment generally on whether there are teacher shortages in the countries where the expatriate teachers have come from. However, there is some evidence of a negative impact of teacher migration on developing countries. In June 2004, there were eighty-nine Guyanese teachers on government contract working in Botswana. Media coverage of the recruitment of Guyanese teachers in Guyana during 1999 highlighted the concerns of the Ministry of Education at the loss of the teachers and the fact that they clearly could not compete with Botswana in terms of salary or working conditions. As the Minister of Education stated in April 1999: "We cannot cope with the competition financed with the diamonds of Botswana" (*Stabroek News*, April 23, 1999).

In Kenya, the introduction of free primary education in January 2003 led an increase of 1.5 million pupils. This has led to enormous pressures on the primary system. The Kenyan National Union of Teachers has argued that 60,000 primary school teachers need to be hired. However, Dr. Mwiria from the Kenyan government was quoted as stating: "We do recognise teacher shortages but I doubt whether they affect the whole country. What is needed is to remove teachers from overstaffed schools to those that are understaffed" (Ochieng: 2005). A Kenyan Ministry of Education commissioned report, published in May 2005, found that the shortage of 32,000 teachers could be addressed through ensuring teachers worked longer hours (*The Standard*, May 6, 2005). However, financial constraints may also be a factor in this view as according to a report from a Dutch Teachers' Union, "The World Bank demanded a decrease of staff in order to cut on Government expenditure. The previous government met that demand, resulting in over 30,000 qualified teachers being unemployed" (Erve, 2003:1). The situation in Zambia is more complex. A report by the Global Campaign for Education (GCE), Oxfam and Voluntary Services Overseas (VSO) in September 2004 stated that the shortage of teachers in Zambia was the result of International Monetary Fund (IMF) policies. An agreement signed by the Government and the IMF led to the need to reduce the government wage bill. The GCE argued that it was this policy which had led to a shortage of teachers. The IMF responded to this report. Thomas Dawson of the External Relations Department at the IMF argued that this was not the case but explained that a lack of money meant the Zambian government was unable to pay the retirement costs of 7,000 teachers who were due to retire. Therefore, 7,000 teachers could not be hired to replace them until the situation was resolved (Dawson, 2004<sup>102</sup>). The key point is that in Kenya and Zambia there were a large number of unemployed, trained teachers who were unable to find employment.

In the case of Kenya and Zambia, teacher mobility at least ensures that teachers are employed and can provide for their families, through remittances. However, teachers in Guyana were leaving positions within schools, rather than being previously unemployed. Migration thereby created vacancies within the education system. This south-south migration of teachers underlines the complexity of labour migration.

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<sup>102</sup> This response can be found on the IMF website at: <http://www.imf.org/external/np/vc/2004/111804.htm>

In terms of the responses to the questionnaires, it is important to note that a very small percentage of those who responded to our questionnaire stated unemployment was the reason why they left their country to seek work in Botswana. This implies that most of the expatriates had been working in the education system in their home country (or a third country) prior to taking up employment in Botswana.

### *Adding value?*

Aside from the possible financial benefits which may accrue to the countries of origin as a result of teacher migration (we discuss this below), another important possible benefit is found through the added value that teachers might bring to the education system on their return. This requires that teachers return and that they re-enter the education system. It may be inferred that teachers will have developed additional skills through the challenges of working in another culture. However, a more precise measure of ‘added value’ arises when the extent to which they have received formal professional development is examined.

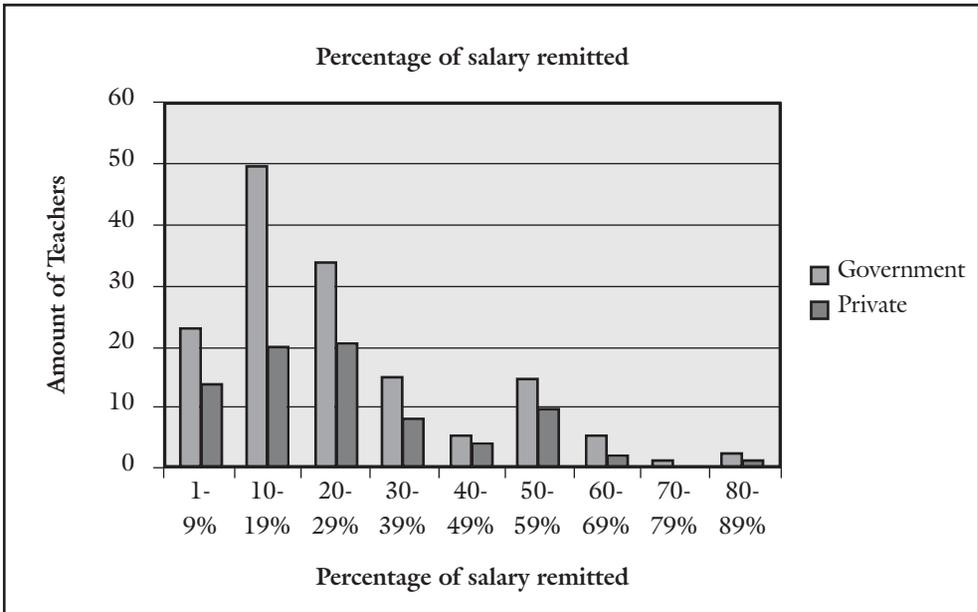
72.5% of all expatriate teachers who responded to the question plan to return home. They were then asked what they planned to do upon their return. Among the teachers from developing countries, 55% of those who responded plan to be self-employed compared to 10% who plan to work as a teacher and 22% who want to work in education. A small percentage of the sample will be directly using their additional experience to contribute to schools, while just over a fifth will indirectly use their experience to enhance education in their home country. In total, one third (33%) will be adding value to the education system when they return home. Of those, slightly less than half (42) of the 88 teachers who plan to work in education related employment have undertaken professional development, compared to 47 who have not.

The other very interesting statistic is that a majority of teachers plan to be self-employed. This implies that teachers will have saved enough capital to allow them to establish their own businesses upon return to their home country. This clearly has positive repercussions for developing country economies.

### *Financial benefits*

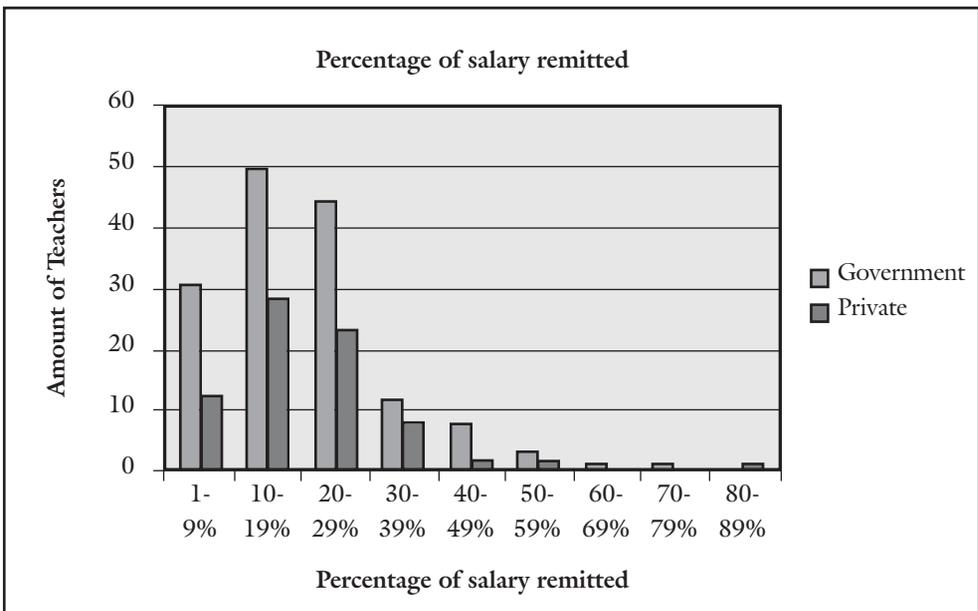
One of the positive benefits for developing countries of migration is the level of remittances and savings made by the migrants while they are working outside the country. The table on the next page highlights the money remitted and saved by teachers from developing countries working in Botswana. The levels of remittances are high, with an average of 18% of salary being remitted by teachers from developing countries. The relative strength of the pula compared to other developing country currencies was mentioned by a couple of the expatriate teachers. A South African teacher stated: “The exchange rate benefits South Africans by increasing any money sent home”. A Malawian head teacher explained that he believed he could do far more for the development of his country by sending money home than he could do by working in his country, particularly because the pula was so much stronger than the Malawian kwacha.

Figure 3.5: Percentage of Salary Remitted by Expatriate Teachers from Developing Countries



Another contribution that expatriate teachers can make to their own economy is through the savings accrued by working abroad. We have included all teachers from developing countries in this analysis, even those who have said they are not planning to return home, because we cannot predict what they plan to do with their savings. They could be using them to invest in their home country at a later stage. The average percentage of salary saved per month is 13%.

Figure 3.6: Percentage of Salary Saved by Developing Country Expatriate Teachers in Botswana



### 3.4 Projected teacher supply issues

#### 3.4.1 The impact of HIV/AIDS

It is not possible to discuss any issue of labour supply in Botswana without discussing HIV/AIDS. Its impact on the teacher population has been examined by Bennell et al (2002). The conclusion they draw is that HIV/AIDS is unlikely to have a devastating impact on the levels of teaching staff. This view is supported by the Ministry of Education. Teacher mortality levels have remained stable since 1999, and if anything have shown a slight decline. With the introduction of free anti-retroviral (ARVs) drugs, there is little overt concern about the impact of HIV/AIDS on the projected supply of teachers. However, given the gestation period of the virus and the fact the Ministry does not know how many teachers are HIV+, it is difficult to predict the longer-term impact. On the positive side, teaching about the problems of HIV/AIDS is now an integral part of the curriculum and a weekly television programme “Talk Back on HIV and AIDS” is broadcast to all schools. Of all members of the population, teachers will be among the best informed about the causes and consequences of HIV/AIDS.

HIV/AIDS has other ramifications, particularly the attrition of staff from the education service as a result of shortages of educated personnel in the private sector. A senior education official said a trend was developing and the private sector representatives argued that teachers were much easier to train for private sector jobs because they already had a level of training and professionalism. However, there are no available figures on this. Another factor is the desire of teachers to be placed in urban or peri-urban areas in order to access ARVs. As the Minister of Health noted in her preface to the report *Botswana 2003. Second Generation HIV/AIDS Surveillance*, “rural prevalence is on the increase while urban prevalence is stabilising. This might be a reflection of the disparity of intervention programmes nation-wide” (NACA 2003: iii). These developments will need to be monitored in terms of their impact on the possible increase in recruitment of expatriate teachers.

#### 3.4.2 Labour force planning

There are clearly problems with the planning of teacher supply in Botswana. A report undertaken in 1996 found that the lack of reliable data “brings the forecasting of teacher supply and planning of teacher allocation in certain cases close to a ‘trial and error’ exercise<sup>103</sup>”. This was confirmed during interviews. One official stated he had been working for many years to develop a more coherent system of communication and planning between the schools, teacher training colleges and the Ministry, but to little avail.

## Conclusions

It is clear that expatriate teachers have made an important contribution to the development of the education system in Botswana, particularly in facilitating the rapid expansion of the secondary schools. Expatriate teachers have contributed in a variety of ways through curriculum development, cultural exchange and support for local teachers. In recent years, the level of

<sup>103</sup> Göttermann-Duret and Hogan (1998:27).

international recruitment has declined although it is likely to continue in the shortage subjects for a number of years as local capacity continues to be developed.

Teachers from developed countries, particularly Britain, have been an important source for the Botswana education system. That said, the vast majority of teachers currently teaching in Botswana are from other developing countries, most notably Zambia, Zimbabwe, India and the Caribbean. They have been attracted to teaching in Botswana by the higher salary levels and opportunities for professional development. In addition, the relative political, economic and social stability in Botswana is also attractive to teachers from other African countries in particular.

Expatriate teachers have tended to be male, older, experienced and well qualified. A significant number of them, 27.5%, do not plan to return home, though there are a variety of reasons for this, both positive and negative. Of those that do plan to go home to developing countries, only 10% want to work as a teacher, and 22% in an education-related profession, though this was not defined more precisely, while 55% plan to be self-employed. We are unable to comment on the possible negative impact of the loss of teachers from developing countries to Botswana, but we do know that teachers remit and save a significant proportion of their income, thereby contributing to their home economies. On average, teachers in Botswana from developing countries remit 18% percent of their salary and save 13%.

## Chapter 4: Receiving Country: England

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### Introduction

The recruitment of overseas trained teachers from Commonwealth countries to work in England has been at the heart of the debates about the migration of trained teachers amongst Commonwealth Ministers of Education. The then South African Minister of Education, Kadar Asmal, in February 2001, accused the British recruitment agencies of ‘poaching’ teachers. These concerns, along with those expressed by Caribbean member states, led to the development of the Commonwealth Working Group on Teacher Recruitment which drafted the Commonwealth Protocol on Teacher Recruitment that was signed at Stoke Rochford on 1st September 2004 (see Appendix A). Concerns focused on the recruitment of teachers from developing countries to developed countries within the Commonwealth. England is the main developed country that recruits teachers from other parts of the Commonwealth.

This chapter examines the reasons why English schools recruited overseas trained teachers, how they undertook that recruitment and who they recruited. It will explore the profiles of teachers who were recruited, examining their experiences of the recruitment processes and discuss the costs and benefits of that recruitment for England and the sending countries from which it has recruited.

### 1. The education system

The central administrative unit which oversees education policy in England is the Department for Education and Skills (DfES). There are several other agencies that are involved in different aspects of national education management. The Teacher Development Agency (TDA<sup>106</sup>) is responsible for recruiting<sup>107</sup> and training teachers and for supporting schools with professional development. As part of the professional development, the TDA works with a number of providers to train teachers (in universities and schools). The TDA also manages the Overseas Trained Teacher (OTT) programme. This is provided for overseas teachers through a number of Designated Recommended Bodies (DRBs). The General Teaching Council (GTC) is the professional body for teachers. As part of its remit it registers all teachers who have gained Qualified Teacher Status (QTS). It does not register overseas trained teachers unless they have gained QTS.

England is divided into ten government office regions and within those regions there are 150 Local Education Authorities (LEA). The role of the LEA is to oversee the development of educational provision at the local level. The actual management differs considerably according to each LEA<sup>108</sup>. In terms of recruitment, LEAs determine their own policies. While some LEAs have developed and manage their own pool of supply teachers, others have undertaken overseas recruitment either alone or in partnership with private recruitment agencies. However, in general, recruitment is normally undertaken by the schools themselves, many of which form relationships with private recruitment agencies. This process will be discussed later in the chapter. It is important to recognise that there is no single approach to the recruitment of overseas teachers in England.

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<sup>106</sup> The TDA used to be the Teacher Training Agency. There are references to the TTA Newsletters in the text.

<sup>107</sup> The TDA does not recruit overseas trained teachers.

<sup>108</sup> For example, Bradford LEA is managed by a private firm, SERCO.

The statistical information shown in the three tables below was gathered by the DfES through *Form 618g* which schools complete in January of each year. The latest available statistics are from January 2004 and, as the table below highlights, there were 8.3 million pupils registered in government maintained and independent schools in England. The table below gives a gender breakdown of students in government maintained primary and secondary schools.

**Table 4.1: Pupil Enrolment in Primary and Secondary Schools, January 2004**

	Boys	Girls	Total
Primary	2, 029, 760	1, 942, 930	3, 972, 690 <sup>107</sup>
Secondary	1, 673, 380	1, 651, 070	3, 324, 450 <sup>108</sup>

Statistics of Education: Schools in England, 2004 edition.

In January 2004, there were 17, 762 primary schools, 3, 409 secondary schools and 1,148 special needs schools. Pupil-teacher ratios in primary schools were 22.7:1, in secondary schools, 17:1, and in special needs schools, 6.3:1<sup>109</sup>.

Not all teachers employed in English schools are defined as 'qualified to teach'. This means they do not have Qualified Teacher Status (QTS), which has been defined by the TDA as a set of standards which "are designed to make sure that teachers have the subject knowledge and teaching expertise to teach pupils of compulsory school age in maintained schools in England" (TTA: 2003). It comprises professional values and practice, knowledge and understanding, and teaching. The TDA explain that every teacher must have QTS in order to teach in England, however, overseas trained teachers can work in England for four years without QTS. Overseas trained teachers<sup>110</sup> can be assessed and pass QTS. If they are not judged to have met the standards they can pursue QTS through the Overseas Trained Teacher (OTT) Programme, if their school supports them.

The table below shows a breakdown of the number of teachers who have QTS, who do not have QTS and those who are currently in the process of obtaining it.

**Table 4.2: Numbers of Qualified and Non-qualified Teachers**

Sector	QTS Teachers	Non-QTS/Instructors	Obtaining QTS	Total
Primary	190,100	4,100	2,300	196,400
Secondary	203, 800	7,200	3,800	214,700
Special Needs	13,300	800	200	14,300

Statistics of Education, Schools in England, 2004 edition.

While the information collected by the DfES can give a picture of staffing levels in English schools, it does not present an accurate assessment of how many overseas trained teachers are working in schools. Headteachers are asked to state how many overseas trained teachers and

<sup>107</sup> Part-time pupils need to be added to this number. 142, 910 boys and 136, 940 girls were recorded as part-time pupils in the 2004 national statistics.

<sup>108</sup> Part-time pupils recorded at the secondary level were as follows: 300 part-time boys and 200 part-time girls.

<sup>109</sup> Statistical First Release. School Workforce in England, January 2005.

<sup>110</sup> Teachers from within the European Union do not have to be assessed for QTS as long as their qualifications have been verified by the National Academic Recognition Information Centre (NARIC). This is the result of European legislation.

non-QTS instructors work in the school. Not only will there be British non-QTS instructors included in this category but there will also be overseas trained teachers counted in the separate category of ‘employment-based routes to QTS’. There is no specific question on *Form 618g* that asks how many overseas teachers work in the school.

## 1.1 Overseas-trained teachers

Unlike in Botswana, there are no comprehensive figures on the numbers of overseas-trained teachers working in English schools. As shown above, the DfES statistics do not treat overseas-trained teachers as a separate category on *Form 618g*. The TDA has information on the numbers of overseas-trained teachers that have completed the OTT programme but it is not known what percentage of overseas teachers actually undertakes this programme. Anecdotal evidence, based on discussions with the recruitment agencies, suggests it is a small number. As of January 2005, 3,665 overseas trained teachers had either completed or were undertaking the overseas trained teacher programme. Of those, 71% were female. Whilst the teachers taught a variety of subjects, the main ones were: primary (1050), English (599), mathematics (449), science (440), physical education (168), design and technology (152) and ICT (105). The nationalities of the teachers who have undertaken the programme are extremely diverse. The major nationalities are shown in the table below:

**Table 4.3: Nationality of Teachers on the OTT Programme**

Nationalities	Numbers
South African	721
Australian	424
New Zealander	225
Canadian	147
American	71
Jamaican	67
Kenyan	66
Zimbabwean	50

Source: TTA

Information is also available on the numbers of work permits issued to overseas teachers who come to work in England. However, this information is not complete. First, it includes figures on the number of people who have been given a work permit for a job that includes teaching – it could therefore include nursery teachers and university lecturers. Second, attaining a work permit is only one method by which overseas trained teachers can work as a teacher in England. They can also work in England with the following entry requirements: working holiday visa<sup>111</sup>, ancestral rights, spousal entry, highly skilled migrants programme and through an European Union passport. Figures are available on the number of work permits which have been issued to Commonwealth citizens where the “job includes teacher” and they are contained in the table

<sup>111</sup> The working holiday visa is open to Commonwealth citizens between the ages of seventeen and thirty. Entrants can stay in the UK for a period of two years but can only work for twelve months (the period of time allowed to work was cut from twenty-four to twelve months in February 2005). In order to qualify they must be able to show they can pay for the flight to the UK and they have enough funds to pay for accommodation and living expenses for two months or one month if you have employment.

below. There is a clear decline in the numbers of work permits given out to teachers between 2002 and 2003. The former was the year when the Home Office introduced a pilot scheme to allow teachers to obtain work permits as supply teachers. The programme officially ended in July 2003<sup>112</sup>. This may explain the decline in work permit figures in 2003.

**Table 4.4: Work Permits where Job includes Teaching, 2001 - 2003**

Nationality	2001	2002	2003
South Africa	2010	2542	1492
Australia	1011	1528	1299
New Zealand	609	887	669
Jamaica	381	530	523
Canada	348	513	479
Zimbabwe	194	325	268
India	130	317	174
Ghana	53	123	126
Nigeria	60	90	65
Kenya	39	77	116
Trinidad & Tobago	43	50	44
Pakistan	22	43	49
Mauritius	19	45	47
Uganda	16	22	21
Zambia	16	22	16
Malaysia	16	17	33
Guyana	8	21	30
Sri Lanka	10	16	15
Barbados	15	9	8
Singapore	9	10	19
Cameroon	10	5	15
St. Lucia	5	10	1
Namibia	8	6	8
Malawi	3	10	4
Malta	5	8	6
Seychelles	2	10	8
Sierra Leone	4	8	3
Cyprus	7	3	2
St. Vincent	2	5	6
Bangladesh	1	3	7
Tanzania	3	1	2
Swaziland		3	2
Antigua	1	1	
Botswana	-	1	6
Papua New Guinea	1	-	-
Samoa	1	-	-
St. Kitts	1	-	1
Vanuatu	1	-	-
<b>Total</b>	<b>5064</b>	<b>7261</b>	<b>5564</b>

Source: Work Permits UK

<sup>112</sup> This followed a notorious case where teachers were left stranded having signed contracts with the recruitment agency, Teaching Personnel. As the Times Educational Supplement reported in September 2002, "This move aims to stop agencies bringing large numbers of staff to the UK on year-long contracts and then failing to find them work, a problem which has been reported in cities including London and Birmingham" (Times Educational Supplement, 27 September, 2002).

Due to the nature of overseas teacher recruitment and the methods of data collection, it is not possible to state how many overseas teachers currently work in England<sup>113</sup>.

## 2. The context to international recruitment

This section examines the international recruitment of overseas-trained teachers to England. The focus of the discussion is on the post-2000 period although as LeMetais (1990) has pointed out there have been acute teacher shortages during other periods<sup>114</sup>.

### 2.1 Teacher shortages: An explanation

A study undertaken by Robinson and Smithers (1998) examined the reasons which lay behind teacher shortages during the late 1990s. The main conclusion they drew from their research was that: “current and recurring difficulties in teacher supply arise because the salaries and working conditions of teachers have never been fully adjusted to take account of the fact that teaching these days has to compete in an open market for graduates” (Robinson and Smithers, 1998:2).

In a report commissioned by the National Union of Teachers (NUT) and published in 2000, head teachers reported that half of vacant posts were difficult to fill and a fifth of posts were very difficult to fill. Shortages varied according to subject area and geographical location. The posts that were difficult to fill were in the areas of: mathematics, sciences, design and technology, physical sciences, home economics and religious education (Smithers and Robinson, 2000). Head teachers were also clear that they did not admit to shortages because it could affect the school’s reputation and might lead to parents not wanting to send their children to the schools. As one head teacher commented: “It is all hidden. You would never talk about any of that simply because if it got into the local newspapers it would be seen as quite damning” (Smithers and Robinson, 2000: 27). However, in July 2000, teacher shortages did hit the headlines, as it was reported that a head teacher in Kent had failed to recruit mathematics teachers after an eight-month world-wide search produced six applicants, none of which was suitable. The school had decided to retrain two of its administrative staff as mathematics teachers. According to the same report, “mathematics teacher vacancies have risen by 66% in the past twelve months” (*The Times Education Supplement*, 29 July, 2000). In December 2000, it was reported that an emergency meeting was to be held in Whitehall “to try to avert a winter crisis in Britain’s classrooms that could see pupils sent home” (*The Observer*, 10 December, 2000). Proposals to be discussed included “four-day weeks in schools and fast-track recruitment, to action to attract teachers from abroad and bring back those who have left the profession” (*The Observer*, 10 December 2000). Overseas recruitment at this point was being seen as part of a package of measures which could provide a quick fix to the crisis afflicting schools’ particularly in the South East<sup>115</sup>.

<sup>113</sup> More accurate information may become available as a result of changes to the Quality Mark as a direct result of the Commonwealth Teacher Protocol. Please see later discussion in the main text.

<sup>114</sup> LeMetais (1990:6) stated that Her Majesty’s Inspectorate (HMI) had found that there were acute teacher shortages during the late 1980s in secondary schools, particularly in the area of mathematics, science, foreign languages and craft, design and technology.

<sup>115</sup> According to the report, “Four schools in the South-east – where the problem is greatest – have already been forced to send children home this term while others have shared one teacher between two classes” (*The Observer*, 10 December, 2000).

By 2000, it was evident that in some parts of the country, schools were already reliant on the recruitment of overseas teachers to plug the gaps. As one head teacher interviewed by Smithers and Robinson acknowledged: "Overseas teachers are absolutely crucial to us. If we took out the Australians, I don't know what we would do. I really don't. When I say Australians, I also mean New Zealanders and South Africans" (Smithers and Robinson, 2000: 23). In fact, some schools were suffering as a result of a shortage of overseas teachers in 2000: "[T]his year many teachers who normally come from Australia and New Zealand have stayed at home because of the Olympics in Sydney, the millennium celebrations and their countries' own teacher shortages" (*The Observer*, 10 December 2000)<sup>116</sup>. In August 2001, the Chief Inspector of Schools in England, Mike Tomlinson, said teacher shortages were the worst for 36 years. The shortage subject areas were mathematics, English, science and technology (*The Times Educational Supplement*, 31 August, 2001)<sup>117</sup>.

The issue of teacher shortages is not solely linked to the number of people attracted to the profession but also to the retention of teachers in the profession. Smithers and Robinson, in research undertaken in 2001, found that "[O]f every 100 final year students, 40 do not make it to the classroom" (Smithers and Robinson, 2001: i). The factors identified as impacting upon the decision to leave the profession were: workload (57.8%); pupil behaviour (45.1%); government initiatives (37.2%); and salary (24.5%); and stress (21.6) (Smithers and Robinson, 2001:i). As Smithers & Robinson state: "[T]he huge drop-out rate post-training and the hike in resignations means that any increase in applications and trainees is being largely dissipated" (2001:ii). Concerns expressed at the beginning of 2003 related to the poor retention level of teachers in the profession. The head of the General Teaching Council, Carol Adams is quoted as stating "We need to address this drift if we are to stop one in three qualified teachers who enter the classroom from leaving by their fifth year. With average costs of around £13,000 to train and employ a secondary subject specialist, this is not good value for money" (*The Guardian*, 7 January, 2003). A study recently conducted for the DfES by Smithers and Robinson (2005) found that teacher turnover has remained at the same level over the last three years (14.7% in primary schools and 12.5% in secondary schools). However, their study confirmed that "secondary schools with the more challenged pupils in terms of ability, social background and special needs were more likely to lose teachers to other schools" (Smithers and Robinson, 2005: 2).

The DfES argue that the teacher recruitment crisis is being addressed through the introduction of a number of different incentives: bursaries for training; golden handshakes and golden hellos for trainees and teachers in subject shortage areas; repayment of student loans of certain categories of teachers; the introduction of soft loans for public sector workers in the capital; and retention allowances<sup>118</sup>. There is evidence that there are surpluses of certain teachers in certain areas of the country, according to the Deputy General Secretary of the NASUWT: "Areas of teacher shortages are patchy, as are areas of surplus. It is a question of matching the two things up" (*The Times Education Supplement*, 14 January, 2004). An official at the DfES does not

believe that teacher shortages will be a problem in the near future because of falling pupil rolls, increases in the numbers of people training to be teachers and the introduction of the Higher Level Teaching Assistants (HLTA). By 2008, the DfES estimate there should be at least one HLTA in each school. However, others have expressed concern about the continuing shortages in certain subject areas, and more generally, about the large number of teachers due to retire in 2006.

## 2.2 The international recruitment process

Changes in regulations in the late 1980s meant the onus for recruiting teachers was placed squarely on the schools themselves. Local Management of Schools (LMS), coupled with the inefficient operation of the LEA supply pool of teachers, led to the growth of private recruitment agencies supplying teachers. A report by the Institute for Public Policy Research in 2001 estimated that 70 % of all supply teachers were provided from the private sector during 1998-1999 (Barlin and Hallgarten 2002:73, quoting IPPR, 2001). The majority of overseas trained teachers in England are recruited through these recruitment agencies. However, overseas trained teachers have also been recruited by Local Education Authorities (either individually, in consortia or in partnership with recruitment agencies) and by individual schools. It is also important to note that not all overseas trained teachers are directly recruited. Some come to England on their own initiative or apply directly to schools via the internet.

### *Recruitment agencies*

Recruitment agencies are private companies which have developed since the late 1980s. Some recruitment agencies are small operations which focus solely on the recruitment of British teachers, other have some overseas recruitment whereas others concentrate the majority of their recruitment on the overseas markets. The larger recruitment agencies which have focused on the overseas markets have established offices based in certain countries. Australia, New Zealand, Canada and South Africa are the main countries where agencies have set up offices. The staffs in such offices undertake recruitment campaigns, interview prospective teachers, run police checks and verify qualifications. Some agencies have focused on the recruitment of teachers on work permits<sup>119</sup> whereas others concentrate on the recruitment of teachers who can access the working holiday visas, have ancestral rights, an EU passport or spousal rights. Those teachers who are recruited and access a work permit come to work in a specific job. Those who come to England on the working holiday visa<sup>120</sup> will come and work as supply teachers (either on a long-term placement or as daily supply). These teachers do not have a guarantee of work. The expansion of the internet in recent years has led to the possibility of global recruitment. The majority of the agencies have a website and an online initial application process. One of the larger agencies visited during the course of the research had received 6,500 online applications from overseas trained teachers during 2004.

<sup>119</sup> The agencies can no longer recruit teachers on work permits without a specific job being available. However, some recruitment agencies will undertake the paper work on behalf of the school.

<sup>120</sup> The teachers who come on working holiday visas can apply for a work permit before their holiday visa expires.

Agencies also work in partnerships with Local Education Authorities to undertake specific recruitment drives. For example, members of the agency will organise a recruitment campaign, travel to the country with a head teacher or group of head teachers, and undertake the selection process themselves. The agency will cover the costs of this exercise<sup>121</sup>. A report in the *Times Education Supplement* in April 2001 listed some of the LEAs that had taken part in these recruitment drives. They included: Croydon; Hackney; Hammersmith & Fulham; Lewisham; Newham; Tower Hamlets; Waltham Forest; and outside London, Manchester and Hertfordshire (*The Times Education Supplement* 06 April 2001). Alternative and cheaper methods of recruitment reported included the use of video-taping candidates and allowing head teachers to watch the videos and video-conferencing so head teachers could have face-to-face interviews with the prospective teachers<sup>122</sup>.

Recruitment agencies are regulated by the Employment Agency Standards Inspectorate and agencies are inspected to ensure they are complying with the legislation. In 2002, the DfES introduced a further code of conduct for agencies involved in the recruitment of teachers. This voluntary code, known as the Quality Mark, is managed by the Recruitment and Employment Confederation (REC). Relevant provisions from the Commonwealth Teacher Protocol (signed in 2004) have been incorporated into the recent redrafting of the Quality Mark (2005). Agencies have to reapply for the Quality Mark every two years and they are audited by the REC to ensure they meet the criteria before the Quality Mark is granted. All of the agencies visited over the course of the research did have the Quality Mark and a number had recently been audited or were going through the audit process<sup>123</sup>. As of May 2005, 55 agencies had the Quality Mark and 28 were in the process of obtaining it. However, as it is a voluntary code there is no legal requirement for agencies to have the Quality Mark.

### *LEA recruitment*

LEAs have experienced and managed teacher shortages differently. While some have undertaken overseas recruitment with agencies, others have organised their own recruitment missions. One London borough visited during the course of the research had organised three recruitment drives in Australia between 2001 and 2003. Head teachers from the borough went on the recruitment drives along with LEA recruitment staff. They decided to organise their own recruitment because of unacceptably high vacancy rates within the LEA and it was decided it would be more cost-effective than contracting an agency to do it. The team were recruiting for specific vacant positions. During the visit, the head teachers interviewed the prospective candidates, emailed information about the successful candidates back to schools with vacancies so the head of the school could decide whether the candidate was suitable. Teachers recruited from overseas by the LEA were employed on the same terms and conditions as British teachers,

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<sup>121</sup> One recruitment agency gave an estimate for a two-week overseas recruitment mission for a Local Education Authority of around £25,000. This money was recouped through an agreement that the agency would supply the teachers at a supply rate for one year. At the end of that year, the teachers would become permanent employees of the Local Education Authority and would not pay the normal fee that agencies charge when a supply teacher is given a full-time position.

<sup>122</sup> Head of Education personnel of Surrey County Council, John White, explained that seventeen teachers had been recruited from Nigeria: "Within twenty-four hours, two of our schools had taken five of the teachers from Nigeria between them. The agency had brought back taped interviews with the teachers and the schools took them on that basis – it is up to the school if they are satisfied on that basis" (*The Times Education Supplement* 20 July 2001).

<sup>123</sup> Angela Nicholls, the QM auditor at the REC, explained that the auditing process was a rigorous one and that if the agencies did not meet the standards, they were sent a letter explaining what improvements they would need to make before being re-audited.

were guaranteed a job on arrival and were given assistance to settle in (find accommodation, open a bank account etc) by a company called Britbound<sup>124</sup>. The recruitment manager said the process had worked well and only one teacher had returned to Australia before the end of their contract. However, the recruitment manager does not envisage the need for more overseas recruitment as vacancies are manageable at present and, he believes, will remain so in the near future. LEAs can apply for the Quality Mark but according to Angela Nicholls, the Quality Mark auditor at the REC, very few LEAs have so far made an application<sup>125</sup>. LEA recruitment is also not covered by the Employment Agency Standards Inspectorate.

### *Pan-London recruitment initiative*

The Pan-London overseas recruitment was an initiative driven by the Teacher Recruitment and Retention Unit (TRRU) of the Government of London Office. Established in 2002, the remit of the TRRU was to assist LEAs in London with the recruitment and retention of teachers<sup>126</sup>. Included within this was the development of a pan-London overseas recruitment initiative. Following a series of meetings, seven LEAs decided to co-operate on a joint overseas recruitment initiative. Each LEA paid £10,000 and the DfES also contributed £10,000. Two recruitment trips were undertaken: one to Australia (thirty-eight teachers were recruited) and another to Canada. Prospective candidates registered via a website ([www.noagencynoworries](http://www.noagencynoworries)) and were interviewed in the country. The details of successful candidates were uploaded via the website to head teachers with vacancies within the seven LEAs and decisions were made about who to recruit. There were advantages to the teachers because they knew they were coming to a specific job and they were employed on LEA or school terms and conditions. The initiative ended in 2004 as a result of the declining need for overseas trained teachers. According to Paul Jennings of the TRRU, this was partly because schools had become more successful in 'growing their own' teachers through the various initiatives such as the Graduate Training Programme.

### *School-based recruitment*

The other form of overseas recruitment has been undertaken by individual schools. Usually as a result of informal or professional contacts, head teachers from large secondary schools with vacancies have undertaken their own recruitment exercises. There is no monitoring or auditing of school based recruitment.

There are a variety of ways in which overseas-trained teachers are recruited to work in schools in England. The process is decentralised in contrast to the recruitment process which occurs in

<sup>124</sup> Britbound is a private company that was established in 2001. It offers arrival packages for people arriving to work in the UK. According to its website, it has offered this service to the Government of London office, Greater London Boroughs and County Councils in the home counties (<http://www.britbound.co.uk>)

<sup>125</sup> The recruitment manager interviewed for the project said he believed their recruitment standards were very robust and there was no need to go through the Quality Mark procedures.

<sup>126</sup> The TRRU had also been an important driver behind the Preferred Suppliers List (PSL). This initiative was a method of developing an approved list of agencies which met criteria such as transparency of pricing and the provision of career professional development for supply teachers. Schools were not compelled to use these agencies but they were strongly recommended to use agencies on the PSL by the LEAs and the GoL. Agencies on the PSL have to have the DfES Quality Mark in order to qualify.

Botswana. As a result of this fragmented process it is impossible to locate centralised data on the numbers, ages, sex and origins of overseas-trained teachers working in English schools<sup>127</sup>.

### 3. Data collection

#### 3.1 Data collected on school visits

Eighteen schools in two urban locations were visited during the English fieldwork. We decided to concentrate on the urban areas as existing evidence<sup>128</sup> suggested that this was where the majority of overseas trained teachers (OTTs) were employed<sup>129</sup>. Using the Edubase national list of schools, we randomly sampled 300 schools in the two locations of London (200 schools) and Birmingham (100). A letter was sent to the head teacher explaining the nature of the research. The head was requested to return the letter indicating whether there were any overseas teachers working in the school and whether they would be willing to participate in the research. We had a 45% response rate from London schools (79 from primary schools and 11 from secondary schools). The response rate from Birmingham was slightly lower at 39% (32 primary schools and 7 secondary schools).

Four possible combinations of responses to the questions were asked of the Head Teacher.

- Option 1 Yes, the school had OTTs and it would participate in the research (Y/Y)
- Option 2 Yes, the school had OTTs but it would not participate in the research (Y/N)
- Option 3 No, the school did not have OTTs and it would not participate in the research (N/N)
- Option 4 No, the school did not have OTTs but it would participate in the research (N/Y)

The tables below show the responses received from London and Birmingham primary and secondary schools.

**Table 4.5: Breakdown of Responses by School Type**

	Primary				Secondary			
	Y/Y	Y/N	N/Y	N/N	Y/Y	Y/N	N/Y	N/N
<b>London</b>	40	17	6	16	6	3	0	2
<b>Birmingham</b>	3	2	9	18	3	2	0	2

From these responses, another random sample of those schools willing to participate in the research was undertaken and interviews were organised. One of the schools which had

<sup>127</sup> The need to collect comprehensive, national data is important. A survey undertaken by McNamara et al (2005) for the National Association of Schoolmasters/Union of Women Teachers (NASUWT) had higher responses from overseas trained teachers working in primary schools (65%). Of the 35% of respondents who worked in secondary schools, the most common subject taught was English and then PE (McNamara, 2005: i). These results are different from our own survey.

<sup>128</sup> Interviews conducted with recruitment agencies suggest that at least one specialises in placing teachers in positions outside of the major urban areas, for example, one agency had placed a number of teachers in Doncaster and Peterborough. Evidence also emerged of overseas-trained teachers being recruited to work in Lincolnshire.

<sup>129</sup> In the absence of figures, there was little option but to rely on anecdotal evidence.

responded positively was unable to participate so another school was randomly chosen as a replacement.

As Table 4.5 shows, there were problems selecting a secondary school that did not have overseas-trained teachers and that was willing to participate. Another random sample of 100 secondary schools in London (66 schools) and Birmingham (34 schools) from the Edubase list was undertaken. Letters were sent requesting assistance from schools which did not have OTTs and would be willing to take part. This also failed to elicit positive responses. Eventually a member of the advisory group assisted in the location of a secondary school in the greater London area that agreed to participate<sup>130</sup>. The table below gives details of the schools visited in England.

**Table 4.6: Schools Visited**

Type of School	London (Inner and Outer)	Birmingham	Total
Primary	5	3	8
Secondary	5	2	7
Special Needs	3	0	3
<b>Total</b>	<b>13</b>	<b>5</b>	<b>18</b>

Questionnaires were left at the schools for all of the teachers (local and overseas trained). There was a 21% response rate. Dr Sives and Mr Salebona Simelane input the data.

### 3.2 Survey

In the light of school visits, it was decided to modify the original survey used in Jamaica, Botswana and South Africa. Using the Edubase list, 1000 English schools (500 primary and 500 secondary (including special needs schools)) were randomly sampled. There was a 37% response rate listed in the table below.

**Table 4.7: Survey Response**

Type of School	Response
Primary	189
Secondary	172 <sup>131</sup>
Special Needs	7
Unknown	5
<b>Total</b>	<b>373</b>

<sup>130</sup> It was not the case that there were no secondary schools that did not employ OTTs. However, it was presumed that these secondary school heads saw little reason to participate in research which was not directly relevant to their concerns, which given the time pressures they work under, is not surprising.

<sup>131</sup> Two schools with overseas trained teachers at the time of the survey were involved in the League for the Exchange of Commonwealth Teachers (LECT).

### 3.3 Overseas trained teacher responses

The schools visited did not have a large number of overseas-trained teachers working in them, so it was decided to use a variety of other routes to distribute the questionnaires. The National Union of Teachers (NUT) kindly supplied a list of school-based officers around the country. Each was sent a letter and a questionnaire and asked to distribute them to any colleagues who were overseas trained. Fifty-five questionnaires were received subsequently. However, it was not possible to establish a response rate, as the total of overseas-trained teachers and their location was not known.

Letters were sent to all of the Designated Recommending Bodies (DRBs) that currently offer the Overseas Trained Teacher programme asking course leaders if they would be willing to participate in the research. Of the 60 institutions that were contacted, 19 responded positively. A total of 446 questionnaires were sent out and 85 responses were received: a 19.5% response rate. The Association of Jamaican Teachers kindly participated by allowing Dr Sives to attend a meeting and to distribute questionnaires. The recruitment agencies that were visited agreed to advertise the project website to their OTTs.

In total, 191 responses from overseas-trained teachers working in English schools were received. Due to the fact that the majority of the responses came from trade union members and overseas trained teachers undertaking the OTT programme, the sample does not reflect the experiences of short-term supply teachers. This could be considered by any further research.

## 4. Findings and discussion

### 4.1 Extent of teacher shortage

#### *Teacher shortage*

At the time of the school visits, five of the eighteen schools were experiencing staff shortages: four secondary schools and one special needs secondary school. No primary schools had staff shortages. The head teachers said the reason for the shortages was a lack of suitable candidates. Specific issues related to the schools were also raised. In three of the schools, the head teachers believed that the high cost of living was hindering their ability to recruit staff. Another school said that behavioural difficulties and a lack of resources had ensured it was difficult to attract suitable candidates to the school. One of the schools was also facing a serious budgetary crisis which meant that permanent teachers were being replaced by agency staff. All of the schools with shortages were based in London.

The responses to our survey confirmed that secondary schools are far more affected by staff shortages than primary schools. As the table below highlights, over half of the secondary schools that responded to our survey are currently experiencing shortages. Only 7% of primary schools have shortages and no special needs schools have staff shortages.

Table 4.8: Shortages of Staff in Schools

Type of School	Current Shortage			
	Schools visited		Survey Response	
	Yes	No	Yes	No
Primary	0	8	13	176
Secondary	4	3	92	76
Special Needs	1	2	0	7
<b>Total</b>	<b>5</b>	<b>13</b>	<b>105</b>	<b>259</b>

### *Past shortages*

Thirteen of the eighteen schools reported that they had experienced staff shortages at some point since 2000. Of these schools, four were primary, seven were secondary and two were special needs. Two of the primary schools were located in London and two in Birmingham. The two primary schools in Birmingham had been unable to find staff due to the bad reputation of the area (high rates of crime). One of the primary schools had experienced staffing difficulties due to being part of the 'fresh start' initiative. The head teacher said no staff applied and she had been forced to head hunt staff she had worked with previously. The fourth school experiencing shortages in London explained one of the problems as the high cost of living in the local area.

Two of the seven secondary schools that had experienced shortages in the past were in Birmingham and five were in London. Three of the head teachers pointed to the high costs of living (all in London) as a factor in their previous staff shortages, two cited behavioural difficulties and one said lack of resources in the school had been a factor. One of the head teachers in the special needs school said that special needs teachers did not tend to move around the area<sup>132</sup> so there was usually a lack of candidates and the other head teacher explained that the extreme behaviour of the children was off-putting and had led to the school developing a bad reputation<sup>133</sup>.

In the schools visited it was evident that there were a number of factors that were specific to the school which helped to explain the shortages of staff. However, the majority of head teachers explained that at the time they had experienced shortages there was a general lack of suitable candidates. The school visits highlighted that staff shortages were more problematic for schools in the past than currently. In the survey, schools were asked to what extent the supply of suitable candidates had changed since 2000?

The answers are given in the table below. It can be seen that more primary school head teachers believe the situation is positive than do secondary school head teachers. Only just over half (51%) of secondary school heads believe the situation has improved or remains the same compared to 75% of primary head teachers. The situation has remained the same for special needs schools.

<sup>132</sup> The head explained that there was only one special needs school in the LEA. Teachers were settled in the area and would not want to commute long distances to another LEA. Moving across to the mainstream school sector would entail a drop in salary.

<sup>133</sup> This particular school was for children with extreme learning and behavioural difficulties. The head teacher stated that when he had first arrived at the school it had been a regular occurrence that children would 'escape' by climbing on the roof of the school.

Table 4.9: Changes in Recruitment since 2000

School	Change in numbers of candidates since 2000			Total
	Improved	Got Worse	Remained the Same	
Primary	32	46	104	182
Secondary	26	82	58	166
Special Needs	0	0	6	6

### *Subject shortages*

Subject shortages (current and past) recorded in the schools we visited are recorded in the table below. The survey responses record those subject shortages that are currently being experienced by schools.

Table 4.10: Subject Shortages

Subject	Number	
	Schools Visited*	Survey
Science	7	69
Mathematics	6	103
Information Technology	4	35
Religious Education	4	17
Music	3	14
Home Science	3	5
Design & Technology	3	33
Other	3	8
English	2	58
Other Languages	2	20
Primary	2	32
Humanities	1	9
Physical Education	1	10
Commerce	1	0
Art	0	2
Special Needs	0	10

\* These are the subject shortages experienced since 2000

### *Impact of staff shortages*

Head teachers in the schools visited were asked to rate, in order of importance, a number of issues facing the school. The head of a secondary school rated insufficient numbers of staff as the most important priority facing the school. This was in the context of current staff shortages and the fact that the head had had to appoint short term cover for twenty-six staff on maternity leave over the previous four years. Serious shortages had also been experienced in science, mathematics, religious education and physical education. Three primary schools rated this as the second most important issue facing them. One of the primary heads explained that given the

high percentage of children with learning difficulties, it would be better to have smaller class sizes. This had been the case in the past but with budget cuts imposed in 1992, this was no longer possible. The head of another primary had a similar experience and said that while they had sufficient numbers of teachers per student, they needed more teachers because of the high percentage of children with learning difficulties and because of the high mobility of the children<sup>134</sup>. All of these schools were located in London. Of the two schools that rated insufficiently trained staff as their top priority, one was a primary school and the other was a secondary school. One primary school and one special needs school rated it as their third priority.

**Table 4.11: Staff Shortages Compared with Other Priorities**

	Priority (1= most important)				Not relevant
	1	2	3	4	
Lack of books / teaching materials	1	1	1	0	15
Difficult Physical Environment	5	3	1	1	8
Insufficient Number of Teaching Staff	1	3	0	0	15
Insufficient Trained Staff	2	0	2	0	14
Other	7	1	0	1	6

The ‘other’ issues facing schools were varied. Four schools (one special need, two primaries and one secondary) complained about the lack of parental involvement in the school. Two schools mentioned the low level of attainment of the children and one school complained about the behavioural challenges they faced. Two schools said they needed more Learning Support Assistants (LSAs). Another school said one of their main priorities was to try and develop a regular group of supply teachers that could cover for when their permanent staff were on training days.

### *Views of British teachers about shortages in their schools*

In total, 30% of British teachers who responded to our questionnaire believed that there was a shortage of teachers in their schools. There was a difference between the primary school staff (14% who believed there were shortages) compared to secondary teachers (40% who believe their school is short-staffed). This is higher than the views of head teachers. Only three of the eighteen schools visited said there were current staff shortages. Of those who said there was a shortage of teachers in their school, only 10% said that the shortage of teachers was the partial result of migration. None of the teachers said it was a direct cause and the overwhelming majority (90%) said it had a minor or no impact at all.

### *Methods of coping with shortages*

Eight of the schools which had experienced staff shortages, currently or in the past, had employed an overseas trained teacher as a method of coping. Two schools had increased class sizes, two schools had employed under qualified teachers, two schools had asked teachers to

<sup>134</sup> None of the primary schools recorded current staff shortages as defined by the teacher-student ratio. However, this masks the reality of staffing levels in some schools.

teach outside of their subject area and one school had dropped subjects from the curriculum. There was a clear sense in which heads were attempting to address the long-term issues of staff shortages through recruiting younger teachers or Newly Qualified Teachers (NQTs), and through training teachers within the school on schemes such as the Graduate Teacher Programme (GTP).

In the survey it was asked whether schools were experiencing shortages and whether they employed overseas trained teachers. As the table below highlights, 55% of schools which are currently experiencing shortages also employ overseas trained teachers, compared to 45% of schools which have teacher shortages and do not employ overseas trained teachers. 30% of schools with no teacher shortages also employ overseas trained teachers.

In terms of subject shortages and employment of overseas trained teachers, our survey highlighted that major shortages were recorded in the areas of: mathematics, science, English, IT, design and technology, primary. Overseas trained teachers were employed to teach: mathematics, English, science, languages and primary. There does seem to be a correlation between subject shortages and the employment of overseas trained teachers to teach those subjects.

### *Shortages and poverty*

In the schools we visited we asked the head teachers to rate the poverty situation of their school against other urban schools. Only three of the eighteen schools stated they had average or less than average levels of poverty. Half of the schools reported that between 45% and 70% of the children had free school meals. Of the fifteen schools that defined themselves as much poorer or poorer than average less than one third experienced current staff shortages (27%). 20% of the 'much poorer' schools were affected by current staff shortages, and 40% of the poorer schools were affected.

The survey did not ask head teachers to rate their poverty levels but it did ask about the percentage of children who had free school meals. The results of a cross-tabulation of current staff shortages with free school meals as shown in the table below. Of the 362 responses, 258 of the schools, (71%) were not experiencing shortages compared to 29% of the schools that were experiencing staff shortages. The highest level of staff shortages occurs in schools with 41-50% of children having free school meals, followed by those with 21 -30%.

### *Migration of British teachers and shortages*

Of the three schools visited, one special needs primary and two secondary schools, all located in London, had experienced migration of British teachers. Five staff in total had left since 2000. Four of the migrants were female and one was male. Two taught PE, one taught humanities, one was a science teacher and the fifth was a primary school teacher. The teachers went to Russia (2002), Thailand (2003), Caribbean (2000), Australia (2004) and Swaziland (2004). In three cases, the head teacher said it had been difficult to find replacement staff. These teachers all worked at the same school in London. One had taught mathematics and two were physical education teachers.

Table 4.12: Poverty and Staff Shortages

Percentage of free school meals	Shortages	No Shortages	Total	Percentage of Schools with Shortages
0 - 10%	50	140	190	26%
11 - 20%	20	46	66	30%
21 - 30%	16	23	39	41%
31 - 40%	8	31	39	20%
41 - 50%	6	7	13	46%
51 - 60%	3	6	9	33%
61 - 70%	0	4	4	0%
71 - 80%	1	0	1	100%
81 - 90%	0	0	0	0%
91 - 100%	0	1	1	0%

In our survey, we asked schools how many of their British staff had migrated overseas since 2000. 24% (or 97) of all schools experienced migration of British staff overseas since 2000. As the table below highlights, two thirds of those teachers had migrated from secondary schools.

Table 4.13: Migration of British Teachers

Type of School	British Staff Migration		% Schools with Staff Migration
	Yes	No	
Primary	30	157	16%
Secondary	66	106	38%
Special Needs	1	6	14%
Total	97	269	

Of the 97 schools where British teachers had left to work overseas, 34 also had current staff shortages.

### *Views of British teachers about migration*

45% of the teachers who responded to the question about whether they were interested in working overseas gave a positive response. Of that 45% (54 teachers), 20 (35%) had actively looked for an opportunity. Secondary teachers were interested in working overseas compared with primary teachers: 49% as compared to 37%.

Comments from the British teachers who expressed an interest in working abroad reflect the push and pull factors within the British teaching context. One British teacher said that “Teaching in a different context, culture would be interesting and valuable.” Another teacher said they would like to go to “examine how curriculum differs in relation to society/culture/religion in another location”.

## 4.2 International recruitment

### *School visits*

Of the 18 schools visited, only one secondary school had never employed overseas-trained teachers. Four of the primary schools (three in Birmingham and one in London) do not currently employ overseas trained teachers. The nationalities of the teachers who had been employed were: Australian, Canadian, South African, New Zealanders, Polish, Zimbabwean, Jamaican, Kenyan, Somalian, American, French, Guyanese, Spanish, Mauritian, Chinese, Sri Lankan, Indian, Nigerian, Sierra Leonean, Algerian, Cameroonian and Irish.

### *Survey responses*

The survey asked schools to state whether they employed overseas-trained teachers and if they did, where they originated from and what subjects they taught? The majority of schools that currently employ overseas trained teachers are secondary schools, 52% compared to 14% of primary schools. No special needs schools that responded to the survey currently employ overseas-trained teachers.

Those who currently do not employ overseas teachers were asked whether they had ever employed them? One fifth of primary schools (21%) have employed overseas trained teachers in the past compared to 14% which currently employ them. There is an increase in the number of overseas trained teachers employed in secondary schools compared to past employment (40% in the past compared to 52% currently) while there has been a decrease in the percentage of overseas teachers working in special needs sector compared to the past (29%).

From the responses to the survey, 51% of schools either currently employ or have previously employed, overseas-trained teachers. However, 33% of primary schools have employed an overseas trained teacher compared to 73% of secondary schools. 29% of special needs schools have employed an overseas trained teacher. The survey responses highlight that overseas recruitment has declined in the primary and special needs sectors but has increased in secondary schools.

The table opposite shows how many schools mentioned specific nationalities of teachers employed currently.

**Table 4.14: Number of Schools Employing Overseas Trained Teachers by Nationality**

Country	Number of Schools that employ teachers
South Africa	41
Australia	39
New Zealand	29
Canada	24
USA	18
France	17
Jamaica	12
Germany	8
Zimbabwe	8
Nigeria	7
Ghana	7
Spain	5
India	4
Trinidad & Tobago	3
Sri Lanka	2
Mauritius	2
Poland	2
Algeria	2
Pakistan	2
Kenya	2
China	2
Hong Kong	2

The countries that were mentioned once by schools were: Philippines, Czech Republic, Morocco, Moldova, Iran, Belgium, Slovenia, Bangladesh, Senegal, Dominica, Romania, Portugal, Sweden, Rumania, Ireland, Japan, Israel, Turkey, Bosnia, French Reunion, Lebanon, Zambia and Austria.

The subjects taught by overseas-trained teachers according to the survey responses are listed below:

**Table 4.15: Subjects Taught by Overseas Trained Teachers**

Subject	Number of Schools
Mathematics	38
English	33
Science	33
Primary	26
Languages	21
Information Technology	13
Physical Education	10
Design and Technology	8
Home Economics	6
Humanities	6
Religious Education	6
Other	6
Art	4
Music	3

#### 4.2.1 Profile of the international teachers

This section examines the profile of the international teachers that responded to our questionnaire. In total, 183 responses were received. As explained in section 4.3, the data was collected through a variety of different channels. Of those responses, similar numbers from developed countries and developing countries were received. The data from these two groups is presented below separately.

**Table 4.16: Origin of Teachers from Developed Countries**

Country of Origin	Number of Respondents
Australia	38
New Zealand	17
Canada	16
Ireland	8
USA	3
Netherlands	2
Austria	1
Poland	1
Bosnia	1
Greece	1
Finland	1
Italy	1
Hong Kong	1
Britain	1
<b>Total</b>	<b>93</b>

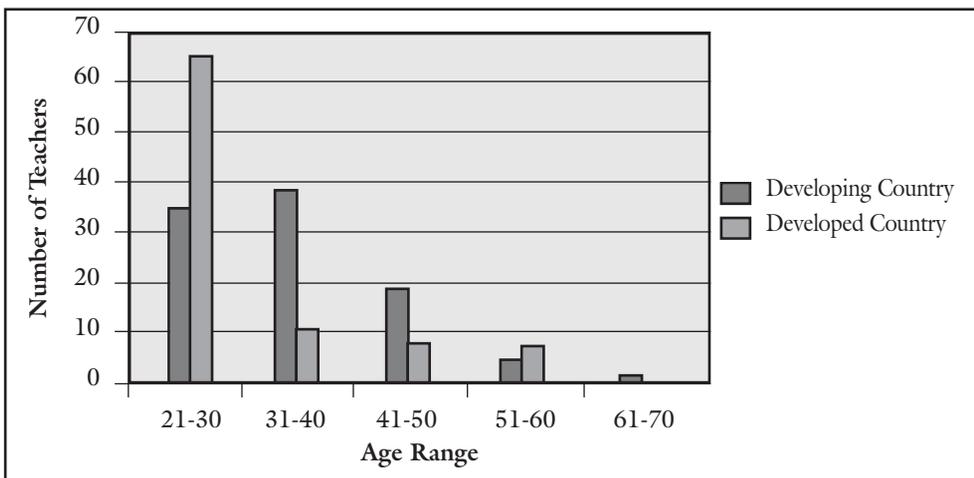
**Table 4.17: Origin of Teachers from Developing Countries**

Country	Number of Respondents
South Africa	47
Jamaica	16
Zimbabwe	8
India	5
Nigeria	4
Guyana	3
Kenya	3
Pakistan	3
Zambia	2
Ghana	2
Mauritius	1
Philippines	1
Trinidad & Tobago	1
Tanzania	1
Bangladesh	1
<b>Total</b>	<b>98</b>

The responses to the survey do reflect the numbers of Commonwealth teachers working in England. Table 4.4 shows that the highest number of work permits were given out to South Africans, Australians, New Zealanders, Jamaicans, Canadians and Zimbabweans.

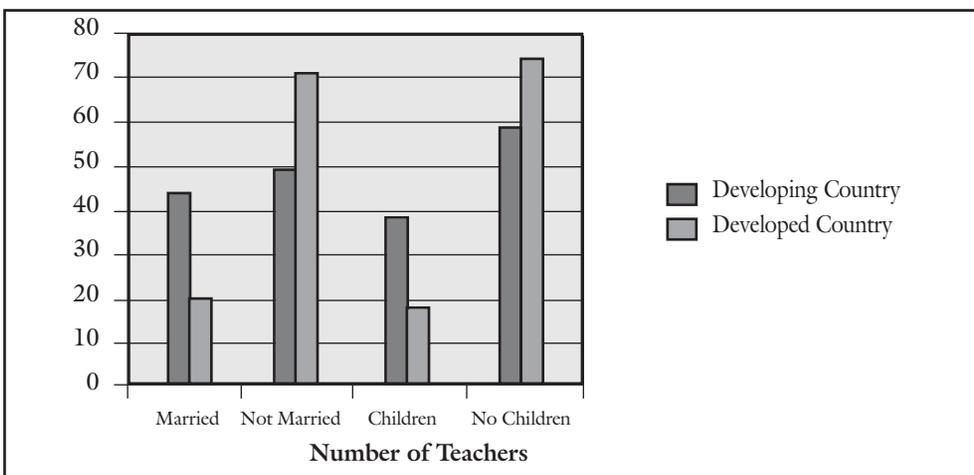
The percentage of female teachers is higher from the developed countries than from the developing countries: 75% as compared with 62%. There is also a difference in the ages of the overseas teachers dependent on whether they originate from developed or developing countries. While there is not a great deal of difference in the average age of the teachers, it is evident that teachers from the developed countries are younger (average age thirty-one) than their counterparts from the developing countries (average age thirty-five). 72% of teachers from developed countries are between the ages of twenty- to thirty compared with 35% of teachers from developing countries.

**Figure 4.1: Age of Overseas Trained Teachers**



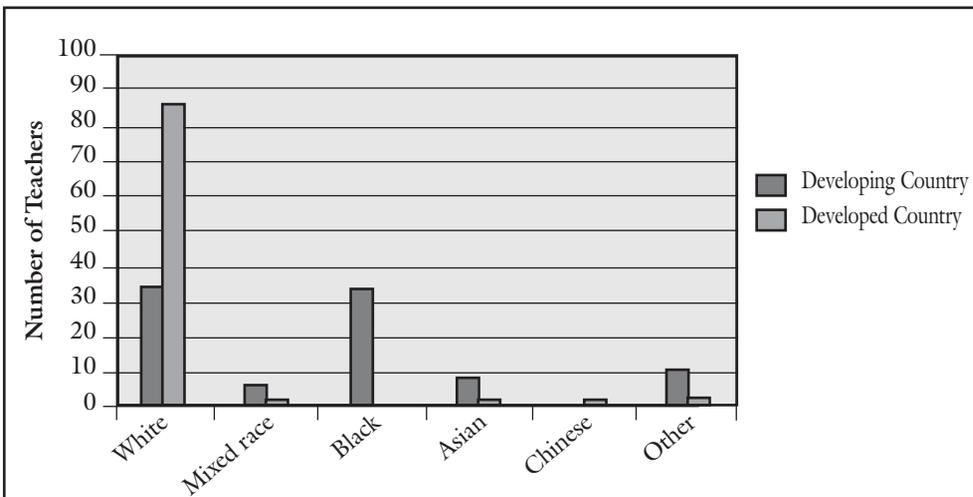
The older age of the teachers from developing countries also accords with the fact that more of them are married and have children than teachers from developed countries. The graph below illustrates this.

**Figure 4.2: Family Status of Teachers**



The vast majority of teachers from developed countries classify themselves as white. In contrast, teachers from developing countries come from a variety of ethnic population groups. The white teachers from developing countries are predominantly from South Africa.

Figure 4.3: Qualifications of Expatriate Teachers



There was no major difference between the teaching positions occupied by the teachers within the schools. The only slight difference between those teachers from developing and developed countries was that there were slightly more teachers from developed countries in head of department or deputy head positions: seven from developed countries and four from developing countries.

57% of the developed country teachers and 71% of the developing country teachers specialised in teaching a particular subject. Schools reported that their shortage subjects were science, mathematics, information technology, religious education, music, home science, design and technology. In the survey, the most reported shortages were in mathematics, science, English and information technology. The table opposite highlights that overseas trained teachers are covering the shortages particularly in the areas of mathematics, science, English and design and technology.

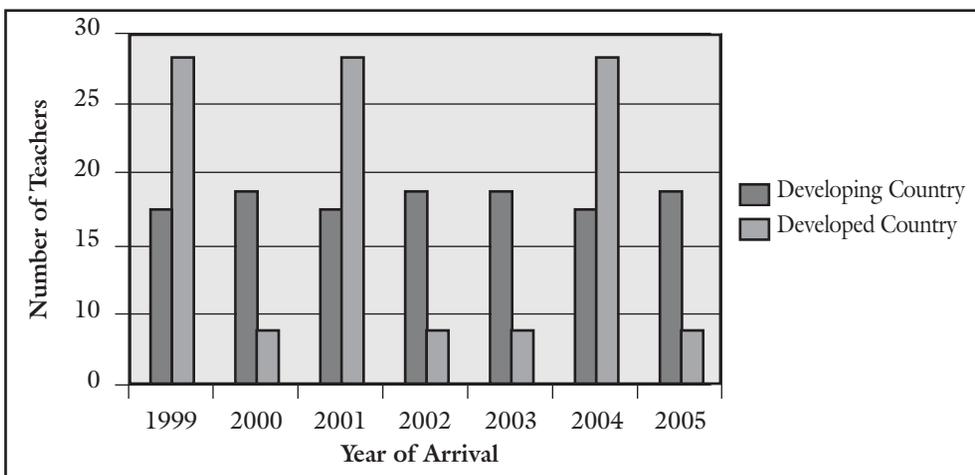
Table 4.18: Subjects Taught

Subject	Developing Country	Developed Country	Total
Mathematics	21	7	28
English	13		22
Science	13	10	23
Design and Technology	8	5	13
Humanities	4	3	7
Physical Education	4	4	8
Other Languages	2	1	3
Other	2	1	3
Information Technology	2	1	3
Religious Education	1	0	1
Special Needs	1	2	3
Music/Drama	0	2	2
Arts/Craft	0	2	2
Economics	0	3	3
Home Science	0	1	1
Social Studies	0	1	1
Total	71	52	123

Teachers from developing countries are more experienced than those from developed countries. The average length of teaching experience of developing country teachers was eleven years as compared to seven years of experience of teachers from developed countries.

Ten teachers from developing countries arrived prior to 1999, seven of those during the 1990s. Ten teachers from developed countries also arrived prior to 1999, six during the 1990s, three during the 1980s and one during the 1970s. However, as the graph below illustrates, the majority of respondents from developing countries arrived during 2001-2002 while more of our respondents from developed countries arrived in 2003 and 2004.

Figure 4.4: Year of Arrival



Commonwealth countries operate different school years. There have been complaints that teachers were being recruited during the school year. As the table below shows the majority of teachers arrived in August (the beginning of the English school year) or December/ January which is the end/beginning of the school year in the antipodean countries. There are relatively high numbers arriving in April which suggests that teachers are leaving their schools during the school year in significant numbers. There are also teachers coming to England during the course of the school year, although not in such large numbers.

**Table 4.19: Month Arrived**

Month Arrived	Developing Countries	Developed Countries	Total
January	11	10	21
February	4	9	13
March	6	6	12
April	10	10	20
May	3	2	5
June	4	4	8
July	5	4	9
August	22	14	36
September	8	9	17
October	2	4	6
November	6	3	9
December	12	15	27

As stated in the first section of the chapter, there are no known figures on the total number of overseas trained teachers working in England in government maintained schools. Interviews with the agencies highlighted that they recruit teachers through a variety of methods: some deal almost exclusively in working holiday visas whereas other agencies work with schools to obtain work permits. One recruiting agent in South Africa estimated that 80-85% of the teachers recruited by him came on a working holiday visa.

The two figures below highlight the different methods of entry of the teachers from developing and developed countries. It is evident that more options are available to teachers from developed countries, whereas two thirds of teachers from developing countries have come to work in England on work permits. The percentage of teachers on a working holiday visa is very small compared to the developed country teachers: 7% as compared to 24%<sup>135</sup>. It has been shown that teachers from developing countries are older on average than those from developed countries. The working holiday visa is only open to teachers under the age of thirty who can prove they have the financial resources for their flight and for two months living expenses in the UK. Teachers from developing countries may therefore be excluded from the working holiday visa through age and financial constraints.

<sup>135</sup> One recruitment agency argued that their experience had been that it was much harder for teachers from developing countries to access working holiday visas than it was for teachers from developed countries (interview).

Figure 4.5: Entry Requirements for Teachers from Developed Countries

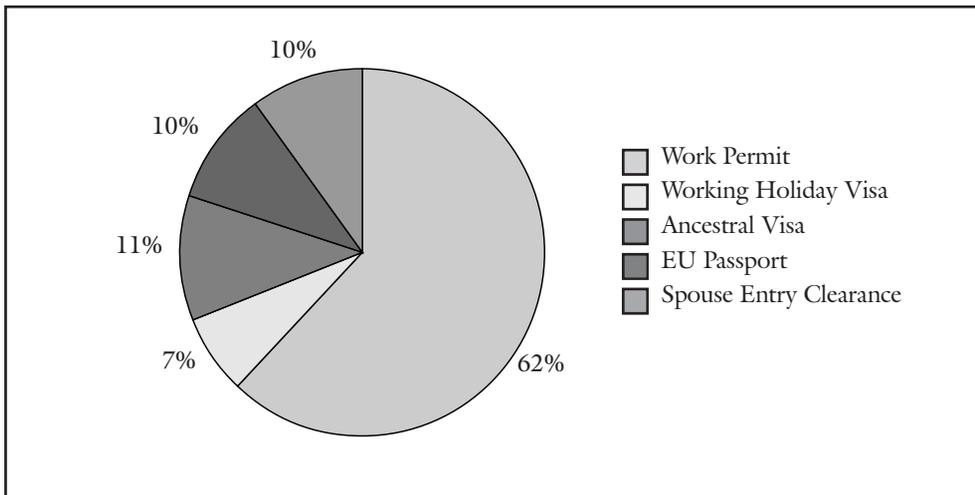
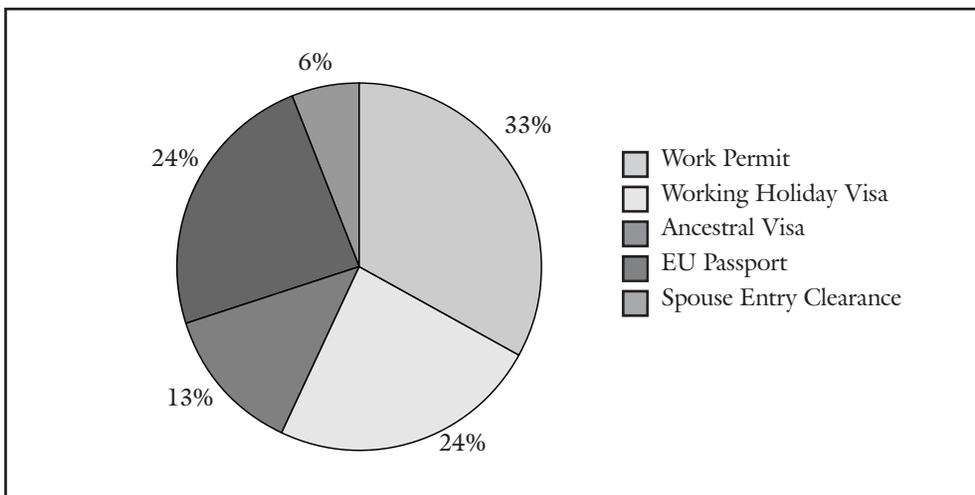


Figure 4.6: Entry Requirements for Teachers from Developed Countries



### *Status of employment: The issue of QTS*

As explained in section one of this chapter, teachers can be employed in England either as teachers with Qualified Teacher Status (QTS) or as Instructors (non-QTS). There are two separate pay scales although it is at the discretion of the school whether they pay a teacher without QTS on the QTS or Instructor scale. The overwhelming majority of teachers who responded to the questionnaire are being employed as non-QTS teachers: 75% as compared to 25%.

A large percentage of respondents who did not have QTS are planning to obtain it (88%). However, as many of our respondents are on contract and received our questionnaire through the designated recommending bodies, this high percentage is not representative as it does not include many supply teachers. Recruitment agencies stated that the vast majority of their supply

teachers do not bother getting QTS as they are not planning to stay in the country. Added to this, in order to obtain QTS, an overseas teacher needs the recommendation and support of a school. Clearly, given the nature of short-term supply work, obtaining QTS would not be possible for a supply teacher and would not be supported by a school.

Direct comments from teachers about QTS were not requested, but in the general section at the end of the questionnaire they were asked for any other comments about teaching in England. QTS was a key issue raised by many overseas trained teachers<sup>136</sup>. Comments attest to a sense of deep frustration and anger at the QTS process. A number of important concerns were raised. First, there was a strong feeling expressed that teachers' existing qualifications should be sufficient for them to teach in England. As one Australian teacher stated: "I am happy with most aspects except that my qualifications are not recognised and I have to complete QTS – after twenty-seven years." A South African wrote: "I do however feel it is unnecessary and to a certain extent, insulting, that we are not recognised as qualified. QTS is time-consuming and expensive and after working here for a few years, I don't see the point of a bridging course when we can already teach effectively". A New Zealander wrote: "Obtaining my QTS has been a very condescending experience for me...I feel quite upset that my degree and teaching diploma doesn't mean I am a qualified teacher in the UK."

Schools are able to employ non-QTS teachers on an instructor salary scale which is less than the QTS salary scale<sup>137</sup>. The financial implications of teaching as a non-QTS teacher were raised by a number of teachers. One Australian wrote "My time would be better spent improving the curriculum at school [than doing QTS]. Yet we are employed in droves. Cheap labour!" A South African teacher felt that the system was very unfair because s/he was "being paid an unqualified salary for doing all the work qualified teachers do". An Australian teacher could not understand the following: "why you can teach here (England) for four years without QTS full time and then after the four years you need to get QTS or go home".

Concerns were raised about the difficulty of accessing information about the QTS. One American teacher wrote: "I have been told so much conflicting information on obtaining QTS in this country". A Jamaican teacher who had been recruited by a school wrote: "When the head teacher came to the Caribbean she NEVER mentioned QTS. Neither did she mention it during our one week orientation in August. QTS leapt out at us." A South African teacher said "OTTs need to be better informed of the requirements to do conversion for QTS".

The issue of QTS also arose in interviews with head teachers. Two heads of special needs schools talked about the difficulty of ensuring their teachers gained QTS when a term of the programme was supposed to be spent teaching in a mainstream school. Another head teacher talked about the bizarre nature of a system that would give QTS automatically to a Spanish teacher who taught French but demanded that a Canadian, native French speaker who was teaching French, went through the QTS assessment<sup>138</sup>.

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<sup>136</sup> This result was very similar to that found in a National Union of Teachers survey conducted in 2004 (NUT, 2004:18).

<sup>137</sup> Some schools chose to pay their non-QTS staff on the QTS scale.

<sup>138</sup> This occurs because the UK government is signed up to European legislation.

*Reasons for coming to work in England*

The clear preferences demonstrated in the table below highlight the reasons why teachers from developed and developing countries have chosen to work in England.

**Table 4.20: Reasons for Coming to England**

Reason	Developing Country Preference			Developed Country Preference		
	1	2	3	1	2	3
Salary	13	9	11	5	8	8
Travel	8	14	10	41	12	8
Professional Development	17	9	10	4	22	11
Family and Friends Overseas	3	3	3	12	9	12
Unemployment	1	1	0	3	4	3
Better working conditions	2	4	1	0	0	1
Safer Environment	4	2	3	0	0	1
Better Social Services	0	1	3	0	1	0
Other	8	0	1	5	0	6

Teachers from developing countries are moving primarily for professional development followed by increased salary. As one Zimbabwean teacher stated: “I’ve upgraded (developed) my teaching skills, experiences and my own life in general”. A Pakistani teacher commented s/he would recommend working in England because of the “high salary, professional development and better working conditions”. A South African teacher said: “More scope for professional advancement and development in the UK than South Africa”. Travel is the third most important reason.

Teachers from developed countries are moving primarily for the opportunity to travel, followed by the existence of friends and family living in England. Salary is in a distant third place. As an Australian teacher wrote: “If they [other Australian teachers] want to travel it is convenient, the pay is good enough to travel and live on.” A New Zealand teacher stated, teaching in England is “good career development, ability to travel easily and save for future”<sup>139</sup>.

The table also shows that very few of the teachers from developing countries cited unemployment as a reason for coming to England compared to teachers from developed countries. Six of the eight teachers who gave unemployment a priority were Canadian teachers, one was Australian and another was Irish.

### 4.3 The recruitment process

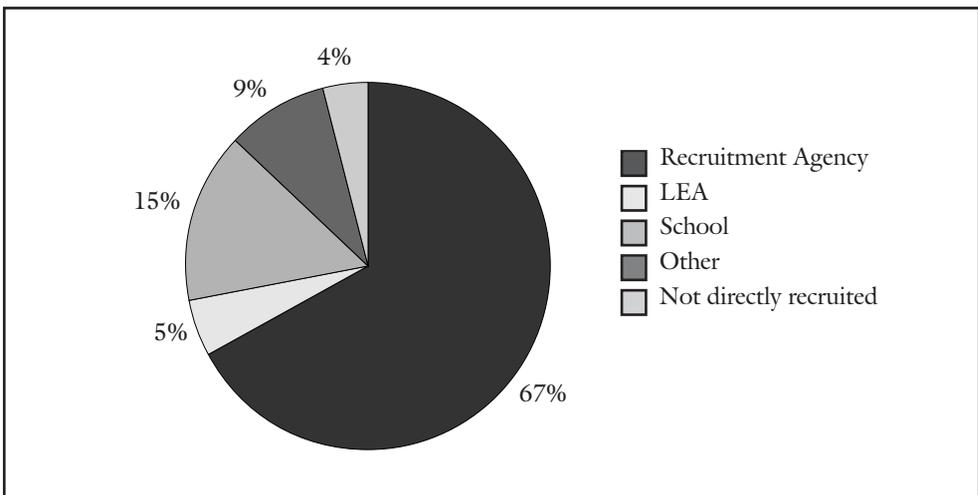
This section examines how the recruitment process operates. The questions asked are why have overseas-trained teachers wanted to come and work in England, who recruited them and has the recruitment experience been a positive one?

<sup>139</sup> These findings are very similar to those found by the NUT survey (2004).

*The recruitment route*

Unlike Botswana, recruitment in England is undertaken at the school level. Head teachers and school governing boards are responsible for teacher recruitment. There are therefore a variety of methods through which overseas-trained teachers have been recruited to work in England: private recruitment companies, Local Education Authorities (LEA), through partnerships between LEAs and recruitment companies and by individual schools<sup>140</sup>. The majority of the teachers who responded to the survey, 67%, were recruited by private recruitment agencies. The data may also overestimate the numbers of teachers recruited through the schools because of the poor response to attempts to contact supply teachers. However, it is interesting to note that school recruitment accounted for 15% of the international recruitment among respondents. There was no significant difference between the ways in which teachers from developing and developed countries had been recruited.

**Figure 4.7: The Recruitment Route**



*Views of teachers of the recruitment process*

Teachers were asked if they had received information about a variety of different issues before they arrived in England? The table opposite gives the responses of all respondents that have arrived in England and that were directly recruited since 2000. Recruitment agencies recruited 108 teachers, five teachers were recruited by the LEAs, twenty-two by schools, seven by other means and five were not directly recruited.

<sup>140</sup> One primary head we visited explained that in their recent recruitment drive, three of the applicants were from abroad. They had seen the advertisement on the *Times Education Supplement* (TES) website and emailed the head with their CV. One of the teachers had their own webpage. The head explained that she had not considered the applications because the teachers were outside of the country and she had local candidates.

Table 4.21: Information Given to Teachers Prior to Arrival

Information	Recruitment Agency		LEA		School		Other	
	Yes	No	Yes	No	Yes	No	Yes	No
School	50	60	3	2	14	6	1	4
Accommodation	50	58	1	4	8	9	1	4
Cost of Living	57	51	3	2	1	16	2	4
Salary	76	34	3	2	13	6	2	3
Teaching Conditions	51	55	1	4	5	12	3	3

The major recruiters of teachers are the private recruitment agencies. From the responses to the survey it is clear that agencies are giving information in a number of areas. Teachers were informed about their salary levels prior to arrival but there are areas where agencies could be providing more information to teachers they are recruiting. The information given out by individual schools is mixed. Clearly, the head teachers are giving information about the particular schools but there appeared to have been a distinct lack of information given about teaching conditions and the cost of living. This is of particular concern given that individual school recruitment is not monitored by any external or government agency.

In total, 122 teachers rated the information they had received during their recruitment. 73% of those recruited by private recruitment agencies said the information received was fair to very good, leaving 27% who were dissatisfied. Teachers were not asked to comment specifically on the recruitment process, and very few did. A South African teacher said “The agencies were dishonest....Not very sympathetic when teacher and school were not compatible.” An Australian teacher recruited by an agency said: “If people intend to recruit overseas staff, they must be clear about obtaining QTS, cost of living, expectations from schools and LEA and salary”. There was a less direct sense in which overseas teachers did not feel they had been adequately informed prior to making the decision to come to England. A Zimbabwean teacher stated: “I support recruitment but teachers should be appraised very well before they come to England.” An Indian teacher wrote: “I think it’s a good idea to recruit teachers but they should be informed about the system here before they arrive. Many a times we are not aware”. A New Zealand teacher, who was not actually directly recruited, was very critical: “Many teachers are ‘tricked’ into coming to UK under the impression they will be able to teach easily and earn a lot of money. When they arrive, they realise they are not considered equal to UK teachers or even EU trained teachers and their remuneration is reflective of that”. However, it is important to stress that few teachers commented on the recruitment process at all which implies it was not a negative experience, at least, not one worth commenting on.

### *Head teachers’ views of the recruitment process*

In the schools visited the head teachers were asked about their experience of the recruitment process. All of the schools visited, apart from one, had recruited overseas- trained teachers at some point, although not all schools currently employ overseas- trained teachers. Ten of the schools had used recruitment agencies, nine of the schools had used ‘other’ methods and one had recruited through the LEA.

The general issue of the recruitment of staff (British and overseas) was discussed with the head teachers of the schools visited. Of those who used recruitment agencies, none of the head teachers was aware of the Quality Mark scheme. They explained that they had established relationships with agencies that they trusted to supply good teachers as and when they were required. One head of a primary school said she liked to work with the same agency because she wanted to try and develop a pool of supply teachers who were familiar with the school, thus minimising the disruption for the children. She had experience of working with another agency that had dealt mainly with overseas teachers but she had been disappointed with the teachers and the quality of service of the agency. Another head teacher said there were several agencies she refused to work with because they used aggressive tactics and other agencies that had sent supply teachers who could barely speak English. She explained that she now works with two agencies who understand the school but her longer term plan is to ask teachers who retire from the school to work as supply teachers.

Informal recruitment of teachers by the head seemed to have been a way in which head teachers coped with staffing difficulties. One head of a primary school in London explained that she had been unable to locate a suitable candidate as a reception teacher. However, she was approached by a Jamaican teacher who had heard about the job through her local church. Another primary school head said she had appointed an overseas trained teacher who was covering a maternity leave in another local school. She had heard about her through a colleague. Two heads of schools in particularly challenging circumstances had brought staff with them from their previous schools. A head from a special needs school explained that he has developed his own group of supply teachers as it has become very expensive to recruit a special needs supply teacher. In his view, this was cheaper for the school and better for the teacher.

Two primary head teachers had interviewed overseas teachers over the telephone – one teacher had come from New Zealand and the other from Australia. Both were young teachers. The teacher from New Zealand was a valuable contribution to the school, according to the head, and she was sorry to see her leave. The young man from Australia was not rated as highly. The head explained that she had been desperate and had interviewed the young man. He had been a poor teacher and had particular difficulties teaching history and geography. This experience had been off-putting and she was not keen to recruit any more overseas teachers.

A secondary school head teacher in Birmingham said two of his overseas trained teachers had come to the school via an agency. He advertised the post and the agency had sent the CVs. The overseas teachers had been taken on after a period of probation. This particular head worked with fifteen different agencies and while he begrudged paying the fee said he would be lost without them as so many of his staff are on training courses and he needs a regular supply of good teachers. A secondary head teacher in London explained that the majority of the teachers on the books of supply agencies are overseas trained. This head had experienced problems with agencies that sent 'qualified' teachers who are not in fact qualified to teach. However, she also had developed good working relationships with a number of agencies.

Two schools undertook their own recruitment exercises. One large secondary school in London had used a variety of different recruitment methods and said that the overseas visit was a last resort option. They had undertaken recruitment drives in Barbados, Spain, Guyana and

Australia. Teachers from the school had gone on the visits and had interviewed the potential candidates. The school also had recruited overseas teachers via its website. A head teacher in Birmingham explained that he had personal contacts in schools in the Caribbean so he recruited through this avenue. He would interview prospective candidates over the telephone but as he had confidence in the head teachers in the schools, this lack of face to face contact had not proved to be a problem.

The school visits made highlighted the variety of attitudes among head teachers towards the use of recruitment agencies as well as the array of recruitment processes available to the heads. Interestingly, none of the head teachers used LEA supply pools to deal with their staffing needs, preferring to use agencies they had developed relationships with, using their own local contacts or creating their own recruitment drives.

### *Orientation*

In Botswana it was seen that the government organised a week-long orientation for the teachers when they arrived in the country prior to beginning work in the schools. How many of the overseas-trained teachers working in England had been given some form of orientation before they started work in school? The responses are from those teachers who have arrived since 2000. Over half of the respondents (60%) had not received an orientation before starting work in a school in England. All of the recruitment agencies that were visited as part of this research do run an orientation for the teachers they recruit. The content varies according to each agency and it is also not compulsory for teachers to attend the orientation seminars. The two schools that run their own overseas recruitment have induction programmes for the overseas teachers within the school<sup>141</sup>.

Of those that had attended an orientation, the majority rated it positively as the table below highlights.

**Table 4.22: How the Orientation Process was Rated**

Provided by	Very Good	Good	Fair	Bad
Recruitment Agency	7	14	17	9
LEA	1	0	0	0
School	4	3	4	2
Other	2	3	0	1

## **4.4 The costs and benefits of recruiting overseas trained teachers**

### **4.4.1 Financial costs to schools**

The only direct cost to the Department for Education and Skills is the cost of a work permit for an overseas-trained teacher. This currently costs £152.00 per teacher. As recruitment is done at the school level, it is the financial costs to the schools of overseas recruitment that are focused on. The majority of the teachers who responded to the questionnaires were recruited by the

<sup>141</sup> Research by Maylor and Hutchings reveals the different practices of induction that individual overseas trained teachers had experienced (Maylor & Hutchings, 2002: 45-49)

recruitment agencies. The agencies bear the direct costs of overseas recruitment but clearly these costs are passed on to the schools whether through the daily supply rate (which does not differ whether the teacher is overseas trained or British trained) or through the fee schools pay if a supply teacher becomes a permanent member of staff. Agencies that recruit teachers for specific positions within schools deal with applications for the work permits and charge fees to the schools for this service.

The schools that undertake their own overseas recruitment pay for this out of their own school budgets. Local Education Authorities that undertake their own recruitment charge the school a fee and the pan-London initiative undertaken by the Government of London office received contributions of £10,000 from each LEA to undertake the recruitment of teachers from Australia and New Zealand.

### *Training costs and length of service of OTT*

Costs of training the overseas-trained teachers are also a factor in looking at the costs to the recruiting country. Teachers were asked whether they had undertaken any professional development while working in England. 93% of the teachers from developing countries said they had undertaken professional development and in 80% of those cases, the school had paid for it. 85% of teachers from developed countries had undertaken professional development and in 84% of cases the school had paid for it. In total, 90% of the teachers had undertaken some professional development and in the overwhelming majority of cases (83%), this had been paid for by the school or the LEA.

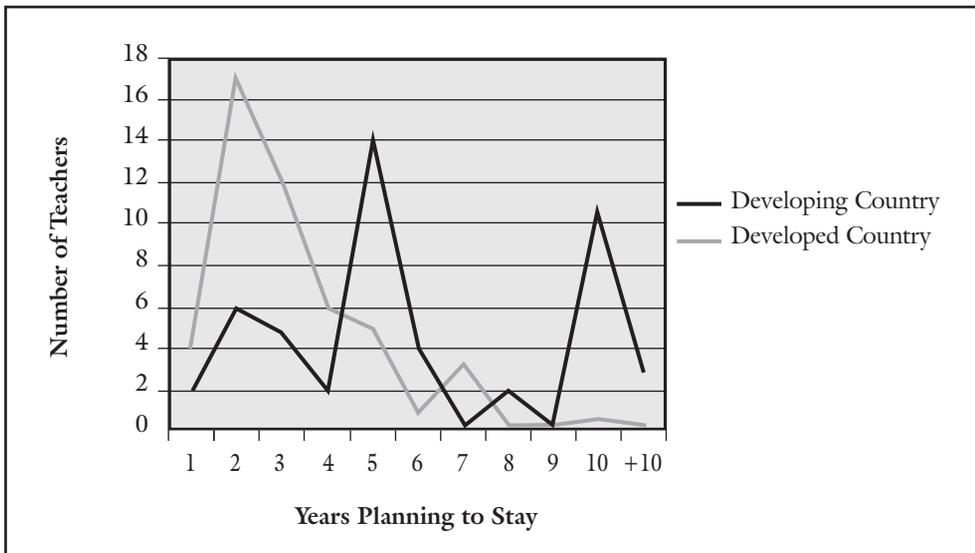
The respondents were primarily working in schools on contract rather than working as daily supply teachers. Only eleven teachers from developed countries and nine teachers from developing countries were working as supply teachers. 68% of the teachers said they were offered enough work, leaving 32% who would have liked more. Given the small size of this sample it is difficult to generalise as to how widespread the desire for more work is among supply teachers.

Among those teachers on contract with a school, slightly more than one third, 36%, are on one to two year contracts, and slightly less than a third, 26%, are on three to four year contracts. There is very little difference between the developed and developing country teachers in terms of contract length. However, as the table highlights, one fifth of teachers, 22%, are on a contract that is less than one year.

Teachers were asked about their short-term plans, i.e. did they plan to return home at the end of their current contract (obviously for some this would be at the end of this school year and for others in up to four years time) Seventeen teachers (9%), whether from developed or developing countries plan to return home at the end of the current contract. Of those, seven have contracts of less than a year and seven have contracts between one and two years, one has a contract of three to four years and two have ongoing contracts. An overwhelming 91% do not want to return home at the end of their contract (164 of the 180 teachers that responded) and one is not sure.

Of those who wanted to remain in England after their current contract, 69% wanted to continue teaching in the same school, 17% want to move to another school and 5% want to supply teaching. A very small percentage of the teachers said they wanted to find work outside of teaching, stop working and one wanted to move to another country<sup>142</sup>.

**Figure 4.8: Number of Years Overseas Trained Teachers Plan to Spend in England**



This graph illustrates the difference between the length of time teachers from developed countries and developing countries are planning to stay in England. The average length of time that developing country teachers plan to stay is 6.3 years, whereas teachers from developed countries plan to stay for 3.4 years.

#### 4.4.2 Benefits of recruitment

##### *The benefit to the education system*

The key point raised by many head teachers visited, particularly at the secondary level, was that without overseas-trained teachers, the school system would not have survived. One head teacher of a secondary school said that if overseas teachers had not filled the vacancies in the school, he would have not been able to fill the posts.

##### *Contributions at the school level*

During the school visits and in the survey, we asked head teachers to comment on the effectiveness of the overseas trained teachers when compared to British teachers. The data highlights that 33% of schools visited and 46% of schools that responded to our survey stated that the overseas trained teachers were as effective as local teachers. Twenty percent of schools visited and ten percent of schools surveyed thought overseas teachers were more

<sup>142</sup> A South African teacher who has been teaching in England for four years and is going to seek employment as a teacher in the United States.

effective. However, 47% of the schools visited and 45% of the schools that were surveyed stated that overseas trained teachers were not as effective. 65% of the head teachers noted that overseas-trained teachers had difficulty teaching the national curriculum. One head said the agencies should have to give teachers a three month crash course in the detail of the curriculum. Cultural differences in teaching styles were also noted by 65% of teachers. One secondary school head in Birmingham noted that overseas teachers from certain countries are used to children who sit quietly in the classroom. Related to this, several head teachers stated that some overseas teachers did not have the necessary skills to deal with behavioural difficulties and this had caused some problems in the classroom. Communication issues, normally strong accents, were raised by 35% of the head teachers that were visited.

However, head teachers in nearly all of the schools (88%) that were visited were very positive about the contributions that overseas-trained teachers had made to the school<sup>143</sup>. One primary head teacher from Birmingham recalled a New Zealand teacher who had worked at the school and who had worked extremely hard. She had been very creative in her approach, for example, she had made an igloo in the corner of her classroom. A primary head teacher from London praised her South African overseas teachers and recalled how one teacher had introduced the children to South African life through stories about the wildlife and through bringing South African items into the classroom. A secondary school head teacher in London said overseas teachers had contributed through giving concerts, having additional languages and that their presence generally enriched the school. In a primary school, the head noted that several of the overseas teachers had undertaken mini projects about their countries. Several head teachers commented on the ethnic diversity of their overseas teachers which not only enriched the school culture but also ensured the staff reflected the diversity of the student population. Another primary head in London said overseas teachers were particularly important in providing role models for the boys.

Head teachers were also asked whether they had received comments from parents about the overseas teachers. The response from schools was quite mixed. Some schools noted that parents were happy with the overseas teachers because they brought some stability to the staffing (suggesting that more supply teachers would have been employed if it were not for the overseas teachers). Two head teachers said that parents have only commented on an individual basis rather than discussing overseas teachers as a group. Another observed that parents had always said positive things about the overseas teachers. One head said that comments had been slightly more negative because of communication problems.

**Table 4.23: Comments by Parents about Overseas Trained Teachers**

Comment	Schools Visits %	Survey %
Overall good	18	20
Overall bad	12	4
Mixed	35	35
None	35	42

<sup>143</sup> This view was supported by a study undertaken by Maylor and Hutchings (2002): "Overseas-trained teachers are seen as having the greatest induction needs, but many also bring considerable strength and experience to the school" (Maylor & Hutchings, 2004: 40).

### *Individual teacher benefits*

The data illustrates the tremendous pull of the salary differential for teachers coming from developing countries to work in England. Salary levels on average are three times higher for teachers working in England: teachers reported an average monthly salary of £466.72 at home compared to £1252.93 per month average starting salary in England. The differential is much less for teachers coming from developed countries: £946.73 per month at home compared to £1384.17 per month average starting salary in England. In fact, some teachers from developed countries commented that the salary was lower in England than at home. There is no doubt that teachers from developing countries benefit financially from the migration.

In order to ascertain whether the experience of working in England had been a positive or negative one, teachers were asked whether they would recommend working in England to colleagues back home. The response was overwhelmingly positive. 71% of teachers said they would recommend it, 23% would not and 5.5% said would and would not recommend teaching in England. There was very little difference in response of teachers from developing and developed countries. Slightly more teachers from developed countries (74%) recommended teaching in England compared with 70% of teachers from developing countries. The positive reasons given were: professional and personal development, opportunity to travel, financial benefits. Those who would not recommend it cited racism<sup>144</sup>, QTS, stress, behavioural difficulties, and lack of respect. As one South African teacher commented: “It was like teaching in heaven back home and suddenly being in hell in the UK”.

### *Implications for other developing countries*

Respondents were asked whether they were employed or unemployed prior to coming to England. The vast majority of teachers from developing countries were employed as teachers before they came to England. 87% of teachers were employed compared to 13% who were not. Of those that were employed, 95% were employed on permanent contracts compared to 5% on temporary contracts. This is important as it highlights that the teachers who left their country of origin were active contributors to the education system, rather than unemployed in their country of origin.

The implications for the sending countries will vary depending on how long the teachers plan to work abroad and depending on what they intend to do on their return.

An important question was how many teachers planned to stay in England permanently? Thirty of our respondents, or 17%, did not answer this question. Of those who did, there was a difference in responses between the teachers from the developing countries and the developed countries. Only 17% of the developed country teachers plan to remain in England whereas 34% of teachers from developing countries plan to remain.

<sup>144</sup> A report commissioned by the Teacher Training Agency highlighted incidents of racism experienced by overseas trained teachers working in the South-East of England (Stuart et al, 2003).

**Table 4.24: Long-term Plans**

	Remain in England Permanently				
	Yes	No	Not Sure	No Response	Total
Developed Country	15	58	3	17	93
Developing Country	32	51	2	13	98
Total	46	109	5	20	191

*Adding value when they return?*

Of those who are planning to return home after working in England, there were significant differences in what teachers from developed and developing countries are planning to do. 84% of developed country teachers are planning to be employed in an education related field, whether as a teacher (73%) or in another capacity (11%). This differs when compared with teachers from developing countries. While 70% of teachers plan to be involved in an education related profession, only 33% want to be teachers.

Earlier in the chapter it was shown that nearly all teachers (90%) had undergone some form of formal professional development. It is assumed that armed with this professional development plus the experience gained through teaching in another culture, that teachers who return to the education field in their own countries will be adding value. The table below highlights how many of those returning have undergone professional development and what they plan to do on their return.

**Table 4.25: Professional Development Plans**

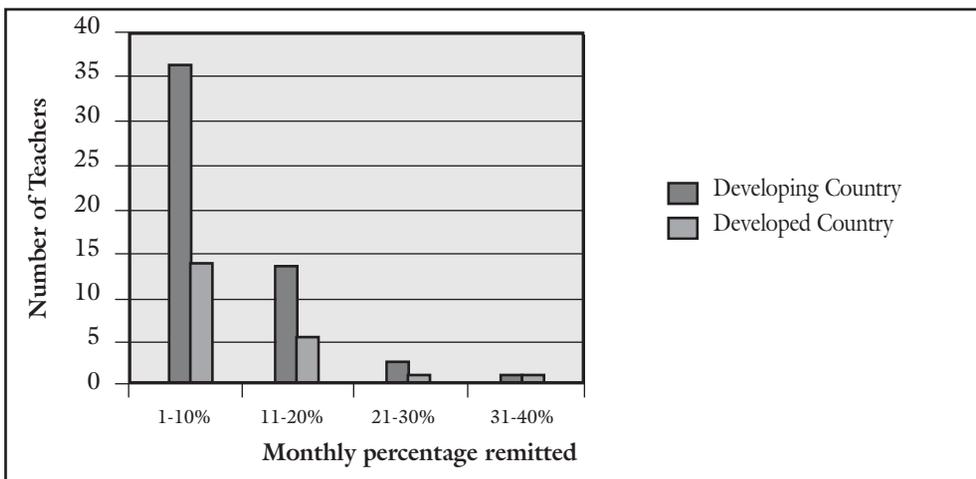
	Have You Undergone Professional Development?			
	Developing Country		Developed Country	
	Yes	No	Yes	No
Work as a teacher	12	3	40	9
Work in an education-related field	18	2	8	0
Work as an employee outside education	4	0	2	0
Self-employed	8	0	4	1
Not work	2	0	3	0
Not sure	2	0	1	0

However, professional development is of little added value if it is not relevant to teaching back in the home country. Generally, teachers had a positive assessment of their professional development. Only eight of the forty teachers from developed countries who intend to re-enter teaching said the professional development was not relevant or not at all relevant to their practice at home. None of the thirteen teachers from developing countries who plan to teach said the professional development was not at all relevant or not relevant.

*Financial benefits to country of origin*

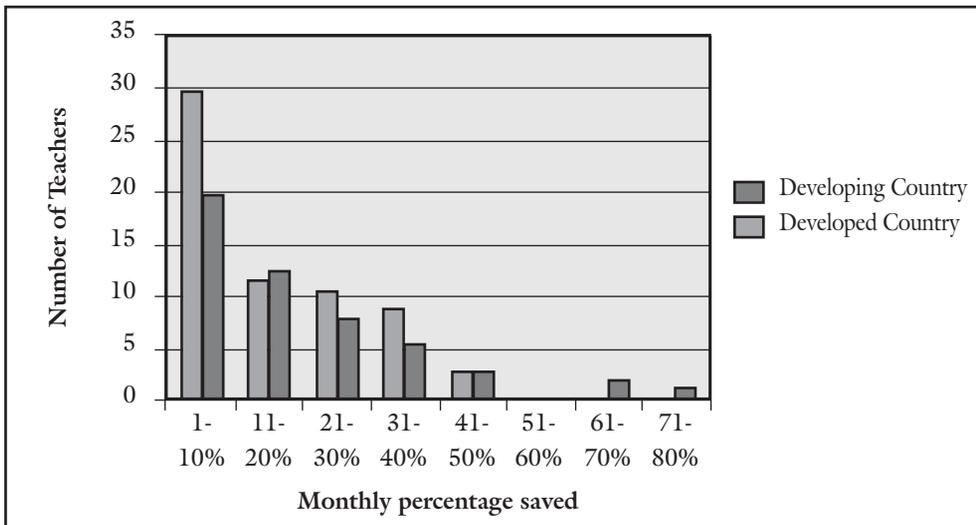
In order to determine the financial benefits accruing to countries that experience teacher recruitment, teachers were asked what percentage of their salary was remitted or saved? In the graph below, we can see that teachers from developing countries were more likely to remit a proportion of their salary than teachers from developed countries. 32% of teachers from developing countries do not remit any of their salary and 69% of teachers from developed countries do not remit. The mean percentage remitted by teachers from developing countries is: 8% and from developed country teachers: 5%.

**Figure 4.9: Percentage of Monthly Salary Remitted**



33% of teachers from developed countries and 23% of teachers from developing countries do not save any of their salary. The average that teachers from developed countries save is 15% compared with teachers from developing countries who save 14%.

**Figure 4.10: Percentage of Monthly Salary Saved**



## Conclusions

The current shortage of teachers in England is at the secondary school level and as a consequence, the employment of overseas-trained teachers is higher at the secondary level. However, the research has shown a decrease in the number of overseas-trained teachers working at the primary level since 2000. The national survey does not show a strong link between the socio-economic or poverty category of schools and staff shortages.

Overseas-trained teachers from Commonwealth countries are more predominant than from Europe or North America. The profile of teachers from developing and developed countries differs quite significantly. Teachers from developing countries are more likely to be male (although there is a higher percentage of females than males), between the ages of thirty-one and forty, to be married and more likely to have children and have six to ten years teaching experience. Teachers from developed countries are more likely to be female, between twenty-one and thirty, not married, without children and have up to five years teaching experience. The issue of Qualified Teacher Status causes a great deal of stress and frustration for overseas trained teachers. The majority of our respondents, 75%, were employed as Instructors.

Teachers from developing countries are migrating for reasons of professional development and salary (which is, on average, three times higher than at home). On the other hand teachers from developed countries are moving for reasons of travel, general life experience, not unlike the student 'gap year', and because family and friends are living in England. As for period of stay, teachers from developed countries plan to stay in England an average period of six to seven years, whereas teachers from developing countries plan to teach in England for three to four years. 38% of teachers from developing countries plan to permanently remain in England compared to 20% of teachers from developed countries. The percentage of teachers from developing countries who want to return home to work as teachers is low, although a higher percentage want to work in an education-related field, though this was not specified precisely. Teachers from developing countries remit an average of 8% of their salary and save an average of 14.28%. This is a significant proportion of income, given the higher cost of living in England.

Finally, it is worth noting that 25% of schools have experienced a migration of British teachers since 2000. Two thirds of British teachers who have migrated had worked at the secondary level. One third of schools that had experienced British teachers migrating currently have staff shortages. 45% of British teachers who responded to the questionnaire were interested in migration. The figure differed between primary school teachers (37%) and secondary schools teachers (49%). This interest could be a further justification for the development of teacher exchange schemes and common programmes of professional development.

## Chapter 5: Conclusions and Policy Implications

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In this concluding chapter, the findings are not summarised, as that is done at the end of each country study chapter. Instead, the implications for policy and for further research are discussed. However, it is useful to reflect on what has been learned about the nature of international mobility of teachers, as how the phenomenon is perceived in either positive or negative terms will influence any analysis in normative terms. Consequently, Section 1 begins by highlighting some salient and sometimes surprising features of the movements that have been observed. Section 2 turns to normative issues, asking whether international mobility of teachers should be regarded as something that, on balance, is harmful or as something that is beneficial? The popular presumption – influenced by the negative associations of the term “brain drain” – is that the phenomenon is harmful. However, it is useful to consider that presumption explicitly, as it colours discussion of appropriate policy responses. In this chapter, some positive features of the international recruitment of teachers are identified, as well as some negative aspects. The authors incline to the view that the positives outweigh the negatives. Appropriate policy responses might best be seen in terms of interventions that will minimise the negative aspects and capitalise on the positive effects. These are considered in Section 3. Inevitably, our discussion of such policy issues is limited by the constraints on the research that it was possible to carry out. Section 4 considers what further research might add to our understanding of the complex and diverse phenomena of teacher recruitment and mobility within the Commonwealth and provide further guidance for policy.

### 1. The nature of international teacher mobility

When considering policy responses to international teacher mobility, one important question is how large the movements are? If they are comparatively small, then whether their effects are on balance good or bad, they are unlikely to be a priority for policy-makers. Lack of information often prevented the researchers from obtaining a statistically reliable estimate of the scale of the movements. Administrative data on international teacher mobility was most comprehensive in the case of Botswana, where it implies that around 15% of teachers in government secondary schools are foreign. Moreover, the private school sector in Botswana seems almost exclusively run by expatriates. In the case of the UK, there is good data on the number of Commonwealth immigrants in the country on work permits that mention teaching. Such overseas teachers provide a proportionately much smaller input than in Botswana – accounting for around 1% of all teachers employed in the UK<sup>145</sup>. Since the UK work permit data can be disaggregated by country of origin, it is also informative about the international recruitment of teachers from Jamaica and South Africa. However, the UK data is not comprehensive since many overseas-trained teachers working in the UK do not require work permits. Moreover, large numbers of Jamaican teachers go to teach in countries other than the UK, as do some South Africans. It is however possible to make some tentative estimates, based on information about work permits and destinations provided from the various surveys of teachers that were conducted. In the case of Jamaica, such “back of an envelope” calculations imply that teachers working abroad may

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<sup>145</sup> Dividing the approximately 5000 foreign teachers with work permits in the UK derives the 1% figure by the 425,000 teachers in total in the country. Additional information on the number of foreign teachers in England is available through DfES form 618g. However, it is impossible to use this information as it does not disaggregate foreign teachers from others who are non-QTS.

account for around 7% of all Jamaicans currently working as teachers<sup>146</sup>. For South Africa, the estimate varies depending on which teacher survey is used but we hazard that between half a percent and four percent of South African teachers are working abroad<sup>147</sup>. These estimates imply that international teacher mobility is a widespread and quantitatively important phenomenon in the case of Botswana and Jamaica. For the larger countries of South Africa and the UK, the flows are proportionately smaller but nonetheless are non-negligible.

Regardless of the actual extent of international mobility, one surprising finding of the fieldwork was the high level of interest in international recruitment by even non-migrant teachers in each country. Around half of all non-migrant teachers contacted in the fieldwork expressed interest in teaching abroad: 45% of English teachers, 48% of South Africans; 55% of Jamaicans and 62% of Batswana. Among trainee teachers, 27% of South Africans wanted to teach abroad upon qualifying and 33% of Jamaicans. These findings suggest that teachers value the option of teaching abroad, even if most expressing an interest may never actually migrate. It is also interesting that there is no clear distinction between the responses of teachers in countries that are net senders of migrants compared with those that are net recipients. This suggests that international mobility of teachers has the potential to be a two-way process as opposed to a one-way 'brain drain'. In part, this may be because international migration of teachers appears not to be exclusively motivated by income differentials. Professional development was highly rated as a reason for motivation by migrant teachers, while the opportunity for travel was also rated as important – particularly for teachers from developed countries or for white South Africans.

Another unexpected insight from the research was the extent to which international recruitment of teachers may be a short-term phenomenon that arises during a process of adjustment within a national market for teachers. The notion of a 'brain drain' implies a permanent flow of migration, analogous to water flowing down a river. This characterisation may have an element of truth in the case of Jamaica, an economy that appears to a striking degree to be based around the migration of skilled labour<sup>148</sup>. However, looking at the recent experiences of international recruitment which were studied, it seems more common that the flows should be regarded as transitional adjustments. For example, international recruitment of foreign-trained teachers by the UK arose during a period of shortage of local teachers in 2000-2001. At the same time, recruitment agencies targeted Jamaica and South Africa partly because there was officially perceived to be a surplus of teachers in both countries and so they were fertile grounds for recruitment. Over a longer period, but still arguably a transitional phenomenon, the state school system in Botswana required the assistance of expatriate teachers during its rapid educational expansion. The circumstances that fostered international mobility of teachers have been transitory as supplies of locally trained teachers have adjusted to conditions of surplus or excess

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<sup>146</sup> This estimate is based on the 523 Jamaicans working as teachers on work permits in the UK. The data on teachers from developing countries working in the UK implies two thirds enter on the basis of work permits. Data from school visits implied 42% of Jamaican teachers working abroad are in the UK. Neither data set is statistically representative, so any estimates made on the basis must be used with care. However, in the absence of any other information, we use these proportions to estimate the total number of Jamaican teachers working overseas (1660) and compare this with the 22400 teachers working in Jamaica.

<sup>147</sup> It is known that 1492 South Africans worked in 1993 as teachers in the UK with work permits, while the total number teaching in South Africa was 354,201 in 1991. The higher bound estimate of 4% working abroad is based on the responses of the trainee teachers who have secured posts abroad – 83% going to the UK, but only 11% on the basis of work permits. The lower bound estimate of half a percent working abroad is based on the returned teacher survey data – 70% of whom had work permits and 96% of whom worked in the UK.

<sup>148</sup> Carrington and Detragaiche (1998) estimated that 67% of all Jamaicans with tertiary education had emigrated by 1990. This is one of the highest rates of emigration they estimate for any country in the world and makes the estimates given here for teacher migration from Jamaica appear modest.

demand. At the time of writing, the UK appears to have reduced its need for overseas teachers compared with 2000-2001. Officials in South African and Jamaica have stopped talking of teacher surpluses and begun to worry about teacher shortages. Even Botswana appears to be ending its fairly long-term reliance on expatriate teachers, having replaced many of them with locally trained ones. As such, rather than perceiving of international teacher mobility as part of some persistent “brain drain”, it may be better to conceive of it as something that is often transitional. It may also be useful in giving national educational systems more flexibility in making adjustments to imbalances in the local supply and demand for teachers.

On a related point, the term ‘brain drain’ implicitly characterises individual instances of international migration as permanent. The fieldwork suggests that this is true for a proportion of migrants but not for the majority. Among the teachers from developing countries sampled in the UK, 38% wanted to settle permanently. Of the South African and Jamaican teachers among this group, a similar proportion expressed this intent. However, the way such teachers were identified probably meant this figure is biased upwards – by drawing primarily on trade union members and those improving their UK qualifications, we have probably over-sampled those migrants wishing to stay for longer in the UK. In Botswana, 27.5% of expatriate teachers in Botswana wanted to settle in the country permanently. The majority of overseas teachers – those who did not intend to settle permanently – differed in how long they worked abroad. In South Africa, trainee teachers commonly planned to work overseas for about two years – as had most returned migrant teachers. In Jamaica, migration seems longer term. In England, overseas-trained teachers had commonly worked for two to four years. In Botswana, reliance on expatriate teachers was a more established phenomenon, with most having taught in the country for around five to ten years. The majority of migrant teachers in both England and Botswana wanted to renew their contracts, although those in Botswana government schools were fairly evenly divided on the question.

The above features of the process of international mobility of teachers have implications for how it is perceived and evaluated. The international movements of teachers are large in absolute terms and are likely to have non-negligible impacts. However, especially for larger countries, their proportionate impact may be quantitatively modest. Nonetheless, working overseas is a career option of interest to many teachers and so not exclusively an issue for just the minority of teachers who take advantage of that option. Rather than being a persistent ‘drain’ on a country, international mobility may often be a short-term response to dis-equilibrium. In practice, only a minority of individual migrants wish to settle permanently, although how long the majority do work overseas varies across countries.

## 2. Normative assessment of international teacher mobility

Much policy discussion of the migration of skilled labour from developing countries presumes that such movements have on balance negative effects. This is evident in the phrase commonly used to refer to such movements – they are a ‘brain drain’. In view of this widespread presumption, it is useful to consider explicitly the normative effects of international teacher mobility. The general issues such an evaluation raises are crucial in considering specific policy responses.

When making an evaluation of international mobility, a range of different value judgements could be taken as the starting point. For example, one could assess the issue in terms of people's freedoms to travel or rights to work overseas. Often these issues may trump other concerns – only authoritarian governments would consider straightforward prohibitions on their citizens leaving to work in other countries. However, there are other potential interventions that sending countries could undertake to discourage such emigration that fall far short of violating simple freedoms or basic rights. Moreover, issues of liberty and human rights seem to be overriding considerations only when countries decide whether to allow their own teachers to leave. With pervasive controls on immigration, countries feel no corresponding obligation to allow other countries' teachers to enter as immigrants.

This conclusion has not adopted a rights or freedom based perspective in assessing international recruitment of teachers, although this is not to deny that such perspectives are relevant. Instead, the focus is on the effects of such recruitment on the interests and overall well being of affected parties. Such interests or well-being can be broadly construed, although the dimensions that are most relevant here are the economic - material living standards - and the educational – learning outcomes. The affected parties could be categorised in a variety of different ways, although for much of the analysis it is helpful to group them into three – the migrant teachers themselves, their compatriots in the sending countries and their hosts in the receiving countries. Within the latter two populations, it may sometimes be useful to make further distinctions – for example, between learners, educators, taxpayers etc. However, it is helpful to see if an aggregation of their interests is possible, as policy should be determined by such an assessment of the overall impact of teacher migration rather than the outcomes for any one interest group alone. When aggregating interests across groups of people, distributional issues are relevant. In particular, the implications for poor people, whose interests may be given added weight by progressive policy-makers, are highlighted.

## 2.1 The interests of migrant teachers

Migrant teachers are the group whose interests in international migration are most straightforward to identify. Since the overall majority move voluntarily (refugees being a small minority), one would presume that they gain from international migration. The higher salaries that can be earned overseas are one of the most common reasons migrant teachers give for working abroad. Teachers from South Africa and Jamaica earn three to four times more by working in the UK rather than in their own countries. Some of this increased pay is taken up in the higher cost of living overseas. However, migrant teachers still manage to earmark substantial proportions – commonly around one or two fifths - of their earnings to send back as remittances or accumulate as savings. The mean proportion of earnings sent back as remittances varied from 8% for overseas teachers as whole in England to 18% among expatriate teachers in Botswana. Among the teachers working in England, Jamaicans remitted 9% of income while South Africans remitted 7% (although the returned teachers sampled in South Africa reported remitting 11%). Savings rates were also high among migrant teachers: 13% among Jamaican teachers in England and among expatriate teachers in Botswana; 14% among overseas teachers in England as whole; and 26% among returned migrant teachers in South Africa.

From an economic perspective, the income gains for migrant teachers moving from developing to developed countries are likely to be seen as the primary welfare effect of international mobility. That the same individuals can be paid more for their labour in one country than another is often seen as *prima facie* evidence of an economic inefficiency. The gain from re-allocating labour between countries in a way that eliminates such inefficiency is the core economic argument for a liberal attitude to immigration. However, as noted earlier income gains are apparently not the only motives for international teacher mobility. In our fieldwork, migrant teachers consistently reported other reasons for working abroad, notably professional development and the opportunity for travel. It is hard to quantify these benefits but judging from how often they are rated as key reasons for migration, they rival higher salary in their importance.

Teachers may lose *ex post* from international migration, even if they expected to gain *ex ante*, if they were misinformed, miscalculated or just unlucky. Such cases do exist – individuals have bad experiences with particular schools or recruitment agencies – and these cases are sometimes highly publicised. However, our surveys suggest that migrant teachers generally receive satisfactory information during the process of recruitment. Only 13% of expatriate teachers in Botswana reported receiving poor or very poor information. In England, the comparable figure was higher but still constitutes a minority at 27%. Moreover, the option of return limits the potential losses from such bad experiences of migration and such cases are clearly not the norm. Most of the migrant teachers we contacted assessed their time working abroad favourably and would recommend the experience to others. Of the returned migrant teachers contacted in South Africa, 91% would recommend teaching overseas and 69% were positive about the experience. Of the expatriate teachers in Botswana, 72% would recommend teaching abroad as would 71% of South African teachers surveyed in the UK.

If the main gains from international recruitment accrue to the migrant teachers, it is likely that any effects on reducing poverty in developing countries are indirect. One cannot regard most migrant teachers as absolutely poor – for example, their local salaries are typically well in excess of the amount needed to keep their families above a “dollar a day” poverty line. Furthermore, relative to the rest of the population, teachers in developing countries are likely to be well paid by virtue of being relatively well educated. However, there are likely to be indirect consequences that reduce poverty if the extra income and perhaps skills accruing to migrant teachers has benefits on those left behind in sending countries.

## 2.2 The interests of hosts in receiving countries

As with the migrants themselves, there is a presumption that receiving countries benefit from international recruitment of teachers. With most countries imposing controls on immigration, one might assume that governments only allow immigrants if they perceive them as beneficial. The fact that government is usually the main employer of teachers provides a further reason for a presupposition that the movements are beneficial to the host country – why would governments employ them if they were not providing a net benefit? However, these arguments presume a degree of rationality and high-mindedness in government decision-making that is perhaps less axiomatic than the assumption that individual migrants act rationally to further their own interests.

In the cases of England and Botswana, it appears that governments recruit overseas-trained teachers because there is insufficient supply of locally trained teachers to meet the demand for posts. This is perhaps clearest in the case of Botswana, which started with a relatively underdeveloped educational system and thus faced difficulties in recruiting local teachers with appropriate educational qualifications. As Botswana has enjoyed very rapid economic growth it has been able, unlike many other developing countries which also started with underdeveloped educational systems, to afford to recruit internationally. This in turn allowed its educational system to develop at a speed and with a quality that was surely superior to that which would have been possible without international recruitment. Consequently, international recruitment of teachers in Botswana in the past is likely to have reduced poverty in the country since strengthening the country's educational system is likely to have both instrumental and intrinsic effects on poverty reduction. The instrumental effects come through strengthened human capacities in the country aiding productivity and the income growth that has lifted people out of absolute poverty. The intrinsic effects arise because education and knowledge are commonly argued to be dimensions of development, entering directly into indicators such as the UNDP's Human Development Index. As a result of its progress, the government of Botswana is now in a position where it can plan to largely replace expatriate teachers within the state school system with locally trained ones.

The case of England is more nuanced: unlike Botswana in the past, it cannot plausibly be said to be incapable of training sufficient local teachers. Instead, reliance on overseas-trained teachers is inextricably linked to issues of teacher pay and working conditions. The alternative to recruiting foreign teachers would not be going without teachers, but measures to make teaching more attractive to locals. Here is one instance where there may be conflicts of interests within different groups. The counterfactual case of measures to make teaching more attractive to locals may well bring benefits to English teachers and be preferred by them to the employment of foreign trained teachers<sup>149</sup>. Conversely, such measures will have costs that taxpayers must shoulder.

More generally, there is a tendency for foreign teachers to be paid less than those trained locally, partly because their teacher training qualifications are not recognised. Again, this implies a potential conflict between cost-savings for taxpayers and possible negative influences on the wages or employment of local teachers, due to existence of a supply of lower paid foreign teachers. From an economic point of view, the cost-savings effect may well be judged to outweigh any negative effect on local teachers, although such an assessment would no doubt be challenged by English trade unions<sup>150</sup>. However, the issue was raised in Section 1.1 about overseas recruitment being a potentially useful transitional measure in responding to shortages must be re-iterated. There are likely to be lags involved in making effective interventions to improve the supply of local teachers and access to international recruitment may reduce the costs of waiting for such measures to work. The fact that England's need for overseas teachers is currently falling underlines this point.

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<sup>149</sup> It is important to note, however, that general measures to improve the supply of local teachers may not be the most efficient response to such localised shortage; more targeted interventions may be more cost-effective. This is because the shortages of UK teachers that give rise to international recruitment appear to be localised. Certain schools find it hard to appoint local teachers and turn to international sources of supply. The reasons for this might be specific to the school – for example, if the school is seen as a particularly problematic one in which to teach – or to the location – for example, if there are high housing costs that are not sufficiently covered by additional allowances.

<sup>150</sup> An analogy might be made here with protection from cheaper imports. Although protection may help local producers, economic analysis implies the gains for them are outweighed by the benefits to consumers of cheaper products. For a simple analysis of the same kind in terms of migration, see Berry and Soligo (1969).

There are also other factors that impact upon the recruitment of overseas-trained teachers. These are: individual school recruitment decisions, the level of system funding (i.e. whether schools can afford to recruit teachers), the accuracy of the DfEs and TDA predictions on perceived supply, management of training numbers and the impact of marketing and incentives.

Does international recruitment of teachers particularly affect poor children in host countries? The expatriate teachers in private schools in Botswana will tend to serve children from more affluent households. In the state sector, staff shortages were more common among schools that reported serving communities that were poorer than average. However, this conclusion is based on a small sample of schools visited, although it finds some support in the opinion expressed during the fieldwork that expatriate teachers are useful because they can be deployed to more remote rural schools that local teachers might not wish to work in<sup>151</sup>. In the case of England, the nationally representative postal survey that the project conducted provided better data on which to form a conclusion. Perhaps the best indicator of poor backgrounds among children in English schools is the proportion receiving free school meals. A cross tabulation of this proportion with the existence of reported shortages revealed no strong statistical association<sup>152</sup>.

It is important not to focus solely on quantitative aspects of international teacher recruitment, such as its implications for shortages of teachers. There may also be effects on the quality of teaching provided. The majority of Head Teachers in both Botswana and England reported that migrant teachers provided an additional contribution to their schools by virtue of coming from overseas. Often this was by making cultural contributions, teaching students about life in other countries. However, the cultural impact of overseas-trained teachers was not a specific focus of this project and an in-depth study remains to be carried out. Overseas-trained teachers were also commonly praised for the effort they put into extra-curricular activities. Nonetheless, Head Teachers held conflicting views on the overall effectiveness of overseas-trained teachers compared with locals. In Botswana, Head Teachers in state schools tended to rate expatriate teachers as being of average effectiveness – comparable to their other teachers. By contrast, in seven of the nine private schools in Botswana, Head Teachers regarded their expatriate teachers as being of above average effectiveness (and the same proportion reported receiving favourable parental feedback on expatriate teachers). This may reflect a difference in the role of expatriate teachers in the state and private sector. In the state sector as discussed above, expatriate teachers are largely making up for shortfalls in local teachers. By contrast, expatriate teachers in private schools are seen as helping to maintain a quality premium that justifies the high fees charged by these elite schools. In England, Head Teachers often tended to rate overseas-trained teachers as being of lower effectiveness than locally trained teachers. This was true in 47% of schools visited, and 45% of school surveyed by post, rated overseas-trained teachers as being less effective than local teachers is also relevant (few schools rated foreign teachers as more effective than locally trained ones). This suggests that pupils and parents may on average pay a cost in terms of less effective teaching by the employment of overseas-trained teachers. It is likely that some or all of this perceived lower effectiveness of foreign teachers could be offset by improved induction and

<sup>151</sup> As reported in the chapter on Botswana, there were staff shortages reported in two of the five government schools visited that reported serving poorer than average areas; another two had reported shortages in the past. A smaller proportion of the other government schools visited reported current shortages – only two of the nine.

<sup>152</sup> A simple logistic regression of a dummy variable for reporting shortages on the proportion of pupils receiving free school means showed a positive but statistically wholly insignificant association.

training in the English curriculum, although such the cost of such hypothetical measures would also have to be weighed in the balance.

Finally, it should be noted that there are indirect welfare effects of immigration on receiving countries due to their tax and benefit systems. Whether these are net benefits or costs will depend on the tax contributions of immigrants compared to the cost of providing government services and benefits to them. A study of the fiscal contributions of UK immigrants in general recently found them to be net contributors (Sriskandarajah, Cooley and Reed, 2005). In part this was because immigrants in the UK earned around 15% higher wages than non-immigrants and thus contributed more in taxes<sup>153</sup>. It is likely that the assessment would be even more positive if one looked solely at migrant teachers in England, as they are relatively skilled as a group. No comparable study of the fiscal contribution of immigrants in Botswana was identified. However, the likelihood that expatriate teachers are net contributors seems even higher than in the UK, since the gap between their wages and the average for the local population is likely to be even greater.

### 2.3 The interests of those remaining in sending countries

The negative connotations of the “brain drain” refer primarily to the effects on sending countries. Nonetheless, it is not always clear what the harm from international mobility is perceived to be. It is true that if skilled workers leave a country, that country’s output will fall – providing the workers would have found productive employment. However, it is not obvious that this adversely affects those left behind. Most of the benefits of the lost output would probably have accrued to the potential migrants themselves in terms of wages paid for their labour. Thus while the sending country loses output, it saves on wages (this point was emphasised early in the literature by Grubel and Scott, 1966). The analysis can be refined to mirror that made for receiving countries. Workers in sending countries may benefit from the emigration of labour, as it increases their scarcity and thus the wages they can command. Several Head Teachers interviewed in South Africa argued that emigration of teachers placed an added onus on the government to improve teacher pay and conditions in South Africa. In the memorable words of one head teacher and former trade unionist, teacher migration signalled that it was time for the government “to wake up and smell the coffee”. However, such pressures for higher teacher wages clearly imply an economic cost for parents and/or taxpayers in South Africa. As in the discussion of England, simple economic analysis suggests that these costs may outweigh any beneficial effects on non-migrant wages<sup>154</sup>. Hence, there is an economic case for arguing that international migration may harm those left behind. In the case of teachers, emigration will put pressure on the Ministries of Education to raise local teacher wages. This will add to the budget without, in the first instance, improving the value added provided by the educational system. Nonetheless, such effects are arguably rather second order, mirrored by corresponding second order benefits for hosts and probably outweighed by the first order income gains to the migrants themselves.

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<sup>153</sup> Each immigrant was estimated to generate £7,203 in government revenue on average in 2003-04, compared to £6,861 per non-immigrant. Similarly each immigrant accounted for £7,277 of government expenditure on average, compared to £7,753 per non-immigrant.

<sup>154</sup> Again, Bery and Soligo (1969) show this in a simple model. Higher wages lead to reduced output and this reduces aggregate economic welfare in the sending country by the extent to which the lost output is valued above its cost. Too much reliance should not be placed on this simple model, as the economic literature has since focussed on more complex models with market imperfections that sometimes have very different welfare implications. However, the simple model arguably reveals a fundamental aspect of the problem, if not the only one.

A further set of economic considerations surrounds the cost of training teachers to replace migrants and in particular the subsidy paid for such training by sending governments. This is a fiscal cost to the sending governments, although whether it constitutes an overall economic cost depends partly on the rationale for the subsidies. If such subsidies have no rationale but are seen as simple economic ‘distortions’, then it is clear that migration – by increasing them – may worsen economic efficiency. However, such an argument seems rather unsatisfactory, since the immediate implication – in economics the ‘first best’ solution – would be that such training should not be subsidised rather than that emigration should be discouraged. Alternatively, teacher training might be subsidised by the government – along with other forms of higher education – in order to help students overcome credit constraints or simply as a form of a redistribution transfer in kind to them. If these are the reasons for such subsidies, whether students subsequently work in their own country or not seems irrelevant. However, a third possibility is that teacher training is subsidised because there are believed to be extra benefits from such education (“externalities” in economic terms) that are not captured by the student in higher wages. These extras may be contingent on the student working in their own country or, more plausibly, sending governments may only care about extra benefits which accrue to their own country. Under this rationale, governments may feel aggrieved about subsidising teacher training for external benefits that do not then accrue to their own countries and this constitutes one cost of teacher migration.

How large the costs are depends partly on the subsidy paid for teacher training and partly on how much time migrants would spend teaching in their home country. In South Africa, the costs may be modest. The government reports that it costs R60-80, 000 to train a teacher (on a three or four year course). Students appear to pay around half of this cost themselves in fees. The cost to the government, therefore, is around US\$5,200 (at 1R=\$0.15). If migrants only spend around two years working overseas (as returned teachers typically reported and as trainee teachers commonly intend), the waste or extra cost to the government in terms of training costs appears limited. This conclusion is reinforced by the fact that South African migrant teachers appear likely to return to the teaching profession when back in their own country. The issue of training costs may be more significant for Jamaica. This is not because teacher training appears more expensive in Jamaica than South Africa<sup>155</sup>. Instead, it is because Jamaican migrant teachers seem to stay for longer periods abroad, be less likely to return and, if they do return, less likely to work as teachers<sup>156</sup>.

Wider issues concerning the fiscal contributions of migrants have not been considered. By the same logic that implied migrant teachers were likely to be net fiscal contributors in host countries, their departure is likely to have negative fiscal implications for sending countries. However, this cost may be offset to some degree by the taxes paid on any money that the migrants’ repatriate, whether through remittances or savings. In the case of South Africa,

<sup>155</sup> The cost to the government of teacher training in Jamaica varies widely, with the University of West Indies (UWI) apparently costing the state around six times as much to train a teacher as the median teacher training college (see Section 4.3.1 of the chapter on Jamaica). In the absence of data on how many students are trained at each institution, we might focus on that with the median cost to the government - Moneague College which costs J\$87,771 per student per annum. A three year course would cost the state US\$4,300 exclusive of scholarships (at J\$1=\$0.016).

<sup>156</sup> The small proportion of Jamaican teachers in the UK (and expatriate teachers in Botswana) who intend to work as teachers upon return to their country of origin is not necessarily a problem. To the extent that they still wish to work in the education sector, their teacher training is likely to still retain some value for them. Moreover, the frequently expressed intention to enter self-employment may be regarded positively by most developing countries that wish to foster entrepreneurial activity and wealth creation.

another “back of an envelope” calculation implied that the tax levied on repatriated earnings might be commensurate with the “loss” imposed on the government through funding the migrants’ teacher training. The reported remittance and savings rates of Jamaican migrant teachers were close to those of their South African counterparts.

The focus of the research has not been to quantify such economic effects, but rather to examine the impact on schools of international teacher recruitment. A particular concern was whether such recruitment contributed to teacher shortages in the sending countries and if there were negative impacts on the education of pupils in South Africa and Jamaica. If there were such negative impacts, these may well aggravate poverty. This is partly because educational deprivation might be regarded as an intrinsic dimension of poverty, broadly defined. It is also because of the instrumental effect of educational deprivation on income poverty in adulthood and other forms of deprivation (for example, in terms of health). Essentially, the issue of whether international recruitment worsens educational outcomes at the school level depends on how well the educational system in the sending country adjusts. If migrant teachers are replaced efficiently by more locally trained teachers, there need be no such adverse effects. However, such smooth adjustment would require well functioning institutions and – in the light of the economic discussion in the previous two paragraphs – increased funding.

Perhaps the key finding from the visits to schools in both Jamaica and South Africa is that it was not possible to identify international teacher recruitment as a cause of harmful shortages of teachers. In only two of the eleven South African schools visited that had experienced international migration, could this migration be said to have led to shortages that diluted the quality of education provided. Moreover, in both cases, the adverse effects were described as modest<sup>157</sup>. In Jamaica, only one case was found where international recruitment had led directly to harmful shortages<sup>158</sup>. Even then that situation had occurred in the past and the shortage no longer existed at the time of the interview. Moreover, in neither Jamaica nor South Africa, did international migration appear to impact disproportionately on pupils from more disadvantaged backgrounds. Indeed, the reverse was probably true, as teachers from the better-resourced schools were more likely to be internationally recruited.

While it was possible that such recruitment might lead to shortages that “trickle down” to more disadvantaged schools, the interviews suggested that such indirect effects were limited. This was partly because teachers from disadvantaged schools – non-traditional high schools in Jamaica and former African schools in South Africa - were unlikely to be considered as replacements for migrant teachers in better resourced schools. There were indications that some former Indian and Coloured Schools may be facing shortages. Teachers in these schools are more likely to be internationally recruited and may also be hired to replace departed migrant teachers in former white school, but the governing bodies of such schools may be reluctant to recruit some available African teachers due to concerns over their quality. In both South Africa and Jamaica, there was some tendency for migrant teachers to be replaced by newly trained teachers. This might be thought to reduce the pool of available candidates for disadvantaged schools. However, in South Africa, there appears to be something of a pool of unemployed African

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<sup>157</sup> In one case, the school had not been able to offer subjects that students requested and class sizes had had to be increased, leading to more time being spent on maintaining order rather than teaching. In the other case, one teacher in particular had been placed under great pressure to teach at the junior primary level, despite not having been trained for it.

<sup>158</sup> This was a case of an urban high school that had lost a maths teacher and had a shortage of maths teachers.

teachers already and it is not clear to what extent newly qualified teachers – who appear to be something of a sought after commodity - would actually work in disadvantaged schools. In Jamaica, some newly qualified teachers expressed gratitude to international recruitment for providing them with openings and reducing the risk of unemployment.

The conclusion about the impact of international teacher mobility on schools in both Jamaica and South Africa is that any effects were more likely to be qualitative than quantitative. It was not so much that teacher recruitment was causing quantitative shortages of teachers, rather that it was tending to lead to losses of those that were particularly effective. In South Africa, Head Teachers rated 70% of their teachers who had been internationally recruited as being of above average effectiveness. In Jamaica, 48% of Head Teachers said that internationally recruited teachers were more effective than the teachers who replaced them. In these two countries, international teacher mobility may not impede the attainment of goals in terms of the quantity of education provided but may somewhat erode the quality.

### 3. Policy implications

In the four countries studied, it does not appear to be appropriate to regard international teacher mobility as a persistent or harmful “brain drain”. However, there are some negative aspects for sending countries. The research highlights the loss of particularly effective teachers. There may also be costs in terms of teacher recruitment, pay and reduced fiscal contributions. However, the negative aspects are not as widespread and severe as might be expected from the language in which this issue is often discussed. In particular, no evidence was found that the school systems in either Jamaica or South Africa are suffering from major teacher shortages as a result of international recruitment of teachers. Moreover, these negative aspects must be weighed up against the large gains in earnings to migrants, a substantial proportion of which is sent back in remittances or repatriated as accumulated savings when the migrants return home. In addition, there are positive aspects to international mobility of teachers for receiving countries that often mirror the negative aspects for sending countries. Consequently, the authors would not wish to see policy discussion of the issue premised on the assumption that such movements should be stopped, reduced or limited. Trying to impose quotas or controls on the international mobility of teachers would not appear to a sensible policy response.

Whether there is a case for actively encouraging migration of teachers from developing countries is more debatable. From an economic perspective, the large disparity in the potential earnings in developing and developed countries is *prima facie* grounds for believing there is would be substantial gain from such movements. Large-scale movements are limited by pervasive immigration controls in developed countries. Nonetheless, some governments in developed countries – notably the US and Canada, but increasingly the UK - are alert to the possible benefits to their own countries from accepting skilled immigrants in particular. Based on this research, the authors would be sympathetic to a liberal stance on this issue. However, this is primarily a question for receiving countries since it is controls on immigration, rather than any barriers imposed by sending countries that currently constrains international mobility of labour.

In terms of the impact of international teacher mobility on poverty in developing countries, the four case studies imply that the effects are likely to be second order. The main beneficiaries, the migrant teachers, are not themselves likely to be categorised as poor – neither relative to the sending countries’ populations as a whole nor in absolute terms (e.g. by ‘a dollar a day’ measure). The increased earnings they acquire from working overseas may have beneficial second order effects, if it is spent in their home countries. The intention of many migrant teachers from Jamaica and in Botswana to set up their own businesses on return also signals an important secondary channel by which migration may reduce poverty in sending countries. The case studies also imply that the negative aspects of international migration on sending countries will not fall disproportionately on the poor. Indeed, if anything, migrant teachers from South African and Jamaica appear more likely to have taught in schools that served more affluent communities and no evidence was found to suggest that their absence would cause worrying “ripple effects” on disadvantaged schools. In Botswana, expatriate teachers may have a relatively “pro-poor” impact within the state sector, although they also play a disproportionate role in serving elite private schools.

Perhaps the most constructive approach to formulating policy responses to international teacher mobility is to focus on initiatives that may limit the negative aspects and accentuate the positive ones. The emphasis should be on managing the process of international recruitment to maximise the net benefits, rather than seeking to control or stifle it. What are the policy responses open to sending countries and to host countries? First, there is the problem of how to manage teacher shortages? This is an issue that is common to both sending and receiving countries. Secondly, what are the policy responses that would require bilateral (or multilateral) agreement between sending and receiving countries? Finally, what are the policy responses that are specific to either sending or receiving countries and could be implemented unilaterally?

### **3.1 The common policy problem of managing teacher shortages**

Both countries that receive and countries that send migrant teachers typically face problems of teacher shortages. Indeed much of the discussion of both the causes and the consequences of international teacher mobility centres on the issue of teacher shortages. Receiving countries recruit internationally because they face shortages of local teachers. Sending countries may protest over “poaching” because such international recruitment leads to shortages in their own schools.

Part of the appropriate policy response to teacher shortages is to consider teacher remuneration. For developed receiving countries, it is important to make sure that teacher salaries are competitive with those of other occupations. In some developing sending countries such as South Africa, there is no evidence that teacher salaries are too low relative to domestic alternatives<sup>159</sup>. Meeting the salaries of receiving countries – and raising teacher wages three or fourfold – would not appear to be feasible. Often shortages are specific to certain subjects – such as maths and science – or to certain locations (or even particular “problem” schools). Rather than across the board pay rises, special incentives may be the most efficient way of dealing with specific bottlenecks. The UK has recently introduced measures of this kind and these appear to be reducing the need to rely on overseas-trained teachers. This experience may have lessons for

<sup>159</sup> Analysing wage data in South Africa, Crouch and Perry (2003) found that teachers appeared to be paid more than non-teachers, controlling for their education and experience.

countries such as South Africa that are currently debating the issue of special incentives, often in the face of opposition from some trade unions.

It is sometimes argued that the appropriate response to international teacher migration is better manpower planning by Ministries of Education and improved liaison with teacher training institutions. Certainly, there is scope for better record keeping by governments, especially at the level of subject specialisms. Careful projections of needs in particular subject areas would also be useful in guiding educational planners. However, we are sceptical of whether state planning is ultimately the solution to mismatches between supply and demand. Responses from Head Teachers in South Africa implied that most teacher shortages experienced by schools were due to bureaucratic delays and inefficiencies by the Ministry of Education. Likewise, concern in South Africa over the small supply of newly trained teachers appears in large part due to government decisions to close many teacher-training colleges. Instead of relying on explicit manpower planning, governments may be better served by letting the market for teachers clear. With adequate remuneration, there should ultimately be a sufficient supply of young people willing to train as teachers. It is important that the teacher training systems be flexible enough to accept this supply. Rather than set quotas for teacher training, institutions should be able to expand (or contract) supply according to the number of people wishing to receive such training. This is particularly important for sending countries who will need to train more teachers in order to replace those who migrate. If teacher-training institutions in the public sector are unable or unwilling to meet this challenge, private sector alternatives should be accredited and permitted to take on the task<sup>160</sup>. There are clearly important implications here for the level of government subsidy for teacher training, which we address below when discussing specific issues for sending countries.

Relying on incentives and increases in the supply of newly trained teachers may be the ultimate solution to teacher shortages. However, there are likely to be lags in this supply response – both because teacher training courses may take three or four years, and because it may take time for information about shortages and demand for teachers in particular areas. As previously discussed, international recruitment is a common way of managing the transition during this disequilibrium. However, there are other alternative or complementary possibilities such as on-the-job training or retraining already trained teachers who are either unemployed or have specialisms that are not in demand.

### 3.2 Bilateral policies on international recruitment

#### *The vexed issue of compensation*

There has been considerable debate over whether receiving countries should compensate sending countries for recruiting their teachers, specifically where the movements are South-North. Although initially not unsympathetic to the case for compensation, the research has led the authors to question whether this should be the focus of policy discussion? In part, this is because the harm supposedly done to sending countries by international recruitment of teachers does not seem to be as great as might have been thought. At least in the case of South Africa and Jamaica,

<sup>160</sup> An analogy here might be with the boom in private IT training institutions in India in response to the international demand for IT services from India.

the educational systems of sending countries seem to be coping with the outflow of teachers. If the concern is merely with the monetary costs to developing countries of training teachers who subsequently work elsewhere, then a number of points can be made. First, the research suggests that migrant teachers are often fairly experienced before they move. Also, at least in the case of South Africa, they often work overseas for relatively short periods and return to take up teaching posts. Hence, it is not clear that subsidies for training teachers who subsequently migrate have been wasted, even from a narrow perspective of national self-interest. Secondly, at least some of the subsidy for teaching training is presumably justified on the general grounds of helping young people who might not be able to afford the cost of post-school education, rather than specifically to provide benefits to local education systems. Governments do not require compensation for subsidies made on these grounds. Thirdly, it is not clear that seeking international compensation is preferable to making migrants bear an increased (or full) share of their training cost. If there are problems with introducing greater user charges for teacher training, this may return the argument to the second point. This is that subsidies for teacher training must be justified in terms of assisting young people investing in human capital, not necessarily in terms of their benefits to the national school system.

There are also practical problems with compensation. It is not in the interest of countries receiving international migrants to agree to such transfers, in which case pressing the issue is likely to sideline any constructive response to international migration. Furthermore, even if receiving countries were to agree to pay compensation, there would be formidable technical problems in measuring the flow of migration and quantifying the required level of compensation. Our research has shown how little reliable data there is on international recruitment of teachers, on how long they stay and whether they settle, on training costs in developing countries etc. Beyond these informational problems, there are also question marks about the capacity of governments to implement a scheme of compensation. International teacher mobility is arguably often in response to failures in national educational planning. It is not obvious that increased educational planning, now extending to a more complex international arena, is the appropriate response.

However, there may be measures that receiving countries can implement to assist sending countries cope with international recruitment of teachers that fall short of direct, formal financial compensation. Where the migration is South-North, such measures might be appropriately considered within the receiving country's aid budget. Some developed countries such as the UK increasingly focus their aid budget on poorer people within the poorest countries. However, given that their recruitment of teachers does give rise to challenges for some sending countries, there would seem to be an ethical case for providing some assistance to cope with these challenges. This case would hold even if, as in the case of Jamaica and South Africa, the sending countries are lower middle income, rather than the low income, and the challenges do not impact disproportionately on the poorest within those countries. Consideration should be given to the specific methods by which the British Government could assist developing country governments. This may be through the funding and development of teacher exchanges, the secondment of key personnel from the DfES to developing country education ministries to share good practice or through offering specific programmes to enhance the professional development of teachers.

### *Bilateral agreements on teacher recruitment*

Since international teacher mobility often involves movements from the state sector of one country to that of another, there is a case for considering agreements between the two governments to manage that process. These agreements could provide a framework for induction and further training of migrant teachers so that they can operate at full effectiveness within the host country. Such training would clearly benefit the host country and also the migrant, if - as would be expected - it gives access to higher pay. Sending countries may also benefit to the extent that the training has relevance when migrants return to teach in their own countries<sup>161</sup>. Organising the training under a bilateral agreement may help assure that training provided by host countries to migrant teachers is also valued by sending countries and would be recognised by them. At the very least, one might expect such training to have value to sending countries partly because it exposes their teachers to new ideas and partly because - bearing in mind that many migrants are experienced teachers - it acts as a kind of a “refresher” course.

Bilateral agreements may also specify a particular expected duration of stay overseas. Providing an organised framework for relatively short stays abroad - for example, two or three-year stays - might assist sending countries in inducing migrants to return. The training provided under such agreements might be conditional on the migrants returning after a certain period. Receiving countries may also have a common interest here, if they wish to discourage permanent settlement or rely only temporarily on overseas-trained teachers. Similarly, if such schemes prove successful and most migrants travel under them, this will assist both sending and receiving countries in their manpower planning. However, it is stressed that, since the authors see a strong case for limiting or discouraging international recruitment, any such agreements to manage migration should not be compulsory or prohibit individual recruitment outside of their framework.

### *Teacher exchanges*

The relatively high interest in teaching overseas expressed by teachers in host countries implies some potential for teacher exchanges. It is not clear to what extent this would lead to significant movements of teachers from North to South. When teachers in England or Botswana express an interest in working overseas, they may be thinking more of developed countries such as the US or Australia, rather than developing countries such as South Africa and Jamaica. A drying up of the supply of English teachers going to Botswana led that country to recruitment in the Caribbean and in nearby African states. However, the surveys did imply some potential for North-South movements to the extent that teacher migration was often said to be valued for professional development and travel rather than just salary. Providing greater opportunities for teachers in host countries to act on their expressed interest in working overseas may induce more of a two-way flow of personnel and defusing some of the problems associated with a one-way “brain drain”.

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<sup>161</sup> In this regard, it is interesting that while Jamaican and South African Head Teachers tended to rate the teachers they had lost to international recruitment as particularly effective, English Head Teachers tended to rate their overseas teachers poorly. This suggests that migrant teachers may well have natural ability and potential. If they under-perform in English schools because of inadequate induction and preparation for the specifics of the English curriculum, then clearly England has some interest in trying to overcome this deficiency. Conversely, if migrants under-perform because their training has been of generally lower quality than that provided to English trained teachers, then the sending country may benefit when migrants return having experienced higher quality English training.

### 3.3 Policy responses in receiving countries

#### *Training of overseas teachers*

The issue of providing adequate induction and training for overseas-trained teachers was mentioned above, when discussing bilateral agreements on recruitment. A requirement of some orientation and induction in any recruitment contract would seem to be warranted. More general issues over teacher training appear to be more of an issue for England than Botswana, since only among English Head Teachers did there seem to be widespread concern about the effectiveness of overseas trained teachers. Furthermore, overseas-trained teachers in England frequently voiced frustration over training related issues. They objected to not being granted Qualified Teacher Status despite often having great teaching experience. The fact that they were often labelled as 'instructors' rather than teachers was seen to add insult to the perceived injury of lower pay.

The fact that overseas trained teachers (OTTs) were often rated as being of lower effectiveness by English head teachers does give some pause for thought when considering altering training requirements and salary scales in favour of OTTs. However, there is a case for ending the practice of referring to OTTs as 'instructors' and unqualified in order to avoid needless offence. Some re-examination of the QTS system would seem to be called for, especially in light of the fact that European citizens automatically gain it even though they have not met the QTS standards. This is particularly important in the case of the most skilled OTTs - those that have great experience abroad or high qualifications (e.g. a Masters in Education). If necessary, a system of peer observation or some form of quick, simple assessment might be used to confirm that OTTs should be paid on the same scale as QTS trained teachers, rather than being on the current instructor scale.

#### *Improved information gathering*

While Botswana appears to collect accurate data on international recruitment of teachers, recording keeping on this issue in England could be improved. The DfES should collect statistics on the numbers of overseas-trained teachers working in English schools. Amending the question on Form 618g could simply do this. We would also recommend that a system is devised to register all overseas trained teachers working in England and that the registration is organised and managed by the General Teaching Council (GTC). This would allow an accurate picture of the amounts of overseas-trained teachers, their qualifications, subject specialisms and origins.

### 3.4 Policy responses in sending countries

#### *Facilitating the return of teachers*

International teacher mobility is likely to be particularly beneficial to sending countries if migration is temporary, as this is likely to increase the extent to which overseas earnings are repatriated and - if the teachers return to their old profession - will relieve some of the pressures on their school systems. In the case of South Africa, it appears that migration is often temporary and returned teachers do re-enter the profession. In the light of this, it might be appropriate for

the government to consider allowing teachers to take unpaid leave to work abroad for a few years. This was possible until a few years ago, but then deliberately ruled out in order to discourage international recruitment. Given our conclusion that international recruitment should not be discouraged, this ruling should be reconsidered. In particular, the finding that the more effective teachers are leaving would seem to imply that Head Teachers might value the ability to try to encourage these teachers to return. In the one private South African school visited, the head teacher reported that she used unpaid leave to hold on to her more valued staff. However, she had not offered this to a relatively new member of staff, who had left at an inconvenient time and without having served at the school for a number of years. Re-introducing unpaid leave for short term migrants, but making it at the discretion of the head teacher might be a compromise between the old liberal approach to the issue and the new more punitive one.

In Jamaica, the problem of encouraging teacher return appears more challenging. Creative approaches to the ways in which returned teachers can add value might encourage returned teachers to re-enter the education system, thereby ensuring that the Jamaican government get the full benefit of their experience. Returned teachers could be assessed to be Master Teachers, to be mentors to colleagues, to be involved in curriculum development, for example. Providing more ways for migrant teachers to pass on what they have learnt may also be desirable in South Africa. Some returned teachers contacted in South Africa felt frustrated that there was no channel by which they could pass on the new skills and ideas that they had acquired. Much more consideration could be given to the recognition of professional development skills that are acquired abroad.

### *The funding of teacher training*

Clearly, since teacher training is typically subsidised by the government, this has fiscal implications. In countries such as Jamaica, where international migration is proportionately large and may often be long term, it may be appropriate to increase the extent of cost sharing. To the extent that governments choose to continue to subsidise teacher training, this may best regarded as something done to enhance the earnings power of the individual student, rather than to provide benefits to the national school system. Such a rationale may in turn imply a more targeted approach to state subsidies, so that they are confined to those unable to pay the full cost of the required investments in training personally. Where governments continue to justify subsidies on the grounds of their benefits for national schools, they may wish to make them conditional on them working for a period in national schools. Some bursaries for teacher training students already have such stipulations. However, too much reliance should not be placed on such “bonding” as the study shows that migrant teachers are often relatively experienced and so would usually have worked out any period of “bonding” by the time they migrated.

## **4. An agenda for further research**

This research has focussed on only four countries - it would be interesting to see to what extent the findings can be generalised to other countries. Among the developed countries, the US stands out as an important net receiver of migrant teachers - for example, from Jamaica. A study could be undertaken which examines the impact of the recruitment of Caribbean teachers to the

United States. Australia would also provide an interesting example of a developed country that sends significant numbers of teachers to work overseas. Among developing countries, two middle income countries - Jamaica and South Africa, were selected for this project. It would be interesting to consider the impact of international recruitment on a poorer country. Extending the coverage to include Asia - for example, by covering India, would be of some benefit.

This research was also specific in time - it would be interesting to re-examine the issue in say five years time to see how it has evolved. There are indications that Botswana and England are reducing their dependence on expatriate teachers. However, concern is mounting in South Africa over the possibility of teacher shortages in the future - due to the HIV/AIDS epidemic and the demands of a new curriculum, as much as to international mobility.

This project has adopted a case study approach, often being obliged to conduct fieldwork on rather small and not statistically representative samples of schools. It would be interesting to see if some of the findings in the report could be generalised to larger, nationally representative samples. However, such research would be expensive. Better administrative record keeping could go some way to improving knowledge of the issue. The governments of sending countries such as those of South Africa could maintain records of international teacher migration and return to gauge the impact of the outflows. In the absence of better official data, professional bodies such as teacher trade unions could provide a close substitute in highly unionised environments such as South Africa. In Jamaica, an investigation should be commissioned to examine the full cost implications of training teachers in order that the MOEYC can better determine the short and long-term cost implications of teacher migration. In Botswana, an assessment should be conducted on the impact of HIV/AIDS infection on the teaching population through anonymous testing, as has been undertaken in South Africa by the ELRC. This will give a better understanding of the real impact of HIV/AIDS on teachers and allow for future planning.

Given the emphasis here on the qualitative effects of teacher mobility, it would be interesting to see if head teachers' ratings of teacher effectiveness was supported by more objective measures of effectiveness, for example, based around measures of teacher's contribution to students value added in terms of educational achievement. More generally, it would be interesting to see the extent to which teacher shortages and international recruitment directly impacted on learning outcomes for children - for example in examination performance or in international comparative tests. Studies of the effectiveness of overseas teachers in English schools would be interesting to test their Head Teachers tendency to rate them as below local teachers. This could be linked to research into professional development needs of overseas-trained teachers and what kind of induction or training they require. We would also welcome a more in-depth study that explores the special cultural contribution ascribed to teachers by virtue of their having come from overseas. This might include an investigation of the extent to which Jamaican teachers working in England and the United States can 'add value' when teaching children of Caribbean heritage.

Given the project's inability to find significant numbers of returned migrant teachers in Jamaica, further research could be undertaken on the numbers and roles of returned teachers in order to determine exactly what impact they are having or could have on the Jamaican education system (whether in schools or administration). An exploration as to why Jamaican teachers who are planning to return to Jamaica do not want to return to teaching would also be of interest.

Although not focussed on international migration per se, one finding in all three developing countries visited was the problem of attracting good teachers to schools in remote areas. Research into the level and nature of the incentives that would be required to overcome this problem would be welcome. Similarly, the role of the Post Provisioning Norm system of allocating teachers to schools in South Africa should be investigated. The impression from our school visits was that this system - of adjusting year on year teachers between schools according to pupil numbers - caused considerable instability for both teachers and head teachers while bureaucratic problems with implementation appeared to be the primary cause of teacher shortages in the country. Indeed perhaps the central finding of this project is that while teacher shortages do exist in some developing countries, these are not primarily attributable to international recruitment and other domestic issues may be a higher priority for future policy research.

A mid-term review meeting of the 15th Conference of the Commonwealth Education Ministers (15CCEM), by the Caribbean Region and Canada, took place in Nassau, Bahamas, from 28 to 30 July 2005. The review meeting enabled the delegates to discuss progress on the Commonwealth Teacher Recruitment Protocol. The meeting confirmed the view of Ministers that international teacher recruitment and mobility remained an important policy issue, and they emphasised the need for it to be considered within the wider framework of the migration of the highly skilled and for the Protocol itself to be given a wider international impact (Commonwealth Secretariat, 2005b). The meeting reaffirmed the agreement reached by the Commonwealth Teacher Recruitment Protocol (Commonwealth Secretariat, 2005a) that the issue should continue to be monitored and policy reviewed at the 16th Conference of Commonwealth Education Ministers to be held in South Africa in 2006. This would ensure that this very important international public policy issue continues to receive the high-level inter-governmental attention that it merits.



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## Appendix 1

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### The Commonwealth Teacher Recruitment Protocol

This was adopted by Ministers of Education at Stoke Rochford Hall Conference Centre, Lincolnshire, United Kingdom on 1st September 2004. The Motion was moved by the Minister of Education of Jamaica, Hon. Maxine Henry Wilson and seconded by the Minister for Higher Education of the United Kingdom, the Rt. Hon Alan Johnson. Key excerpts from the Protocol are given below.

#### The Purpose of the Protocol

##### Paragraph 2.3.1 states:

‘This Protocol aims to balance the rights of teachers to migrate internationally, on a temporary or permanent basis, against the need to protect the integrity of national education systems, and to prevent the exploitation of the scarce human resources of poor countries. The Protocol also seeks to safeguard the rights of recruited teachers and the conditions relating to their service in the recruiting country.’

##### Paragraph 2.3.2 states:

‘In doing so, the Protocol seeks to promote the positive benefits which international teacher migration can bring and to facilitate the sharing of the commonwealth of human resources that reside within the Commonwealth.’

##### Paragraph 2.3.3 states:

‘This document is similar in terms of purpose, content and status to the Commonwealth Code of Practice for health professionals. It holds moral authority on the matters it addresses. Within the context of the Commonwealth principles of co-operation and consensus, and within the framework of relevant international and other agreements, governments will subscribe to the Protocol and implement it, maintaining the integrity of their national education systems.’

##### Paragraph 2.3.4. states:

‘Although this Protocol does not hold any legal authority, all the member countries are encouraged to develop such regulations and legislation that are necessary to meet the commitments of this Protocol.’

### Rights and Responsibilities of Recruiting and of Source Countries

#### Paragraph 3.1. states:

‘It is the responsibility of the authorities in recruiting countries to manage domestic teacher supply and demand in a manner that limits the need to resort to organised recruitment in order

to meet the normal demand for teachers. At the same time the right of any country to recruit teachers from wherever these may be obtained is recognised.<sup>7</sup>

**Paragraph 3.2 states:**

'It is recognised that the organised recruitment of teachers may be detrimental to the education systems of source countries, and to the costly human resource investments they have made in teacher education. Recruiting and source countries should agree on mutually acceptable measures to mitigate any harmful impact of such recruitment. Where requested by source countries, recruiting and source countries shall enter into bi-lateral discussions and make every effort to reach an agreement which will provide for such measures. Consideration will be given to forms of assistance such as technical support for institutional strengthening, specific programmes for recruited teachers, and capacity building to increase the output of trained teachers in source countries.'<sup>7</sup>

**Paragraph 4.3. states:**

'It is the responsibility of source countries to manage teacher supply and demand within the country, and in the context of organised recruitment. The country should effective strategies to improve the attractiveness of teaching as a profession, and to ensure the recruitment and retention of qualified teachers in areas of strategic importance. Source counties should be advised of the necessity to establish policy frameworks which set out clear guidelines as to categories of teachers whose recruitment they will not support, in order to protect their most scarce resources.'<sup>7</sup>

## **Monitoring, Evaluation and Future Action**

**Paragraph 5.2 states:**

'Education Ministers should undertake a regular review of the operation of the Protocol commencing at the 16th CCEM. The review should be informed by effective monitoring undertaken by education ministries in consultation with all stakeholders including the teacher unions and co-ordinated across the different regions of the Commonwealth.'<sup>7</sup>

**Paragraph 7.3 states:**

'In order to understand the scale of teacher mobility within the Commonwealth, it is suggested that a comprehensive study of such teacher flows is undertaken. This should include both organised teacher recruitment and the more informal modes of teacher migration. This study would complement and develop the work which has been completed by the Commonwealth Secretariat and that which is currently being undertaken by the University of Nottingham.'<sup>7</sup>

**Paragraph 7.4. states:**

‘The Commonwealth, shall in collaboration with international organisations such as the ILO and UNESCO, seek to promote this protocol as an international standard of best practice in organised teacher recruitment.’

The Protocol further sets out the conditions for an acceptable as a recruiting process, for the employment conditions and rights of recruited teachers and their individual responsibilities towards both current and prospective employers. There is also a set of Appendices.

The full text is available from:

The Education Section,  
Social Transformations Division,  
The Commonwealth Secretariat,  
Marlborough House,  
Pall Mall,  
London, SW1Y 5HX,  
United Kingdom.  
[www.thecommonwealth.org](http://www.thecommonwealth.org)



## Appendix 2

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### The Advisory Group

This met five times at the Institute of Commonwealth Studies, University of London over the course of the project. The meetings were held in January, April, September of 2004 and January and May of 2005. Thanks to Professor Tim Shaw for the use of the Institute of Commonwealth Studies and to Mr Richard Bourne for organising the meetings.

The Advisory Group members were:

Mr Richard Bourne	Head, Commonwealth Policy Studies Unit
Mr Robert Cheesman	National Union of Teachers
Mrs Delores Cooper	Jamaica High Commission
Dr Gari Donn	Commonwealth Secretariat
Mr David Jobbins	Times Higher Education Supplement
Dr Joanna Lemetais	Independent Consultant
Ms Rita Odumosu	Confederation of Children's Services Managers
Professor Michael Omolewa	Ambassador and Permanent Delegate of Nigeria to UNESCO
Ms Karen Richardson	National Union of Teachers
Mrs Bandie Ramothibe	Botswana High Commission
Professor Tim Shaw	Institute of Commonwealth Studies
Mr Steve Sinnott	National Union of Teachers
Mr Chris Waterman	Confederation of Children's Services Managers



## Appendix 3

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### The Partner Institutions

#### University of Kwa-Zulu Natal

Professor Anabanithi Muthukrishna

Dr Volker Wedekind

Dr Carol Bertram

#### University of the West Indies (Mona)

Professor Zellyn Jennings

Professor Hyacinth Evans

Dr Karen Carpenter

Mrs Arlene Supersad

Ms Racquel Bremmer

Ms Audene Henry

Mr Andre Sherriah

Ms Daidrah Smith

Professor Elizabeth Thomas-Hope

Ms Indra Vincent

Mr Howard Lee

#### University of Botswana

Dr Kgosi Motshabi

Mr Owen Pansirio

Mr Tshepo Motshabi

Ms Omkemetse Tsimanyane

#### The Commonwealth Policy Studies Unit, Institute of Commonwealth Studies, University of London

Mr Richard Bourne



## Appendix 4

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### Interviewees

#### South Africa

Ms Rashida Bobat, Deputy Chairperson, South African Democratic Teachers Union, Durban  
 Mr Rej Brijraj, Chief Executive Officer, South African Council for Educators  
 Ms Edith Dempster, University of Kwa-Zulu Natal  
 Mr Ndaba Gewazaba, Provincial General Secretary, South African Democratic Teachers Union  
 Mr Duncan Hindle, Deputy Director of Planning, Ministry of Education, Pretoria  
 Ms Adele Jones, Lecturer and Returned Teacher  
 Mr Solly Mabusela, South African Democratic Teachers Union  
 Mr Basil Manuel, Association of Professional Educators of Kwa-Zulu Natal  
 Dr Simon McGrath, Human Sciences Research Council, Pretoria  
 Ms Barbara Payne, Department for International Development Office, South Africa  
 Dr Labby Ramrathan, University of Kwa-Zulu Natal  
 Dr Jairam Reddy  
 Professor Michael Samuel, Ministerial Committee on Teacher Education, Ministry of Education, Pretoria  
 Two recruitment agencies.

#### Jamaica

Ms Beverley Allan, Head of Planning, Ministry of Education, Youth and Culture  
 Ms Margaret Bowie, Permanent Secretary, Ministry of Education, Youth and Culture  
 Ms Adele Brown, Chief Education Officer, Ministry of Education, Youth and Culture  
 Dr Adolph Cameron, Jamaica Teachers Association  
 Dr Rae Davis, President, University of Technology  
 Ms Elaine-Foster Allan, Shortwood Teacher's College  
 Mr Errol G. Graham, Liaison Officer, World Bank, Kingston, Jamaica  
 Ms Haidee Heron, HEART Academy  
 Dr Franklin Johnston, International Management Consultant  
 Mr Jaspar Lawrence, Deputy Regional Education Officer, Ministry of Education, Youth and Culture  
 High Commissioner Peter Mathers, British High Commission  
 Professor Rex Nettleford, Vice Chancellor, University of the West Indies  
 Dr Claude Packer, Mico Training College  
 Mr Gordon Siggers, Department for International Development, Jamaica office  
 Ms Margaret Sancho, USAID, Kingston  
 Mr Patrick Smith, Jamaica Teachers' Association  
 Minister Maxine Henry-Wilson, Minister of Education, Youth and Culture.

#### Botswana

Mr Hunyepa, Botswana Federation of Secondary School Teachers, Ministry of Education  
 Mrs Jones, formerly of the British Council Office, Gaborone  
 Mr Knox, British Council Office, Gaborone  
 Mr Makgothi, Head of Planning, Research and Statistics, Ministry of Education  
 Mr Motswakae, Director of Secondary Education, Ministry of Education  
 Mr Mpetsane, Chief Education Officer, South Central Region

Ms Nkwane, HIV/Aids Coordinator, Ministry of Education  
Mr Pheto, Teacher Service Management, Ministry of Education  
Mrs Sandford, formerly responsible for the Teachers for Botswana Recruitment Scheme, British Council, UK.

**England**

Mr Richard Beddell, Hounslow, LEA  
Mr Barry Brooks, Department for Education and Skills  
Mr Teddy Burton, Association of Jamaican Teachers in the UK  
Mr Brian Carter, National Union of Teachers  
Ms Jacqui Clarke, Association of Jamaican Teachers in the UK  
Ms Delores Cooper, High Commission of Jamaica  
Mr Roger Frost, Department for Education and Skills  
Mr Paul Jennings, Government of London Office  
Councillor Graham Lane, Newham LEA  
Dr Joanna Lemetais, Independent Consultant  
Ms Sarah Martin, Bexley LEA  
Mr Matthew Mitchell, Teacher Training Agency  
Dr Olwen McNamara, Sarah Lewis, John Howson, University of Manchester  
Mrs Jane Nellist, National Union of Teachers  
Ms Angela Nicholls, Recruitment and Employers Confederation  
Dr Kimberley Ochs, University of Oxford  
Ms Julie Shaw, Hammersmith and Fulham, LEA  
Mr Steve Sinnott, General Secretary, National Union of Teachers  
Ms Anna Tomlinson, League for the Exchange of Commonwealth Teachers  
Ms Vivienne Siva, Jamaican High Commission, London  
Mr Chris Waterman, CONFED  
Representatives of seven Teacher Recruitment Agencies.

**Paris**

Dr David Atchoarena, International Institute for Educational Planning, UNESCO  
Dr Phillip McKenzie, Organisation for Economic Cooperation and Development.

## Appendix 5

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### Examples of Questionnaires

- Teachers: Botswana
- Returned Teachers: South Africa
- Expatriate Teachers: England
- Principals: Jamaica
- Survey: South Africa
- Survey: England
- Trainee Teachers: Jamaica

**Teachers - Botswana**

**Name of School:** \_\_\_\_\_

The questionnaire is part of a research project by The University of Nottingham in the UK, in partnership with the University of Botswana and the Botswana Educational Research Association, to analyse the international migration of teachers. Your responses are anonymous and will feed into ongoing policy discussions within the Commonwealth aimed at enhancing education for all. Thank you for taking the time to participate.

**Section One. Personal Details**

1. What is your age? ..... Years

2. What is your sex?

Male [1]

Female [2]



3. What population group do you belong to?

Black [1] Chinese [2] Mixed [3] East Indian [4] White [5] other [6] Not Stated [7]








4. Are you married?

Yes [1]

No [2]



5. Do you have any children?

Yes [1]

No [2]



6. What is your country of birth?

7. What is your nationality?

**Section Two. Qualifications and Experience**

8. What is your current position?

Classroom

Senior

Deputy / H.O.D

Principal

Other (Please

Teacher [1]

Teacher [2]

Principal [3]

[4]

give title) [5]






9a. Do you specialise in teaching a particular subject?

Yes [1]

No [2]



**Go To Question 10**

9b. If yes, please identify your specialism:

Maths [2]	<input type="checkbox"/>	Religious Education [12]	<input type="checkbox"/>
English [3]	<input type="checkbox"/>	Physical Education [13]	<input type="checkbox"/>
Science [4]	<input type="checkbox"/>	Economics [14]	<input type="checkbox"/>
Humanities [5]	<input type="checkbox"/>	Other [15]	<input type="checkbox"/>
IT [6]	<input type="checkbox"/>	Moral Education [16]	<input type="checkbox"/>
Music/Drama [7]	<input type="checkbox"/>	Social Studies [17]	<input type="checkbox"/>
Art/Craft [8]	<input type="checkbox"/>		
Home Science [9]	<input type="checkbox"/>		
Design/Tech [10]	<input type="checkbox"/>		
Other Languages [11]	<input type="checkbox"/>		

10. How long have you worked as a teacher? ..... Years

11. Do you have any formal teaching qualifications?

Yes [1] No [2] **Go to Question 17**

12. If yes, what year did you qualify in? .....

13. How many years did the training course last? ..... Years

14. Where did you receive these teacher training qualifications?

*Home country [1]* *Other Country [2]*

15. Did you receive any government grants or scholarships to help fund this training?

Yes No

If so, please state the amount in US dollars or PULA

.....US Dollars ..... PULA

16. Did you receive a government loan to help fund this training?

Yes No

If so, please state:

a. The loan amount in US dollars or PULA

a ..... US Dollars b..... PULA

b. How much of this loan you have repaid? ..... US Dollars

17. Do you have any other post-school educational qualifications?

Undergraduate Degree [1]	Post-Grad Diploma [2]	Masters Degree [3]	Doctorate [4]	Other [5]	No [6]
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18a. Do you have another source of income?

Yes [1]

No [2] **Go to Question 19**



18b. If yes, please tick as appropriate.

Private tuition [1]

Part-time work outside of education [2]

Income from land or property [3]

Other (please specify [4])

### Section Three. Your Opinions

19. Do you think that your school suffers from a shortage of teachers?

Yes [1]

No [2] **Go to Question 22a**



20. To what extent is the shortage caused by teachers migrating overseas. Please rate its relevance to your school on the scale below:

Not at all

Minor

Partial

Major

Wholly






[1]

[2]

[3]

[4]

[5]

21. Has this shortage affected your teaching load?

Yes [1]

No [2]



22a. If you had the opportunity, would you be interested in teaching overseas?

Yes [1]

No [2] **Go to Question 23**



Please explain why you would like to work overseas

22b. If yes, have you ever actively looked for an opportunity to teach overseas?

Yes [1]

No [2]

23. There is currently a debate in the Commonwealth on the positive and negative aspects of international recruitment of teachers. What is your view on this?

If you have any further comments please write them below.

Thank you for participating in the research.

If you would like to follow the development of the project please visit our website:  
<http://www.nottingham.ac.uk/education/ccer/> and click on DfID Teacher Mobility

**Questionnaire for those Returned from Teaching Overseas – South Africa**

This questionnaire is part of a research project by The University of Nottingham, UK in partnership with the University of Kwa-Zulu Natal, to analyse international migration of teachers. Your responses are anonymous and will feed into ongoing policy discussions within the Commonwealth. Thank you for participating in the research.

**Section One. Personal Details**

1. What is your age? ..... Years
  
2. What is your sex?
 

Male [1]	Female [2]
<input type="checkbox"/>	<input type="checkbox"/>
  
3. What population group do you belong to?
 

African [1]	Coloured [2]	Indian [3]	White [4]	Other [5]
<input type="checkbox"/>				
  
4. Are you married?
 

Yes [1]	No [2]
<input type="checkbox"/>	<input type="checkbox"/>
  
5. Do you have any children?
 

Yes [1]	No [2]
<input type="checkbox"/>	<input type="checkbox"/>
  
6. What is your country of birth? .....
  
7. What is your nationality? .....

**Section Two. Qualifications and Experience**

8. When you returned from abroad, did you:
 

Continue working as a teacher [1]	<input type="checkbox"/>
Start work in other education related-field (e.g. education administration, lecturer) [2]	<input type="checkbox"/>
Start work as an employee outside of education [3]	<input type="checkbox"/>
Become self-employed [4]	<input type="checkbox"/>
Stop working (e.g. retired) [5]	<input type="checkbox"/>
  
9. How many years have you worked as a teacher? .....Years

*Answer either Question 10a OR Question 10b:*

10a. If you are currently working as a teacher, what is your position?

Classroom Teacher [1]	Senior Teacher [2]	Deputy Head [3]	Head Teacher [4]	Other (Please give title) [5]
<input type="checkbox"/>				

10b. If you are no longer working as a teacher, what was your position when you taught?

Classroom Teacher [1]	Senior Teacher [2]	Deputy Head [3]	Head Teacher [4]	Other (Please give title) [5]
<input type="checkbox"/>				

*Answer either Question 11a OR Question 11b*

11a. If you are still working as a teacher, what category of teacher best defines you?

Primary [1]	Secondary [2]	Special Needs [3]
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11b. If you are no longer working as a teacher please state what category of teacher you were?

Primary [1]	Secondary [2]	Special Needs [3]
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*Answer either Question 12a or Question 12b*

12a. When you worked in your home country were you employed as a teacher?

Yes [1]	No [2]
<input type="checkbox"/>	<input type="checkbox"/>

12b. If yes, was it a temporary or permanent position?

Temporary [1]	Permanent [2]
<input type="checkbox"/>	<input type="checkbox"/>

*Answer either Question 13a or Question 13b*

13a. Do you specialise in teaching a particular subject?

Yes [1]	No [2]
<input type="checkbox"/>	<input type="checkbox"/>

13b. If you are no longer a teacher, did you specialise in teaching a particular subject when you were a teacher?

Yes [1]	No [2]
<input type="checkbox"/>	<input type="checkbox"/>



### Section Three. Length of time abroad

21. Date of Departure  
M M Y Y Y Y  
— — — — — —

22. Date of Return  
M M Y Y Y Y  
— — — — — —

23. Which overseas countries have you worked in?

---

24. If you worked in the UK, which local education authority (LEA) did you work for? (If there was more than one, please list them in order of duration of service).

---

25. Why did you choose to work abroad? Please rank the top three in order of importance.

- |  |                                |
|--|--------------------------------|
| Higher salary [1]                              | <input type="checkbox"/>       |
| Opportunity for travel [2]                     | <input type="checkbox"/>       |
| Professional Development [3]                   | <input type="checkbox"/>       |
| Family/ friends overseas [4]                   | <input type="checkbox"/>       |
| Unemployment in country of origin [5]          | <input type="checkbox"/>       |
| Better working conditions [6]                  | <input type="checkbox"/>       |
| Safer environment (e.g. less crime) [7]        | <input type="checkbox"/>       |
| Better social services (health, education) [8] | <input type="checkbox"/>       |
| Other (please give details)[9]                 | <input type="checkbox"/> ..... |

### Section Four. Conditions of Employment Overseas

26. Which of the following entry requirements did you have?

- |                            |                          |
|----------------------------|--------------------------|
| Work Permit [1]            | <input type="checkbox"/> |
| Working Holiday Visa [2]   | <input type="checkbox"/> |
| Ancestral Visa [3]         | <input type="checkbox"/> |
| EU Passport [4]            | <input type="checkbox"/> |
| Spouse Entry Clearance [5] | <input type="checkbox"/> |

27. How were you recruited?

Recruitment Agency [1]

Local Education Authority [2]

Website [3]

Other [4]

Please give details.....

28. How would you rate the information you were given about the experience of teaching overseas before you left South Africa?

(1 = very good, 5 = very bad)

1

2

3

4

5

29. How would you rate the recruitment process in terms of its professional approach?

(1 = very good, 5 = very bad)

1

2

3

4

5

Please add any comments here:

### Section Five. Teaching Experience Overseas

30. Did you work as a Supply Teacher or in a Permanent Post or both?

Supply Teacher [1]

Permanent Post [2]

Both [3]




31. Were you employed as a qualified teacher (Teacher with Qualified Teacher Status, QTS) or as an unqualified teacher (instructor)?

Unqualified  
Teacher

Qualified  
Teacher

(Instructor) [1]

(with QTS) [2]

Both [3]




32. Did you receive an induction/training course before starting work?

Yes [1]

No [2] **GO to question 33**



32a. If yes, who provided it?

Recruitment Agency [1]

Local Education Authority [2]

Website [3]




Other [4]

Please give details.....

32b. Please rate the induction/training courses you received

(1 = very good, 5 = bad)

1

2

3

4

5






### Section Six. Professional Development

33. Did you gain Qualified Teacher Status (QTS) while overseas?

Yes [1]

No [2]



34. Did you undertake any professional development or training courses while you were working overseas?

Yes [1]

No [2] **Go to question 35**



41. What is your current monthly take-home pay?  
 .....Rand per month

### Section Eight. Plans for the Future

42. Do you plan to work overseas again?  
 Yes [1]                      No [2]                      possibly [3]  
                                           

42a. If yes, what is your preferred destination to work overseas? .....

43. Based on your experience, would you recommend teaching overseas to colleagues back in your home country?  
 Yes [1]                      No [2]  
                     

44. How would you describe your experience of teaching abroad?  
 (1 = very positive, 5= very negative)  
 1                      2                      3                      4                      5  
                                                                                       

45. Please elaborate on what made your experience positive or negative.

46. There is currently a debate in the Commonwealth on the positive and negative aspects of international recruitment of teachers. What is your view on this?

Thank you for participating in the research. If you would like to follow the development of the project please visit our website: <http://www.nottingham.ac.uk/education/ccer/> and click on DfID Teacher Mobility

### Overseas Teachers working in England

Name of School:

\_\_\_\_\_

The questionnaire is part of a research project by The University of Nottingham, UK to analyse international migration of teachers. Your responses are anonymous and will feed into ongoing policy discussions within the Commonwealth aimed at enhancing education for all. Thank you for taking the time to participate.

#### Section One. Personal Details

1. What is your age? ..... Years
  
2. What is your sex?  
 Male [1]      Female [2]
  
3. What population group do you belong to?  
 White [1]      Mixed Race [2]      Black [3]      Asian [4]      Chinese [5]      Other [6]
  
4. Are you married?  
 Yes [1]      No [2]
  
5. Do you have any children?  
 Yes [1]      No [2]
  
6. What is your country of birth? .....
  
7. What is your nationality? .....

#### Section Two. Qualifications and Experience

8. What is your current position?  

Teacher	Senior Teacher	Deputy/ H.O.D Head	Head Teacher	Other (Please give title)
<input type="checkbox"/>				
[1]	[2]	[3]	[4]	[5]
  
- 9a. Do you specialise in teaching a particular subject?  
 Yes [1]      No [2]

9b. If yes, please identify your main specialism:

- |                      |                          |                          |                          |
|----------------------|--------------------------|--------------------------|--------------------------|
| Maths [2]            | <input type="checkbox"/> | Religious Education [12] | <input type="checkbox"/> |
| English [3]          | <input type="checkbox"/> | Physical Education [13]  | <input type="checkbox"/> |
| Science [4]          | <input type="checkbox"/> | Economics [14]           | <input type="checkbox"/> |
| Humanities [5]       | <input type="checkbox"/> | Other [15]               | <input type="checkbox"/> |
| IT [6]               | <input type="checkbox"/> |                          |                          |
| Music/Drama [7]      | <input type="checkbox"/> |                          |                          |
| Art/Craft [8]        | <input type="checkbox"/> |                          |                          |
| Home Science [9]     | <input type="checkbox"/> |                          |                          |
| Design/Tech [10]     | <input type="checkbox"/> |                          |                          |
| Other Languages [11] | <input type="checkbox"/> |                          |                          |

10. How long have you worked as a teacher? ..... Years

11. Do you have any formal teaching qualifications?

- Yes [1]      No [2]  
       **Go to Question 17.**

If yes, what is your teaching qualification called (in full)? .....

12. If yes, what year did you qualify in?      Y Y Y Y  
 \_\_\_\_\_

13. How many years did the training course last? ..... Years

14. Where did you receive these teacher qualifications?

- Home country* [1]      *Other country* [2]

15. Did you receive any government grants or scholarships to help fund this training?

- Yes      No

If so, please state the amount in US dollars. .... US Dollars

16. Did you receive a government loan to help fund this training?

- Yes      No

If so, please state:

16a. The loan amount in US dollars ..... US Dollars

16b. How much of this loan you have repaid?..... US Dollars

17. Do you have any other post-school educational qualifications?

Undergraduate Degree	Post-Grad Diploma	Masters Degree	Doctorate	Other	No
<input type="checkbox"/>					
[1]	[2]	[3]	[4]	[5]	[6]

**Section Three. Working in a Foreign Country**

18. How many years did you work as a teacher before you came to England?

..... Years

19. In which other countries have you worked as a teacher (including your home country)?

.....

20. Why did you choose to work in England? **Please rank in order of importance.**

Higher salary .....	—
Opportunity for travel.....	—
Professional Development.....	—
Family/ friends overseas .....	—
Unemployment in country of origin .....	—
Better working conditions .....	—
Safer environment (crime, etc) .....	—
Better social services (health, education) .....	—
Other please give details) .....	—

21. Date of Arrival in England

M M	Y Y Y Y
— —	— — — —

22. Who recruited you to work in England?

Recruitment Agency [1]	Local Education [2]	School [3]
<input type="checkbox"/>	Authority <input type="checkbox"/>	<input type="checkbox"/>
Website [4]	Other (Please give details) [5]	
<input type="checkbox"/>	<input type="checkbox"/> .....	

23. Did you receive information from those who recruited you about the following before you arrived in England: (Please tick as appropriate)

	Yes [1]	No [2]
a) The school you will be teaching in	<input type="checkbox"/>	<input type="checkbox"/>
b) Accommodation	<input type="checkbox"/>	<input type="checkbox"/>
c) The cost of living	<input type="checkbox"/>	<input type="checkbox"/>
d) Salary level	<input type="checkbox"/>	<input type="checkbox"/>
e) Teaching Conditions	<input type="checkbox"/>	<input type="checkbox"/>

24. How would you rate the information you were given about the experience of teaching in England before arrival in the country?

(1 = very good, 5 = very bad)

1	2	3	4	5	N/A
<input type="checkbox"/>					

#### Section Four. Conditions of Employment

25. Which of the following entry requirements did you have?

Work Permit [1]	<input type="checkbox"/>
Working Holiday Visa [2]	<input type="checkbox"/>
Ancestral Visa [3]	<input type="checkbox"/>
EU Passport [4]	<input type="checkbox"/>
Spouse Entry Clearance [5]	<input type="checkbox"/>

26. Do you work, or have you worked, as a Supply Teacher, in a Permanent Post or both?

Supply Teacher	Permanent Post	Both
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
[1]	[2]	[3]

27. How long is your contract?

Less than 1Yr	1-2 Yrs	2-3Yrs	3-4Yrs
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
[1]	[2]	[3]	[4]

28a. Did you receive an orientation before starting work in a school in England?

Yes [1]	No [2]
<input type="checkbox"/>	<input type="checkbox"/> If No Go to Question 29

28b. If yes, who provided it? .....

28c. Please rate the orientation you received

(1 = very good, 5 = very bad)

1	2	3	4	5	N/A
<input type="checkbox"/>					

29. How would you describe your working relationships with colleagues in English schools?

(1 = very good, 5 = very bad)

1	2	3	4	5
<input type="checkbox"/>				

**Section Five. Professional Development**

29. Are you employed as a Teacher with Qualified Teacher Status?

Yes [1]

No [2]

If yes, go to Question 31a

30. Do you intend to gain Qualified Teacher Status?

Yes [1]

No [2]

31a. Have you undertaken any professional development since you have been working in England?

Yes [1]

No [2]

If No Go to Question 31

31b. If yes, who has paid for this professional development?

Yourself

Your School

Local Education Authority

Other (specify)

[1]

[2]

[3]

[4]

31c. Please rate the relevance of any professional development courses you have undertaken in England for your practice in your home country?

(1 = very relevant, 5 = not at all relevant)

1

2

3

4

5

**Section Six. Salary Levels**

(All questions refer to take-home pay, i.e. net of tax and other deductions, inclusive of any allowances and bonuses).

32. What was your monthly take-home pay before you left to come to work in England? Please convert to English Pounds using current exchange rate

..... Pounds per month

33. What was your monthly take-home pay when you started to work in England?

.....Pounds per month

34. What is your current monthly take-home pay? .....Pounds per month

35. What percentage of your current take-home pay goes towards?

- a) Meeting living costs and other expenses \_\_\_\_\_ %  
 b) Remittances to family or friends back home \_\_\_\_\_ %  
 c) Saving \_\_\_\_\_ %  
 d) Other \_\_\_\_\_ %

36a. Do you have another source of income?

Yes [1]                      No [2] If No **Go to Question 36**



36b. If yes, please tick as appropriate.

Private tuition [1]

Part-time work outside of education [2]

Income from land or property [3]

Other (please specify [4])

### Section Seven. Plans for the Future

37. Do you plan to return home at the end of this contract?

Yes [1]                      No [2]



**If yes, go to question 40.**

38. What do you intend to do after your contract expires:

Renew contract and continue teaching in same school [1]

Move to another school [2]

Find work outside of teaching [3]

Stop working (e.g. retire, attend domestic duties etc.) [4]

39. Do you intend to stay permanently in England?

Yes [1]                      No [2]



**If yes go to Section 8.**

40. How long do you plan to stay in England? ..... Years

41. What do you plan to do when you return to your home country after ending work in England?

Work as a teacher [1]

Work in other education related-field (e.g. education administration, lecturing) [2]

Work as employee outside of education [3]

Self-employed [4]

Not work (e.g. retire) [5]

### Section Eight. Your Views

42. Based on your experience, would you recommend teaching in England to colleagues back in your home country?

Yes [1]

No [2]

Please explain why

43. There is currently a debate in the Commonwealth on the positive and negative aspects of international recruitment of teachers. What is your view on this?

44. Do you have anything else you would like to tell us about your experience of coming to England to teach?

Thank you for participating in the research.

If you would like to follow the development of the project please visit our website:  
<http://www.nottingham.ac.uk/education/ccer/> and click on DfID Teacher Mobility

## Interview Schedule – Principals

Name of School.....

Address

.....

.....

Telephone .....

Have you received this survey? Have you completed it? Online, postal or phone. If no, fill in the survey before completing the questionnaire.

### Section One. History of the School

1. When was the school established? .....

2. To what degree is this school state funded?

Wholly state funded [1]

Partially state funded [2]

No state funding [3]

3. Under whose authority is the school run? (Give Details)

Government [1]

Charity / Trust [2]

Private Company [3]

Religious Body [4]

4. Is the school a rural or urban school? Rural [1]  Urban [2]

5. On a scale of 1-5, compared to other rural / urban schools how would you assess the poverty levels of the area that your school serves?

Much poorer than average	Poorer than average	Average poverty	Less poor than average	Much less poor than average
1	2	3	4	5

**Section Two. Management of the School**

6. What is the school admission policy?  
(Solicit opinion and then prompt)

Prompt:

- Test performance [1]
- Geography [2]
- First come, first served [3]
- Fees [4]
- Religious [5]
- Sex [6]
- Other [7]

7. What is the normal school fee (include all compulsory charges, if charges vary by year, report that for final year)? .....Jamaican %

8. What percentage of the students are exempted, receive a bursary or pay reduced fees?  
..... %

9. How would you rate the school performance in the school leaving exam when compared to the national average?

Bottom	Lower Middle	Middle	Upper Middle	Top
20%	20%	20%	20%	20%
<input type="checkbox"/>				
[1]	[2]	[3]	[4]	[5]

Name of school leaving exam..... Year when taken ... ..

10. Approximately what percentage of children drops out of school before the final year?  
.....%

11. What percentage of children has to repeat their final year?  
.....%

12. What percentage of children continues on to the next level of education? (primary to secondary, junior secondary to senior secondary, secondary to Uni/College)  
.....%

### Section Three. Staff

13. How many teaching staff (people who take classes) are currently employed in the school?

- a) Permanent ..... b) temporary .....  
 c) expatriate contract d) local contract

14. Of those teaching staff how many are:

- a) trained teachers -----  
 b) untrained teachers -----

15. Of the teaching staff who have left since 2000, how many have left due to these factors?

- Sickness [1]   
 Death [2]   
 Overseas Migration [3]   
 Move to another job in teaching [4]   
 Move to another job outside teaching [5]   
 Retirement [6]   
 Family/Childcare responsibilities [7]   
 Non-renewal of contract [8]   
 Other [9]

### Section Four. Staff Shortages

16. Do you have staff shortages currently? i.e. unfilled vacancies or posts being temporarily covered by others (teachers, assistants, etc) / supply teachers?

- Yes [1] No [2]



Please give details

17. Has your school experienced staff shortages in the past?

- Yes [1] No [2]

**If No, go to Question 23**

Please give details

18. In the case of most recent staff shortages, why were you not able to fill the posts? (solicit opinion and then prompt)

Reasons given:

Prompt:

- |                                 |                          |                   |
|---------------------------------|--------------------------|-------------------|
| Lack of Money [1]               | <input type="checkbox"/> | Go to Question 20 |
| Lack of Authorisation [2]       | <input type="checkbox"/> | Go to Question 20 |
| Lack of Suitable Candidates [3] | <input type="checkbox"/> | Go to Question 19 |
| Other [4]                       | <input type="checkbox"/> | Go to Question 20 |

19. Why do you think you had problems recruiting a suitable candidate for the post in this school?

Reasons given:

Prompt:

- |   |                          |
|---|--------------------------|
| Lack of resources in the school [1]           | <input type="checkbox"/> |
| Behavioural difficulties [2]                  | <input type="checkbox"/> |
| High local cost of living [3]                 | <input type="checkbox"/> |
| Isolation of the area [4]                     | <input type="checkbox"/> |
| Crime in the area [5]                         | <input type="checkbox"/> |
| Lack of qualified teachers in the subject [6] | <input type="checkbox"/> |

### Section Five. Impact of Shortage

20. Have the shortages you have experienced been in particular subject areas? If so, please list them.

21. How have you managed the teacher shortages in your school?  
(solicit opinion first and then prompt from list below)

Reasons given:

Prompt:

- |  |                          |
|--|--------------------------|
| Employing an expatriate teacher [1]                              | <input type="checkbox"/> |
| Increasing class sizes [2]                                       | <input type="checkbox"/> |
| Employing under/unqualified teachers [3]                         | <input type="checkbox"/> |
| Asking existing teachers to teach outside their subject area [4] | <input type="checkbox"/> |
| Dropped certain subjects from the curriculum [5]                 | <input type="checkbox"/> |
| Limited student enrolment [6]                                    | <input type="checkbox"/> |
| Other [7]  | <input type="checkbox"/> |

22. In your opinion, has teacher shortage had a negative impact on?

a) the number of students your school can enrol

Yes [1]                      No [2]

b) the quality of education provided

Yes [1]                      No [2]

If yes to either, please explain:

23. Please can you rate the following in order of priority in terms of their impact on the quality of education you can deliver at the school?

Lack of books/teaching material [1]	—
Difficult physical environment [2]	—
Insufficient number of teaching staff [3]	—
Insufficiently trained staff [4]	—
Other [5]	—

### Section Six. Staff Migration Overseas

24. To your knowledge have any of your staff migrated overseas since 2000.

Yes [1]                      No [2]  
                       **Go to Section Seven**

If yes, go to Table One, questions, 25 a – k

No.	Gender of Staff M [1] F [2]	When did they leave Year	What subject did they teach? (Subject Code)	What position did they hold within the school? (Staff Code)	Did they leave during the academic year? Y [1] N [2]	Did they work out their notice? Y [1] N [2]	Was it difficult to replace them? Y [1] N [2]	What country did they go to?	Effective on a scale of 1-5	View of parents, 1-4
1										
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										

**Subject Code:**

- 1. General Teacher
- 2. Maths
- 3. English
- 4. Science
- 5. Humanities
- 6. I.T.
- 7. Music and Drama
- 8. Arts and Craft
- 9. Home Science
- 10. Design and Technology
- 11. Other Languages
- 12. Religious Education
- 13. Physical Education
- 14. Commerce/Economics
- 15. Other
- 16. Moral Education
- 17. Social Studies

**Staff Code:**

- 1. Classroom/Assistant Teacher
- 2. Senior Teacher
- 3. Deputy Principal /Head of Department
- 4. Principal

**Parents Views**

- 1. Overall good
- 2. Overall bad
- 3. Overall Mixed
- 4. None

**Scale of Effectiveness – Teachers**

- 1 (less effective), 2 (slightly less effective)
- 3 (same as), 4 (slightly more effective)
- 5 (more effective)

26. How did the school cope with the departure of the teachers that went to work abroad?

27. In your most recent recruitment exercise, where did the teacher who replaced the migrant teacher work prior to accepting the position in your school?

- |   |                          |
|---|--------------------------|
| Unemployed [1]                            | <input type="checkbox"/> |
| Newly qualified [2]                       | <input type="checkbox"/> |
| Previously worked in a similar school [3] | <input type="checkbox"/> |
| Previously worked in a poorer school [4]  | <input type="checkbox"/> |

Comment:

28. How many suitably qualified candidates applied for the position?

29. Is it normally the case that you have a sufficient number of qualified candidates applying for posts in this school?

30. How would you rate the effectiveness of the teacher who replaced the migrant teacher on a scale of 1 – 5 (1 = less effective, 3 = same as, 5 = more effective)?

### Section Seven. Expatriate Teachers

31. Have you employed expatriate teachers?

Yes [1]

No [2]

Go to Section Eight

If yes, please tell us your view of overall experience

32. How did you recruit the expatriate teachers?

Provincial/National Office [1]

Recruitment agency [2]

Other (pleasespecify) [3]




33. How would you rate the recruitment experience?

(1=very good, 5=very bad)

1

2

3

4

5






Please tell us about it:

34. Did the expatriate teachers have any difficulties teaching the national curriculum?

35. Were there any language or communication issues?

36. Were there any other cultural differences in the teaching style of the expatriate teachers which caused difficulties in the classroom?

37. Have you had any feedback from parents about expatriate teachers?

(solicit opinion first and then prompt from list below)

Comments:

Prompt:

Overall good [1]

Overall bad [2]

Overall Mixed [3]

None [4]

38. How would you compare the overall teaching effectiveness of the expatriate teachers you have employed with your other teachers?

Less effective

1

Slight less effective

2

same as

3

slightly more effective

4

More effective

5

Give reasons:

39. In your experience, do teachers make any extra contribution (i.e. cultural) to the school because they come from other countries?

Yes [1]

No [2]

Give reasons:

### Section Eight. Returned Teachers

40. As far as you are aware, have you employed or do you currently employ any teachers who have migrated to work abroad as teachers and returned?

Yes [1]

No [2]

**Go to Question 43.**

Please give details (where they went, subject, position in school) (ask if you can be introduced to them to do the returned teachers questionnaire) **See additional section**

41. Was the fact they had worked abroad a positive factor / advantage when you were selecting candidates for the school?

Yes [1]

No [2]

Please explain:

42. Do you think these teachers make any extra contribution to your school as a result of their experience working abroad?

Yes [1]

No [2]

Give reasons:

43. There is currently a debate in the Commonwealth on the positive and negative aspects of international recruitment of teachers. What is your view on this?

44. Do you think there is a movement of teachers up the school system as positions become vacant in the top schools? The logical conclusion of this view is that it is the poorest or the most rural schools that suffer the worst shortages of teachers. Do you think this happens in Jamaica?

45. Is there anything else you would like to say generally about your school, the issue of education provision, and any difficulties you are facing?

### Survey of Teacher Mobility in South African Schools

Name of School.....  
 Address of School: .....  
 Telephone number of School: .....  
 Name of Head Teacher:  
 .....

All questions refer to the situation at the beginning of each academic year (i.e. January).  
 If the answer to any question is none, then write "0" (zero). If the answer is not known, write 'not known.'

	Start of Academic Year				
	2000	2001	2002	2003	2004
Q1: How many students were enrolled?					
Q2: How many teachers were employed at the start of the academic year? (Note those paid by the Department (D) and those paid by the School Governing Body (SGB).					
Q3: According to the official PPN, were there any unfilled vacancies for teachers? How many?					
Q4: Were any teachers from overseas? How many?					
Q5: Were any teachers South Africans who had taught overseas? How many?					
Q6: How many of the teachers joined the school in time for the start of the next academic year?					
Q7 How many teachers left the school before the start of the next academic year?					
Of the teachers who left the school:					
Q8a: How many had left to teach abroad?					
Q8b: How many had left due to ill health?					
Qu8c: How many had left due to death?					
Qu8d: How many had left due to non-renewal of their contract?					

### Short Survey of Staffing in English Schools

Name of School.....

Address.....

..... Postcode.....

1. How many teaching staff (people who take classes) are currently employed in the school?

.....

2. Do you have staff shortages currently? I.e. unfilled vacancies or posts being temporarily covered by others (teachers, assistants, etc) / supply teachers?

Yes                      No  
                     

If yes, how many? .....

3. Have you had any problems attracting a sufficient number of suitable applicants for vacant teaching posts since 2000?

Yes                      No  
                     

If yes, in which subject areas? .....

4. Would you say that the supply of suitably qualified candidates for teaching posts has improved, got worse or remained the same since 2000?

Improved              Got worse              Remained the Same  
                                           

5. To your knowledge have any of your British teachers migrated overseas since 2000?

Yes                      No  
                     

If yes, how many? .....

6. Do you currently employ any British teachers who have taught abroad?

Yes                      No  
                     

If yes, how many? .....

7. Do you currently employ any teaching staff from overseas? (including on a supply basis)?

Yes                      No  
                     

If yes, how many? .....

From which countries? .....

In what subject areas? .....

If no, have you ever employed any teaching staff from overseas since 2000 (inclusive)?

Yes                      No

8. Have you had any feedback from parents about overseas teachers? Overall was it:

Good	Bad	Mixed	None
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. How would you compare the overall teaching effectiveness of the overseas teachers you have employed with your other teachers? Are overseas teachers (please circle as appropriate)

Less effective	Slight less effective	same as	slightly more effective	More effective
-------------------	--------------------------	---------	----------------------------	-------------------

10. What percentage (roughly) of your pupils:

a) are entitled to free school meals? .....

b) speak English as a second language? .....

**THANK YOU FOR YOUR COOPERATION**

**Trainee Teachers (Jamaica)**

Name of Educational Institution .....

**Section One. Personal Details**

1. What is your age? ..... Years
  
2. What is your sex?
 

Male [1]	Female [2]
<input type="checkbox"/>	<input type="checkbox"/>
  
3. What population group do you belong to?
 

Black [1]	Chinese [2]	Mixed [3]	East Indian[4]	White[5]	Other [6]	Not Stated[7]
<input type="checkbox"/>						
  
4. Are you married?
 

Yes [1]	No [2]
<input type="checkbox"/>	<input type="checkbox"/>
  
5. Do you have any children?
 

Yes [1]	No [2]
<input type="checkbox"/>	<input type="checkbox"/>
  
6. What is your country of birth? .....
  
7. What is your nationality?

**Section Two. Training and Qualifications**

8. What type of teacher are you training to be?
 

Primary [1]	Secondary [2]	pecial Needs [3]
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
  
9. If you ticked yes to Secondary, please identify your subject specialism(s).
 

Maths [2]	<input type="checkbox"/>	Religious Education [12]	<input type="checkbox"/>
English [3]	<input type="checkbox"/>	Physical Education [13]	<input type="checkbox"/>
Science [4]	<input type="checkbox"/>	Economics [14]	<input type="checkbox"/>
Humanities [5]	<input type="checkbox"/>	Other [15]	<input type="checkbox"/>
IT [6]	<input type="checkbox"/>	Moral Education [16]	<input type="checkbox"/>
Music/Drama [7]	<input type="checkbox"/>	Social Studies [17]	<input type="checkbox"/>
Art/Craft [8]	<input type="checkbox"/>		
Home Science [9]	<input type="checkbox"/>		
Design/Tech [10]	<input type="checkbox"/>		
Other Languages [11]	<input type="checkbox"/>		

10. What is the name (in full) of the teacher training course you are currently taking?

.....

11. How many years does this course last? ..... Years

12. Did you receive any government grants or scholarships to help fund this training?

Yes [1]                      No [2]



If so, please state the amount: ..... US \$

13. Did you receive a government loan to help fund this training?

Yes [1]                      No [2]



If so, please state the loan amount ..... US\$

14. Aside from this course, do you have any other post-school educational qualifications?

Undergraduate    Hons            Masters [3]    Doctorate [4]    Other [5]    No [6]  
Degree [1]            Degree [2]







### Section Three. Plans for the Future

15. At the end of this course do you want to?

Teach in Jamaica [1]                      Teach abroad [2]                      Not enter teaching [3]




If you do not want to teach abroad, please go to Section Five.

If you do want to teach abroad, please answer the other questions in this section.

16. Why do you want to work overseas? Please rank the top three in order of importance.

- |  |                                |
|--|--------------------------------|
| Higher salary [1]                              | <input type="checkbox"/>       |
| Opportunity for travel [2]                     | <input type="checkbox"/>       |
| Professional Development [3]                   | <input type="checkbox"/>       |
| Family/ friends overseas [4]                   | <input type="checkbox"/>       |
| Unemployment in country of origin [5]          | <input type="checkbox"/>       |
| Better working conditions [6]                  | <input type="checkbox"/>       |
| Safer environment (e.g. less crime) [7]        | <input type="checkbox"/>       |
| Better social services (health, education) [8] | <input type="checkbox"/>       |
| Other (please give details) [9]                | <input type="checkbox"/> ..... |

17. What is your preferred destination?

Australia [1]    Canada [2]    New Zealand [3]    UK [4]    USA [5]    Other (specify) [7]  
                                                                                                     .....

18. Have you actively sought a position as a teacher overseas?

Yes [1]                    No [2]  
                   

19. Was the possibility of working overseas an incentive to train as a teacher?

Yes [1]                    No [2]  
                   

20a. Have you been recruited to work overseas?

Yes [1]                    No [2]  
                   

20b. If yes, please indicate in which country.....

If you have been recruited overseas please go to Section Four.

If not, please go to **Section Five**

**Section Four. Recruited Trainee Teachers**

21. Who recruited you to work as a teacher overseas?

Recruitment Agency [1]    Local Education Authority [2]    Website [3]    Other [4]  
                                                           

Please give details.....

22. Have you been recruited as a Supply Teacher or to a Specific School?

Supply Teacher [1]                    Specific School [2]  
                   

23. When were you recruited?                    M M                    Y Y Y Y  
 — —                    — — — — —

24. Which of the following entry requirements did you have?

- |                            |                          |
|----------------------------|--------------------------|
| Work Permit [1]            | <input type="checkbox"/> |
| Working Holiday Visa [2]   | <input type="checkbox"/> |
| Ancestral Visa [3]         | <input type="checkbox"/> |
| EU Passport [4]            | <input type="checkbox"/> |
| Spouse Entry Clearance [5] | <input type="checkbox"/> |

25. Do you intend to return to Jamaica after a period working abroad?

Yes [1] **Go to Qu26**      No [2] **Go to Qu 27**

26. How long do you plan to work overseas?

- |                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Less than 1 year         | 1-2 years                | 2-3 year                 | 3 -4 years               | 4+                       |
| <input type="checkbox"/> |
| [1]                      | [2]                      | [3]                      | [4]                      | [5]                      |

27. Has the body that recruited you provided information about the following?

- |                                    |                          |                          |
|------------------------------------|--------------------------|--------------------------|
|                                    | Yes [1]                  | No [2]                   |
| The school                         | <input type="checkbox"/> | <input type="checkbox"/> |
| Accommodation                      | <input type="checkbox"/> | <input type="checkbox"/> |
| The cost of living                 | <input type="checkbox"/> | <input type="checkbox"/> |
| Salary scales (Instructor and QTS) | <input type="checkbox"/> | <input type="checkbox"/> |
| The English National curriculum    | <input type="checkbox"/> | <input type="checkbox"/> |
| Induction programmes               | <input type="checkbox"/> | <input type="checkbox"/> |

#### Section Five. Any other comments

28. There is currently a debate in the Commonwealth on the positive and negative aspects of international recruitment of teachers. What is your view on this?

If you have anything further to add please do so in the space below.

**Thank you for taking part in this survey.**









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