TEACHER MOTIVATION AND INCENTIVES IN SUB-SAHARAN AFRICA AND ASIA

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EXCECUTIVE SUMMARY

This paper focuses on teacher motivation and incentives in low-income developing countries (LICs) in sub-Saharan Africa and Asia. In particular, it assesses the extent to which the material and psychological needs of teachers are being met. This includes overall levels of occupational status, job satisfaction, pay and benefits, recruitment and deployment, attrition, and absenteeism. Unfortunately, despite the importance and complexity of these issues, there is very limited good quality published information. Given the limited duration of this assignment (20 days), it was only possible to collect basic data on teacher pay and conditions of service. More research on teacher motivation and incentives is therefore urgently needed.

Occupational status

Occupational status depends on the 'public valuing' of the competence, role and overall contribution of a particular occupation to individual and societal welfare. Occupations that have attained 'professional status' share a common set of characteristics including a high level of education and training, a strong ideal of public service with an enforced professional code of conduct, and high levels of respect from the public at large. Teachers in most LICs are 'semi-professionals' mainly because of their relatively low levels of education and training vis-à-vis professional occupations such as doctors, engineers and lawyers; Also, the sheer size of the teaching force militates against 'professional' exclusivity. Teaching has become 'employment of the last resort' among university graduates and secondary school leavers in many countries. Consequently, teachers often lack a strong, long-term commitment to teaching as a vocation. Finally, teachers are paid considerably less than the mainstream professions.

It is widely argued that that the status of teachers in most countries, both developed and developing, has declined appreciably during recent decades. However, the forces that are resulting in the 'de-professionalisation' of teachers are probably more pronounced in LICs. These include protracted economic and social crisis in many LICs, increasing diversification of the teaching force with increasing reliance on less well-educated and qualified teachers with lower job security, generally lower standards of teaching, feminisation, and dramatic declines in declines in the standard of living of teachers.

Teacher motivation

Work motivation refers to the psychological processes that influence individual behaviour with respect to the attainment of workplace goals and tasks. The received wisdom among occupational psychologists is that 'pay on its own does not increase motivation'. However, pecuniary motives are likely to be dominant among teachers in those LICs where pay and other material benefits are too low for individual and household survival needs to be met.

Only when these basic needs have been met is it possible for 'higher-order' needs, which are the basis of true job satisfaction, to be realised.

There is a wide range of views about teacher motivation in Africa and South Asia, most of which are country specific. However, there appear to be mounting concerns that unacceptably high proportions of teachers working in public school systems in many LICs are poorly motivated due to a combination of low morale and job satisfaction, poor incentives, and inadequate controls and other behavioural sanctions. Consequently, standards of professional conduct and performance are low and falling in many LICs.

The excessive politicisation of public education has had a profound impact on levels of accountability in may education systems, which has, in turn, seriously affected teacher commitment and motivation. The poor and declining quality of public education has led to growing numbers of parents sending their children to non-state schools. In some countries, particularly in South Asia, this amounts to a mass exodus.

Incentives for schools and teachers in the public education system to perform well are frequently weak due to ineffective incentives and sanctions. Very low pay forces large proportions of teachers to earn secondary income from private tutoring and other activities. Poor human resource management also seriously de-motivates employees. Teacher management at the national and sub-national levels is nothing short of chaotic in many countries.

Where teachers pay large bribes to secure employment and desired postings, this may impact on job commitment and overall motivation. In these situations, teaching positions are little more than sinecures, which means that teachers do not feel accountable to school managements, parents or the wider community. Being posted to a rural school is likely to de-motivating for most teachers.

Increasing hours of work, larger class sizes, more subjects, and constantly changing curricula are cited as major de-motivators in many countries. What is expected from teachers (the 'social contract') is not pitched at a realistic level in many countries given material rewards, workloads, and work and living environments. In many countries, teachers are being asked to take on more responsibilities, including HIV/AIDS education, counselling, and community development.

The work and living environments for many teachers are poor, which tends to lower self-esteem and is generally de-motivating. Housing is a major issue for nearly all teachers. The 'struggling teacher' is an all too common sight, especially in primary schools. High proportions of teachers remain untrained in many LICs, which adversely affects 'can-do' motivation. Too often, teachers are 'thrown in at the deep end' with little or no induction. Multi-grade teaching is common in LICs, but most teachers are not adequately prepared for the special demands of this type of teaching.

Individual teacher characteristics can also adversely impact on motivation levels. In particular, the age profile of teachers has become younger in many countries due to the rapid expansion of primary and, more recently, secondary school enrolments and/or higher rates of teacher attrition.

Recruitment and deployment

The deployment of teachers, even in quite small national education systems, is very complex. For a variety of reasons, teaching positions are not being filled in an efficient and effective manner in most countries. Invariably, the key issue is the unattractiveness of rural schools, especially in remoter locations. Teacher resistance to being posted to rural schools coupled with endemic patrimonialism often results in high levels of bribery of education managers by teachers in order to ensure acceptable posting outcomes.

The main indicators of over- and under-staffing of teachers are 'disparities' in vacancy rates and pupil-teacher ratios as well as the age, gender, and qualification profiles of teachers in different locations and also between different types of schools. The weak correlation between school enrolments and the numbers of teachers employed in each school is the most obvious indicator of poor deployment.

The low proportion of qualified teachers working in rural schools is one of the most serious problems preventing the attainment of EFA with reasonable learning outcomes in most LICs. Women teachers at government-funded schools are also disproportionately employed in urban schools because it is generally accepted that they should not separated from their husbands/partners and there are pervasive cultural concerns about posting single female teachers away from their family homes.

The extent to which the recruitment process is centralised is a key factor in shaping deployment outcomes. Teacher recruitment is school-based in some countries, especially where missions and other faith-based education agencies own and manage sizeable proportions of schools. At the other extreme are highly centralised teacher recruitment systems where teachers are appointed by the Ministry of Education and then posted to schools.

The failure to provide attractive additional incentives to work in remoter rural schools is a key factor. Relatively very large incentives may be necessary to attract teachers to hard-to-staff schools, but these are not likely to be affordable in most LICs.

Despite the widespread recognition of what amounts to a teacher deployment crisis in many LICs, efforts to tackle the most serious deployment problems have been quite limited and invariably unsuccessful. Very few countries have EMIS systems that are sophisticated enough to be used for detailed recruitment and deployment purposes.

Teacher retention

There is very little information on staff retention in schooling systems in Africa and South Asia. There are five main types of teacher turnover: departures of teachers at the school level, movements of teachers between public and non-state schools, teacher upgrading, occupational attrition (teachers leaving the profession to take up other jobs), and international migration.

Teacher retention at the school level is a combination of attrition (through long-term illness and death, resignation, retirement, dismissal) and transfers (lateral, promotion, study leave). The main issue in most countries is the high rate of transfers of teachers between schools rather than attrition per se. A 'culture of discontinuity' often characterises teacher turnover in hard-to-staff schools in rural areas.

However, the lack of alternative employment opportunities keeps occupational attrition rates to 'greener pastures'' low in most countries[1]. This is especially the case for primary school teachers who do not have the education and qualifications to be particularly marketable in private sector labour markets. Anecdotal evidence suggests that occupational attrition among contractual and community teachers is higher than permanent teachers in some countries.

There is mounting concern about the migration of teachers from LICs to the United Kingdom and other OECD countries. It is argued that the 'brain drain' of teachers to the North is negatively impacting on teacher supply and retention in a growing number of developing countries, which is undermining the attainment of EFA. However, the available evidence shows that the overall impact on teacher supply in most LICs has been and is likely to remain minimal for the foreseeable future. The large majority of overseas teachers (both on work permits and working holiday visas) are from the 'old' Commonwealth countries, in particular Australia and South Africa and, to a lesser extent, New Zealand and Canada.

Teacher absenteeism

Poor motivation and lack of accountability is widely reported to result in high levels of teacher absenteeism in many LICs. Again, however, the evidence base is very weak. It is also difficult to measure teacher absenteeism that can be directly attributed to poor motivation and opportunistic behaviour.

Recent World Bank sponsored research reports generally high levels of teacher absence in African and Asian countries. However, most teacher absenteeism is for legitimate reasons, namely personal illness, official duty, and leave.

Absenteeism is widely reported to be much lower in private-for- profit schools, although there is little or no evidence to back this up. Non-state providers, and especially for-profit schools, are also more likely to impose sanctions on teachers who are absent for legitimate reasons. Teacher absenteeism is often reported to be worse in rural schools because teachers often go home at weekends and can be absent up to one day a week travelling to and from school. Absenteeism among multi-grade teachers is however noticeably higher than among ordinary class teachers.

One of the most important findings of the World Bank research is that absenteeism rates among contractual teachers are much higher than for teachers with permanent status.

Compensation

There has been no comprehensive, cross-country analysis of teachers' pay in LICs for well over a decade. What evidence is available suggests that teacher pay is generally very low and declining in real terms in most countries. Teachers in the large majority of LICs earn less than three dollars a day, which is usually the main source of household income. Given that most households have more than five people, household income per head is well under one dollar a day.

Salary supplementation for teachers by parents and communities is common throughout Africa. Primary schooling is supposed to be free in most countries but, given the plight of teachers and lack of learning materials, parents are frequently expected to pay various charges.

The overall structure of teachers' pay shares most of the pervasive characteristics of public sector pay systems in LICs. In particular, formal education and professional qualifications largely determine salary levels. The salary scales for both primary and secondary school teachers are often very flat with very small salary increments awarded on the basis of seniority/experience, with little or no link with actual job performance.

Non-formal, not-for-profit schooling, which is provided mainly by NGOs, generally employs teachers who have much lower education levels than government teachers and relatively little professional training. They are also locally recruited and usually work for only a few hours each school day. Thus, their pay is much lower than public sector payroll teachers. Teachers at private-for-profit schools also earn less, on average, than in the public sector.

Salary administration is also poor in most countries. In particular, late payment of salaries is very common.

Rural or remote area allowances are paid to teachers in many countries, but in general they are too small to have a major impact on teacher deployment.

Earning secondary income is central to the coping strategies adopted by teachers to meet minimum household subsistence needs. Private tuition amounts to a 'shadow' education system in many countries with very large proportions of pupils involved.

The extent of strikes and other industrial action among teachers in LICs is not fully recognised.

Community participation and decentralisation

It is widely believed that the comprehensive decentralisation of school management functions will result in significant improvements in teacher recruitment and deployment practices and higher teacher motivation and overall performance. This is because school managers and teachers become more accountable to parents and other local stakeholders and schools and/or communities have much greater direct control of teacher recruitment and deployment. Once again, however, there is a paucity of evidence, which can be drawn upon to assess these assertions in a robust manner.

The link between decentralisation and improved teacher performance is often quite weak in government schools. In part, this is because education decentralisation has, in practice, remained quite limited in many LICs (especially in much of South Asia). Furthermore, decentralisation can exacerbate political interference. The capacity of parents and local stakeholders to exercise control over school managers and teachers is another key factor.

Teachers and education for all

Discussions about EFA and improving the quality of education have generally failed to recognise the pivotal role of teachers. In particular, the key issues of teacher motivation and pay have been skimmed over and, at times, ignored altogether. Given the enormous financial implications of reversing the growing impoverishment of teachers in many LICs, it is perhaps not surprising that this problem has not been adequately acknowledged and addressed by both governments and donors.

Education reforms focus on improving teacher competence, the learning and working environments, and greater decentralisation, all of which can improve teacher motivation. But, many reform programmes also try to increase the workload of teachers and ignore or pay insufficient attention to pay and other conditions of service. In South Asia, the challenge of reforming public education systems is so large that increasing attention has been given to supporting parallel education provision and to shy away from staffing issues in government schools.

1. INTRODUCTION

This paper focuses on teacher motivation and incentives in low-income developing countries (LICs) in sub-Saharan Africa and Asia[2]. In order to assess the extent to which the material and psychological needs of teachers are being met, the following issues are discussed:

- What are the main determinants of the occupational and social status of teachers? Are there any significant trends in the overall status of teachers in LICs?

- What drives teachers to do their job well? What provides job satisfaction for teachers?

- What is the importance of pay levels in determining teacher motivation? What is known about teachers' reliance on secondary employment outside of the classroom?

- How effectively are teachers recruited and deployed to schools?

- How serious is teacher attrition at both the school, national and international levels? Are there any striking differences between the public and non-state sector?

- To what extent is poor motivation and opportunistic behaviour reflected in high and rising rates of teacher absenteeism in LICs? What are the main reasons for teacher absences from school?

- What is the impact of decentralised systems on teacher motivation, retention and absenteeism? What role can the community play?

- To what have these issues been identified as being critical for achieving UPE?

The evidence base

It is generally accepted that the competence and commitment of teachers should be the most important determinant of learning outcomes. What is striking though is just how little systematic research has been undertaken on motivational and incentives issues among teachers in LICs. There has not been a single article in any of the four leading international comparative education journals during the last ten years that has focused on teacher motivation and pay in any LIC in either Africa or Asia.[3] Nor has it been possible to locate any study that systematically tracks levels and determinants of teacher motivation, deployment and absenteeism over time in any LIC. In

[2] The Service Delivery Team at DFID commissioned this paper.
[3] Compare, International Journal of Educational Development, Comparative Education, and Comparative Education Review

short, therefore, the evidence base is very weak and urgent steps are needed to develop a comprehensive research programme in this area.

Another key finding of this review is that it is very difficult to make broad generalisations about teacher motivation and incentives. Nonetheless, there is a strong generalisation imperative in global discourses about education, which often leads to simplistic and quite mistaken conclusions and recommendations.

In addition to reviewing the available documentation, primary data on teachers' pay was collected from over 20 countries.[4] Teacher trade unions in all LICs in SSA and South Asia were also contacted, but the response rate was very poor.

[4] The assistance of the following individuals in furnishing information for this review is gratefully acknowledged: Hazel Bines, Peter Clarke, Peter Colenso, Bridget Crumpton, Martial Dembele, Bhim Devkota, Ron Fuller, Liv Norhoff Haraldsen, Baboucarr Jeng, Swathi Kappagantula, Henry Kaluba, Michael Kremer, Henry Lucas, Faustin Mukyanuzi, Moses Musikanga, Steve Passingham, Paramente Phamotse, Poul Rasmussen, Halsey Rogers, Pauline Rose, Alistair Ross, Amanda Sives, Robert Smith, Mercy Tembon, and Kate Wesson. Laure Beaufils made extensive comments on the first draft.

2. OCCUPATIONAL STATUS

Occupational status depends on the 'public valuing' of the competence, role and overall contribution of a particular occupation to individual and societal welfare. Occupations that have attained 'professional status' share the following characteristics:

- a high level of education and training based on a unique and specialised body of knowledge
- a strong ideal of public service with an enforced professional code of conduct and high levels of respect from the public at large
- registration and regulation by the profession itself
- trusted to act in the clients' best interests within a framework of accountability
- a supportive working environment
- similar levels of compensation as other professions.

2.1 TEACHERS IN DEVELOPING COUNTRIES

Regardless of development status, the teaching force in most countries has never enjoyed full professional status. However, the status of teachers as a 'semi-profession' is more evident in developing countries.

Education and training

A key feature of the teaching force in most LICs is its heterogeneity, particularly with respect to educational attainment and professional training. Teachers range from those with post-graduate qualifications to primary school leavers with minimal levels of pre-service training. In most primary schools in Africa, teachers with certificate level pre-service training predominate. Consequently, as an occupational group, teachers do not have the equivalent level of education and training nor the cohesiveness as well established professions, such as medical doctors, engineers and lawyers, which have uniformly high academic entry qualifications. Teachers are often only slightly better educated than their students. In primary schools in some African countries (e.g. Madagascar, Malawi), most teachers have only two years of secondary education.

Absolute and relative size

Teaching is a mass occupation, which also militates against 'professional' exclusivity. The teaching force accounts for one-half to two-thirds of public sector employment in most LICs. However, public sector recruitment freezes in many countries during the 1990s have seriously constrained the growth of the number of teachers in government or government-aided schools. The teaching force has expanded rapidly in only a relatively few countries (most notably Bangladesh, Malawi, Ethiopia, Eritrea, Mozambique and Uganda).

Self-regulation

The established professions enjoy a high degree of self-regulation and are successful in maintaining high barriers to entry in terms of qualification requirements and registration. Teachers, on the other, hand, tend to have weak, state-dominated professional organisations with several trade unions.

Public service ethos and professional conduct

Teaching has become 'employment of the last resort' among university graduates and secondary school leavers in many countries. Consequently, teachers often lack a strong, long-term commitment to teaching as a vocation. Around one-half of junior (Form 4) secondary school leavers in Malawi and Tanzania who finished school in 1990 were employed as teachers in 2001. The corresponding figure for Uganda is a staggering 81 per cent (se Al-Samarrai and Bennell, 2003).

The status and pay of primary school teachers compared to secondary school teachers is generally much lower in LICs than in the North. Thus, in the absence of alternative employment opportunities, becoming a secondary school teacher is the main avenue for social and economic advancement for the most able primary school teachers. This has important implications for the development of a critical mass of competent and experience teachers in primary education.

Client trust and accountability

Relatively, low levels of client trust and respect and inadequate levels of teacher accountability are key factors that have tended to lower the occupational status of teachers in many LICs. Parental views about teachers are, in fact, often quite contradictory and even paradoxical. Parents generally know very little about education and schooling, which, in the past, has probably enhanced the public perception of role of teachers. However, lack of understanding and unrealistic expectations has led to frustration and negative stereotyping of teachers. Often views of local schools which parents have had first hand knowledge of are far more positive than perceptions of schools and teachers as a whole.

The very high turnover of teachers in hard-to-staff schools also affects the community standing of teachers as whole. Teachers often come and go too quickly to be able to develop strong relationships with parents and the wider community. Teachers should play a leading role in the development of social capital in their local communities.

The work environment and remuneration

Teachers rarely enjoy the same work environment as other professions. The size of the teaching force coupled with lower educational qualifications means that teachers are also paid considerably less than the mainstream professions.

2.2. DE-PROFESSIONALISING TENDENCIES

It is widely argued that that the status of teachers in most countries, both developed and developing, has declined appreciably during recent decades. However, the forces that are resulting in the 'de-professionalisation' of teachers are probably more pronounced in LICs.

Education and economic crisis

Teacher status itself is an indirect measure of the health of a national educational system. Education in many LICs, especially in SSA, is viewed as being part and parcel of 'failing economies' and weak and failing states. The provision of education and training services has not therefore had the strong, positive symbiotic relationship with successful development, as in the newly industrialising countries in Asia where teachers continue to enjoy very high status. The link between education, employment and upward social mobility, which was strong during the 1950s and 1960s, has been seriously weakened as a result of protracted economic crisis.

Occupational diversification

'Emergency credentialing' of teachers, especially for low-income areas, and the speeding-up of pre-service training can also have a negative impact on teacher status. Certainly, in the OECD context, such short-term measures have worked against the development of a well-qualified teaching force. Teacher trade unions argue that diversification of the teaching force with less educated and minimally qualified entrants and much lower pay lowers the status of teachers as a whole and amounts to the 'casualisation' of the profession. However, where these teachers perform as well as or even better than permanent government teachers, it is the status of the latter group that has tended to suffer.

In Francophone Africa, governments with the support of the World Bank and other major donors have deliberately tried to lower the status of 'fonctionnaire' teachers, who are considered to be over-paid.

The emergence of a sizeable private education sector has further diversified the teaching force. However, private sector teachers are often seen in a more positive light by parents and the wider public because they are harder working and usually less well paid, but achieve better learning outcomes. Where private sector provision is growing rapidly with strong public approval, this is a strong countervailing force to the otherwise downward pressures on teacher

status. Highly variable standards of education provision within the private sector remains, however, a major problem almost everywhere.

Declining educational standards

Government teachers in some countries, most notably in South Asia, are largely blamed for falling educational standards and the wholesale 'failure' of public primary education. The overall status of government teachers has fallen as a consequence and there has been a mass exodus of both better off as well as poorer children to private schools. More generally, there are mounting public concerns about the growing proportion of teachers who are not 'fit to teach' even though relatively more teachers are professionally qualified in most countries. Teachers who are 'deadwood' (in terms of their competence and/or commitment) tend to have a disproportionate impact on public perceptions of the profession as a whole.

Education 'production function' studies have consistently found a low impact of teacher qualifications and experience on student attainment. These findings have fed into more general criticisms of teachers in LICs, which in turn has lowered their status, especially in the donor community where this kind of research is most influential. This is despite the fact that the modelling techniques used are very crude and almost all have very low explanatory power.

Feminisation

The feminisation of the teaching force is widely regarded as a key factor in lowering the occupational status of teachers in the North. As a general rule, the lower the level of schooling, the higher proportion of women teachers employed. Women still account for a minority of teachers in most public education systems in LICs, though there are some countries where their share has grown quite appreciably (especially where governments have introduced training and recruitment quotas for women).

Professional misconduct

It is widely argued that standards of professional conduct among teachers are declining in many LICs and, at least in part, this is due to declining status, morale and motivation. There is, however, usually little or no hard evidence to support these allegations of increasing work-related misconduct, such as higher numbers of dismissals and other types of punishment. Cases of teachers having sexual relationships with students and of even being 'sugar daddies' have been widely reported in the media in East and Southern Africa. The incidence of corrupt practices among teachers, in particular 'under the table' charges for educational services, are also believed to have increased in many countries.

Immiseration

The dramatic decline in the standard of living of teachers in many LICs has been a major factor contributing to their declining occupational status (see below).

3. TEACHER MOTIVATION

Work motivation refers to the psychological processes that influence individual behaviour with respect to the attainment of workplace goals and tasks. However, measuring the determinants and consequences of work motivation is complex because these psychological processes are not directly observable and there are numerous organisational and environmental obstacles that can affect goal attainment.

There are two key inter-related aspects of motivation - 'will-do' and 'can-do'. 'Will-do' motivation refers to the extent to which an individual has adopted the organisations goals and objectives. 'Can-do' motivation, on the other hand, focuses on the factors that influence the capacity of individuals to realise organisational goals. A teacher may be highly committed to the attainment of the school's learning goals, but she may lack the necessary competencies to teach effectively, which ultimately becomes de-moralising and de-motivating.

The received wisdom among occupational psychologists is that 'pay on its own does not increase motivation'. However, pecuniary motives are likely to be dominant among teachers in those LICs where pay and other material benefits are too low for individual and household survival needs to be met. *Only when these basic needs have been met is it possible for 'higher-order' needs, which are the basis of true job satisfaction, to be realised.* A key empirical issue is therefore to establish the extent of this problem (see below).

3.1 EVIDENCE

There is a wide range of views about teacher motivation in Africa and South Asia, most of which are country specific. However, there appear to be mounting concerns that *unacceptably high proportions of teachers working in public school systems in many LICs are poorly motivated due to a combination of low morale and job satisfaction, poor incentives, and inadequate controls and other behavioural sanctions*. For example, the 2000 EFA Country Assessment for Pakistan notes that poor teacher motivation is a 'colossal problem', which is seriously compounded by 'political interference'.

It is widely asserted that low teacher motivation is reflected in deteriorating standards of professional conduct, including serious misbehaviour (in and outside of work), and poor professional performance. Teacher absenteeism is unacceptably high and rising, time on task is low and falling, and teaching practices are characterised by limited effort with heavy reliance on traditional teacher-centred practices. Teachers are devoting less and less time to extra-curricular activities, teaching preparation, and marking. The 2004 World Development Report neatly summarises these concerns about teachers. 'Cases of malfeasance among teachers are distressingly present in many settings: teachers show up drunk, are physically abusive, or simply do nothing. This is not low-quality teaching - this is not teaching at all' (World Bank, 2004).

The fact remains that very little robust evidence is presented to support these views and assertions concerning teacher motivation in LICs. In the absence of adequate information, the incidence of poor teacher motivation and misbehaviour could well be seriously over-exaggerated mainly because of the pervasive negative stereotyping of teachers (especially by the media) in many countries. On the few occasions when teachers and school managers have been directly asked about teacher motivation, reported levels of morale have generally been quite high. As part of a study of the impact of the AIDS epidemic on education in Botswana, Malawi and Uganda, representative groups of primary and secondary school teachers were asked if they agreed with the statement that 'teacher morale at this school is high'. Morale in Botswana and Uganda was reasonably good whereas there appears to be more cause for concern in Malawi, especially at primary schools (see Bennell, Hyde and Swainson, 2002).

Another study on the impact of AIDS in Tanzania, Mozambique, Kenya and Uganda, noted that the 'morale among teachers is surprisingly high' (Carr-Hill et al, 2003). A recent survey in Ghana also concluded that teacher morale is 'reasonably high' (Acheampong et al, 2003). Only 13 per cent of teacher respondents indicated that they 'did not enjoy teaching' although nearly one-third stated that they did not intend to remain in the teaching profession. Conversely, over 80 percent of primary school teachers recently interviewed in Sierra Leone said they did not want to be teachers (ActionAid, 2003). Nonetheless, in a recent survey of primary schools in Sierra Leone, primary school head teachers indicated that, if they could, they would replace less than 20 percent of teachers because they are poorly motivated (see Bennell et al, 2004).

Teacher morale also varies noticeable across schools in the same locations. For example, in a small survey of secondary schools in Lusaka, Zambia, the breakdown of head teacher ratings of teacher morale was high 44 per cent, moderate/average 22 per cent and poor 33 per cent (see Bennell, Bulwani and Musikanga, 2003).

Research in OECD countries has consistently found that 'working with children' is the main determinant of teacher job satisfaction. It is the rewarding nature of the job rather than pecuniary gain that is the primary motivation for becoming a teacher. Teachers are most dissatisfied about work overload, poor pay, and low status.

3.2 SYSTEM AND OCCUPATIONAL FACTORS

The poor and declining quality of public education in many LICs has led to growing numbers of parents sending their children to non-state schools. In some countries, particularly in South Asia, this amounts to a mass exodus (see Bennell, 2003). Without the political 'voice' of the middle class, there is much less pressure on governments to improve public education. In Nepal, for example, it was only when Maoist insurgents forced the closure of private schools, that elite parents realised just how bad government primary and

secondary schools had become and begun to mobilise in order to improve the situation.

School and teacher accountability

It is widely noted that incentives for schools and teachers in the public education system to perform well are frequently weak due to ineffective incentives and sanctions. This is particularly the case when teachers cannot be effectively disciplined for unacceptable behaviour (absenteeism, lateness, poor teaching, abusive behaviour towards pupils) by school managements because it is very difficult to dismiss them and pay and promotion are largely unrelated to actual performance.

Where teacher pay is very low, there is normally de facto recognition that the 'labour process' in schools has to be organised in such a way that enables teachers the autonomy to generate additional income. Most managers also engage in these 'survival' activities. More generally, there is a widespread acceptance that 'you get what you pay for', which is not very much when pay does not meet minimum livelihood needs. Secondary employment activities are likely to both directly and indirectly lower the motivation of teachers in their main jobs.

Teacher management

Poor human resource management seriously de-motivates employees. Teacher management at the national and sub-national levels is nothing short of chaotic in many countries. In most of Africa, 'for almost all administration regarding teacher management, one notes a lack of clear rules which tend to generate conflict, power vacuum, and overlap and duplication of effort' (IIEP, 1999, p.35). Teacher supervision is frequently very weak, especially in countries such as India, where head teachers lack formal administrative control over teachers in their schools. There are invariably no effective performance appraisal and inspections are infrequent, especially in more remote schools.

Management styles tend to be authoritarian with limited participation, delegation, and communication with respect to major school management functions. Teachers subjected to these types of management regimes feel like 'we are treated as children'. The extent to which teacher grievances are addressed is also a key issue. The high turnover of head teachers in many countries is particularly disruptive and frequently bad for teacher morale. Many managers are 'acting' for very long periods.

Effective management training programmes for head teachers can however lead to noticeable improvements in teacher behaviour and performance (for example in Kenya and Botswana).

Teacher-state relationships

Relationships between teachers and governments are becoming increasingly strained in many countries. Teachers as a group have been targeted by governments and ruling parties in some countries (most notably in Zimbabwe). The leaders of teachers' unions have been imprisoned and even tortured (for example, in Burundi, Zimbabwe, and Ethiopia).

Occupational status and structure

As discussed earlier, the low and declining status of teachers in many LICs clearly impacts on overall levels of teacher motivation. Teaching is a challenging occupation, which means that teachers have to strive hard in order to meet learning goals. However, since teaching is invariably the occupation of the last resort among educated youth in LICs, the 'reluctant teacher' with limited long-term commitment to the profession is the norm.

Teacher labour markets are becoming increasingly segmented in most countries. The primary segment comprises of government-funded teachers who enjoy relatively high levels of job security and are often quite heavily unionised. A secondary segment is rapidly emerging in many LICs, which is characterised by teachers employed by non-state providers and contractual teachers in the public education sector. The latter group invariably have lower education and professional qualifications, are employed on short-term temporary contracts with much lower salaries, and are concentrated in rural locations.

Staffing patterns

Teachers in LICs are highly dispersed, typically in thousands of small schools and remote locations. In Madyha Pradesh, India, for example, one-third of schools have only a single teacher and only 20 per cent of schools have more than two teachers. Maintaining teacher morale in these work environments is a major challenge. Teachers often feel isolated with little or no collegiality and support. High staff turnover (both voluntary and involuntary) in hard-to-staff schools can adversely affect motivation. With very high vacancy rates in rural schools, teachers are often over-worked.

Where teachers pay large bribes to secure employment and desired postings, this may impact on job commitment and overall motivation. In these situations, teaching positions are little more than sinecures, which means that teachers do not feel accountable to school managements, parents or the wider community.

Multiple shifts are common in many countries, especially in urban schools. For example, one-third of primary teachers in Rwanda teach two shifts with an average class size of 61. Elsewhere, though, teachers who work a single shift in double and triple shift schools often only need to be at schools for three-four hours a day.

Being posted to a rural school is likely to de-motivating for most teachers.

Workload demands and expectations

The evidence on teacher workloads is particularly weak. Increasing hours of work, larger class sizes, more subjects, and constantly changing curricula are cited as major de-motivators in many countries. What is expected from teachers (the 'social contract') is not pitched at a realistic level in many countries given material rewards, workloads, and work and living environments. Large class sizes and heavy workloads in relation to pay (the effort-price of work) also make teachers resistant to the introduction of new teaching methodologies and other innovations.

The available indicators (especially pupil-teacher ratios) are too crude to draw robust conclusions. While PTRs are very high in many countries, they do not appear to have increased appreciably during the last 10-15 years in the majority of LICs. However, the introduction of free universal primary education in SSA has generally resulted in:

- Larger classes, especially in the lower grades, which tend to be taught by less experienced and poorly qualified teachers
- Increased financial pressures on schools, especially where they have not been fully compensated by governments for the loss of parental fee income
- More demanding school management
- Recruitment of less well-educated and qualified teachers
- Introduction of new and more demanding curricula,
- Increased demands for parental and community involvement in school management

In contrast, the teaching loads of secondary school teachers are frequently singled out as being too low. This is a highly contested issue in some countries (for example China, Uganda, Zambia). In Uganda, the Ministry of Education raised the teaching load of secondary school teachers to a minimum of 26 periods per week (out of a possible total of 40) in 2002. However, teachers protested to the President who reduced the number of periods to the original level of 18 per week. There are usually major differences in teacher workloads according to school size, type and location as well as subject areas. The most common reasons for low teaching loads are small schools, overcrowded curricula with too many specialised teachers, insufficient classrooms, and a predominance of single subject teachers. Secondary schools often have strong incentives to expand classes in order to maximise fee income. If, however, the financial payoff to teachers for teaching extra classes is not increased sufficiently then this can result in lower motivation.

In many countries, teachers are being asked to take on more responsibilities, including HIV/AIDS education, counselling, and community development.

Data are not readily available on the relative workloads of teachers at government and private schools. Often comparisons are not meaningful because private schools rely heavily on part-time teachers who are employed to teach a few lessons per week. They are only paid for the classes they teach so salary costs per class are generally much lower than in publicly funded schools. In some countries (for example Pakistan and India), overall PTRs are lower in government than private schools, which to a considerable extent is a reflection of the low level of demand for public education. But elsewhere, class sizes are generally smaller in private schools and both students and parents are more motivated, which makes teaching more rewarding and less stressful.

Work and living conditions

The work and living environment for many teachers is poor, which tends to lower self-esteem and is generally de-motivating. Schools in many countries lack basic amenities such as pipe-borne water and electricity, staff rooms, and toilets. Housing is a major issue for nearly all teachers. Again, though, time series data is urgently needed that can track changes in working and living conditions. For example, in Ghana, the percentage of teachers who are housed increased from only 5 percent in 1988 to 30 per cent in 2003.

Teacher competence

The 'struggling teacher' is an all too common sight, especially in primary schools. High proportions of teachers remain untrained in many LICs, which adversely affects 'can-do' motivation. Too often, teachers are 'thrown in at the deep end' with little or no induction. Multi-grade teaching is common in LICs, but most teachers are not adequately prepared for the special demands of this type of teaching.

Poor quality in-service training compounds poor pre-service training and induction in many countries. Teachers need continuous professional development (CPD) as well as support from peers and supervisors. CPD is usually scare, one-shot, top-down, unrelated to a broad strategy, and not targeted at teachers who need it most. In the absence of appropriate support, teachers can quickly lose motivation. There have however been some very effective interventions in this area. In Guinea, for example, teachers have been encouraged to take more responsibility for their own professional development, in particular by enabling them to access training resources through a competitive grant scheme.

Occupational health

Teachers living below or near national poverty lines are likely to suffer from high levels of illness. Teachers are also believed to be a 'high-risk' occupational group with respect to HIV infection. This is expected to have a major impact on teacher motivation in high prevalence HIV countries in Eastern and Southern Africa. Apart from the obvious impact of teachers who are living with AIDS, working with colleagues who are sick and who may

eventually die is also demoralising. The extra workload of covering from sick teachers is another key factor. But, conversely, there is some mainly anecdotal evidence to show that teachers 'come together' in the face of the AIDS threat and other adversities. In addition, the actual and potential impact of the epidemic on teachers tends to be quite seriously exaggerated (see Bennell, 2003).

3.3 INDIVIDUAL FACTORS

Individual teacher characteristics can also adversely impact on motivation levels. The age profile of teachers has become younger in many countries due to the rapid expansion of primary and, more recently, secondary school enrolments and/or higher rates of teacher attrition. This means that there are relatively few experienced teachers who can serve as mentors and provide professional support and leadership. Primary school teachers in SSA are usually considerably younger than secondary school teachers.

In most countries, government teachers are predominantly from higher socio-economic backgrounds and have been brought up in urban areas. Social distance is a particularly important in India where teachers are mainly from higher castes, but increasingly teach students from lower castes.

The impact on women teachers of being in a male-dominated profession is also likely to be a salient factor in some countries. Research has shown that motivational patterns are different among men and women in OECD countries with men more concerned with extrinsic rewards (most notably pay) and women focusing more on intrinsic rewards i.e. the satisfaction of teaching children.

4. RECRUITMENT AND DEPLOYMENT

The deployment of teachers, even in quite small national education systems, is very complex. For a variety of reasons, teaching positions are not being filled in an efficient and effective manner in most countries. Invariably, the key issue is the unattractiveness of rural schools, especially in remoter locations. Teacher resistance to working in these hard-to-staff schools reinforces urban-bias in resource allocations and overall education outcomes.

4.1 INDICATORS AND EVIDENCE

The main indicators of over- and under-staffing of teachers are 'disparities' in vacancy rates and pupil-teacher ratios as well as the age, gender, and qualification profiles of teachers in different locations and also between different types of schools. Some of these disparities are due to official staffing norms, which typically allocate relatively more teachers to smaller schools. However, most deployment problems are the result of the failure of education systems to ensure that teachers are assigned to schools according to laid down regulations and procedures.

Pupil-teacher ratios

The weak correlation between school enrolments and the numbers of teachers employed in each school is the most obvious indicator of poor deployment. Variations in pupil-teacher ratios between schools are typically very large in most countries. For example, in the mid-late 1990s, they ranged from 17 to 39 in Uganda, 30 to150 in Malawi, 19 to 56 in South Africa, and 19 to 48 in Botswana.

Teacher vacancy rates at the school and area level are more accurate indicators of deployment patterns. However, in the absence of this data in many countries, rural-urban differentials in pupil-teacher ratios are the most widely cited evidence of poor teacher deployment of teachers. But, these ratios have to be interpreted carefully. Class sizes in urban schools (especially secondary schools) are frequently much higher than in rural areas. In Pakistan, for example, urban and rural PTRs are 80 and 10 respectively. However, over-staffing of schools in urban areas is more evident elsewhere in South Asia[5]. The deployment of teachers to some remote areas is so problematic that schools have been closed down (for example, in Papua New Guinea).

Inefficient staffing norms are another major factor in many countries. For example, 56 per cent of lower primary schools in Karnataka, India have fewer than 60 pupils, but staffing norms stipulate that there should be a minimum of two and four teachers for lower and higher primary schools.

[5] In the mid-late 1990s, Madhya Pradesh, India 24 urban and 45 rural, Nepal 27 urban and 46 rural, and Sri Lanka 26 urban and 48 rural.

Qualification and experience profiles

The low proportion of qualified teachers working in rural schools is one of the most serious problems preventing the attainment of EFA with reasonable learning outcomes in most LICs. Rural-urban differences in the qualification profiles of teachers are usually very large. For example, in Namibia, 40 per cent of teachers in rural schools in the north are qualified compared to 92 per cent in the capital Windhoek and neighbouring areas. In Uganda, two-thirds of primary school teachers in urban schools are qualified, but only half in rural schools. The qualification divide is particularly acute in conflict and post-conflict situations. In Sierra Leone, for example, 96 per cent of teachers in the capital in Freetown are qualified, but less than 25 per cent in the remoter, war-torn northern districts.

Younger, inexperienced teachers tend to be posted to schools in rural areas in many LICs. In Nepal, for example, two-thirds of teachers are under 35 in rural schools, but only one-third at urban primary schools. Younger teachers tend to be single. Spouse separation can also seriously constrain deployment in some countries (for example, Botswana), especially where both partners have well-paid jobs.

Gender profiles

In most countries, women teachers at government-funded schools are disproportionately employed in urban schools because it is generally accepted that they should not separated from their husbands/partners and there are pervasive cultural concerns about posting single female teachers away from their family homes. For example, in Madhya Pradesh, 59 per cent of primary school teachers in urban schools are female, but only 13 per cent in rural schools. The local recruitment of women as Shiksha Karmi[6] teachers has circumvented this deployment constraint in some Indian states.

Some countries have attempted to overcome the paucity of female teachers in rural areas by introducing new staffing norms. For example, in Nepal, every primary school is expected to have one female teacher. However, this has not been enforced in many areas.

4.2 RECRUITMENT

The extent to which the recruitment process is centralised is a key factor in shaping deployment outcomes. Teacher recruitment is school-based in some countries, especially where missions and other faith-based education agencies (FBEAs) own and manage sizeable proportions of schools (for example, in Lesotho, Sierra Leone, and Uganda). In these situations where the FBEAs are the 'employing authority, teachers typically apply for vacant positions at individual schools and the Ministry of Education is merely informed once recruitment decisions have been made. Although recruitment is

[6] Shiksha Karmi are community-based schools, which are supervised by communities and local councils and receive funding mainly from the state. NGOs have been heavily involved in setting-up and managing many of these schools.

decentralised to the agency and school levels, there is often poor accountability. More serious still, without centralised posting of teachers, vacancy rates at hard-to-staff schools are typically very high.

At the other extreme are highly centralised teacher recruitment systems where teachers are appointed by the Ministry of Education and then posted to schools (for example, in Ghana). However, even where recruitment is centralised, some ministries have to consult with FBEAs (as the owners of the schools) over the appointment of staff, particularly head teachers. This further complicates principal-agent relationships in the recruitment and deployment process.

In some countries, a sizeable proportion of the teachers who are recruited do not meet laid down minimum entry requirements. Even in a relatively developed country such as Brazil, 'unclear lines of accountability have encouraged patronage relationships and recruitment of under-qualified teachers' (World Bank, 2001). In the worst cases, teaching positions are purchased. In India, government-assisted schools expect 'donations' from prospective staff. Teaching jobs in these schools are particularly attractive since teachers receive the same, relatively attractive salaries as government teachers.

Other common recruitment issues include the following:

- Public sector recruitment freezes in many countries have meant that large proportions of new teachers are recruited informally and are not put on the payroll. Even officially appointed teachers face long delays in getting on the payroll in many countries, which is very de-motivating.
- Enrolment figures are frequently inflated in order to maximise teacher recruitment and other resource allocations.
- Stop-start recruitment is common in many countries usually as result of poor planning. The underestimation of enrolments in rapidly urban areas is a common problem.
- It is often difficult to estimate how many teacher trainees will apply for teaching jobs because, in many countries, very sizeable proportions of trainees do not intend to pursue careers in teaching.

4.3 DEPLOYMENT PRACTICES

The main reasons for poor deployment are strong teacher resistance, pervasive opportunism and rent seeking behaviour by managers at all levels, and weak management systems.

Teacher resistance

Most teachers want to be posted to urban schools for both professional and personal reasons. The size of the rural-urban divide in most countries creates enormous disincentives to being posted to a rural school. Teachers want to remain in urban areas for a variety of reasons, most notably the availability of good schooling for their own children, employment opportunities for spouses

and other household members, the desire to maintain often close knit family and friendship networks, opportunities for further study, and poor working and living conditions in rural schools. The much greater opportunities for earning secondary incomes in urban locations is also a major factor. Finally, in many countries, newly appointed primary school teachers expect to upgrade their qualifications within three-four years so that they can become secondary school teachers or have a second chance of getting a place at university. Being posted to a rural primary school can, therefore, severely affect their ability to undertake further studies.

Teacher resistance to being posted to rural schools coupled with endemic patrimonialism often results in high levels of bribery of education managers by teachers in order to ensure acceptable posting outcomes. The less control teachers have over where they work, the greater the scope for rent-seeking activity of this kind.

A posting to a rural school can be a one-way ticket or for very long periods of time in some countries, especially where sizeable proportions of teachers pay for their postings. Because the deployment process is so manifestly corrupt in many countries, this merely heightens the sense of injustice felt by new teachers who are forced to work in rural schools.

The failure to provide attractive additional incentives to work in remoter rural schools is another key factor. Relatively very large incentives may be necessary to attract teachers to hard-to-staff schools, but these are not likely to be affordable in most LICs. A good number of middle and high-income developing countries have introduced effective staffing policies for ‘at risk areas’. These include better housing (Malaysia), housing credit (Colombia), local CPD programmes, recruitment and training (Uruguay). In New Zealand, teachers earn points based on hardship levels, which are an important determinant of re-assignments. In some countries, deepening fiscal crises have resulted in the removal of ‘remote area allowances’ (for example, in Sierra Leone).

Despite the widespread recognition of what amounts to a teacher deployment crisis in many LICs, efforts to tackle the most serious deployment problems have been quite limited and invariably unsuccessful. In Malawi, for example, a 1989 government directive instructed all teachers that they should teach in their own regions. However, this decision was unpopular that it had to be reversed.

There appear to be very few recent examples of countries that have effectively tackled teacher deployment problems in a comprehensive and sustainable manner. One of the most successful initiatives has been in Sri Lanka, where all teachers are expected to work 3-4 years in ‘difficult schools’ and a Teacher Deployment Project has successfully implemented a ‘staff equalisation plan’. This penalises provinces with excessive numbers of teachers and provides additional resources for provinces with teacher shortages.

Management capacity

Weak management and information systems are often cited as a major reason for the poor recruitment and deployment of teachers. Very few countries have operational human resource development plans for the education sector, which means that neither the national demand for teachers nor the expected supply of trained teachers is accurately known. There is also often limited coordination between departments of planning in Ministries of Education, which are responsible for determining teacher requirements, and departments of teacher training and development who establish actual student intakes to teacher training courses at colleges and universities.

Very few countries have EMIS systems that are sophisticated enough to be used for detailed recruitment and deployment purposes. What information is collected also tends to be inaccurate mainly because it is based on head teacher self-reporting. There are often strong incentives to provide incorrect information.

5. TEACHER RETENTION

There is very little information on staff retention in schooling systems in Africa and South Asia. This includes basic data on the main characteristics and trends in teacher retention (age, gender, experience, qualification, school location, school ownership, subject, type of staff (managers and teachers), employment status, type of teaching, and the overall economic and political situation).

There are five main types of teacher turnover: departures of teachers at the school level, movements of teachers between public and non-state schools, teacher upgrading (in particular primary school teachers moving to jobs in secondary schools), occupational attrition (teachers leaving the profession to take up other jobs), and international migration. Teacher transfers between primary and secondary school are high in some countries, especially where there has been a rapid expansion of secondary school enrolments.

Teacher attrition is either voluntary (resignation, early retirement) or involuntary (death, illness, compulsory retirement age, dismissal). Similarly, transfers can be either voluntary or involuntary.

5.1 SCHOOL RETENTION

Teacher retention at the school level is a combination of attrition (through long-term illness and death, resignation, retirement, dismissal) and transfers (lateral, promotion, study leave). The main issue in most countries is the high rate of transfers of teachers between schools rather than attrition per se. A 'culture of discontinuity' often characterises teacher turnover in hard-to-staff schools in rural areas. For example, a survey of rural primary schools in Malawi in October 1999 found that nearly 25 per cent of teachers had left their schools since the start of the academic year in January (see IEC, 1999)[7]. In contrast, teacher turnover in urban schools is generally much lower.

Even in high HIV prevalence countries, staff turnover due to study leave and school transfers is usually much higher than attrition (from all causes including death) and creates therefore the largest problems for school and system-level managers (see Bennell et al, 2002). Study leave in order to upgrade professional teaching qualifications is the major avenue for career advancement in many countries. It can reach very high levels (for example, in Zambia and Botswana). One in eight primary school teachers in Sierra Leone were on three-year study leave in early 2004.

Concerns have also been expressed about the relatively low proportions of upgraded primary school teachers who continue to work in primary schools. In Tanzania, for example, only one-half of primary school teachers who upgraded their qualifications during the 1990s returned to primary school teaching. Bonding arrangements of various kinds are the usual recommended

[7] Another 25 per cent had changed classes in their schools.

response to counter this problem, but there is little information about their effectiveness.

In some countries teacher turnover rates at the school level are dysfunctionally low. For example, in Nepal, these rates were 3.4 per cent in primary schools, 2.2 per cent in lower secondary schools, and 1.5 per cent in secondary schools in 2001. Many teachers have paid for their posts so do not expect to be moved from their preferred locations. But the high level of politicisation means that there are constant changes of district and regional managers with new governments.

5.2 OCCUPATIONAL ATTRITION

Lack of alternative employment opportunities keeps attrition rates to 'greener pastures'' low in most countries[8]. This is especially the case for primary school teachers who do not have the education and qualifications to be particularly marketable in private sector labour markets. For example, resignation rates were less than two per cent in Botswana and Zambia in the late 1990s-early 2000s. A tracer survey of university graduates with education degrees who left national universities in three African countries between 1980 and 1999 found that high percentages were still working in the education sector in 2001 (Malawi 70 per cent, Tanzania 80 per cent, and Uganda 90 per cent), but that very few were classroom teachers.

Occupational attrition poses a greater threat in countries with high economic growth rates and rapidly expanding employment opportunities, particularly in the private sector. But, generally speaking, these countries (particularly the tiger economies of South East Asia) also have the fiscal capacity to ensure that teachers' salaries remain reasonably competitive and thus they have not experienced high levels of attrition. Teacher retention rates tend to be much lower in fast expanding OECD countries. In England, for example, 40 per cent of teachers leave the profession within five years of the start of their careers.

Anecdotal evidence suggests that occupational attrition among contractual and community teachers is higher than permanent teachers in some countries (for example Cameroon).

5.3 INTERNATIONAL MIGRATION

There is mounting concern about the migration of teachers from LICs to the United Kingdom and other OECD countries. It is argued that the 'brain drain' of teachers to the North is negatively impacting on teacher supply and retention in a growing number of developing countries, which is undermining the attainment of EFA.

This issue was discussed at the October 2003 Commonwealth Ministers of Education Conference. A working party has been established, which has been mandated to make appropriate recommendation that 'find a balance between

the rights of individuals and the free movement of labour and well being of individual teachers and source countries'. Some governments are seeking financial compensation for the loss of teachers overseas.

To date, no detailed empirical studies have been undertaken on teacher migration of any kind. A relatively large DFID-funded research project is currently focusing on teacher migration from two source countries (Jamaica and South Africa)[9] and two recipient countries (Botswana and United Kingdom).

Overseas teachers in the UK

Two types of working arrangements exist for overseas teachers in the UK. First, teachers can be granted a work permit for five years with the right to apply for permanent settlement after four years. The work permit system is demand-driven and there are no fixed quotas. And secondly, teachers from the Commonwealth who are on extended holidays to the UK and are under 28 years old, single and have no dependants can obtain 'working holiday' visas[10]. Since the work has to be 'incidental' to the main purpose of the visit to the UK, all employment has to be temporary in nature, which in the case of the education sector means short-term 'supply' teaching.

The employment of overseas teachers has been driven by domestic shortages of British teachers. These became acute in the late 1990s and local education authorities, especially in London and other inner city areas, turned to specialist overseas teacher employment agencies to fill vacancies. Shortages became so critical that employment rules for overseas teachers were eased appreciably in 2001.

Despite the mounting political and related media concern about overseas teachers, the overall impact on teacher supply in most LICs has been and is likely to remain minimal for the foreseeable future. There are four main reasons for this.

- The supply of teachers in the UK has increased by over 50 per cent since the late 1990s[11] with the result that, by 2003, the demand for overseas teachers began to fall significantly (see Table 1). With an overall teacher vacancy rate of only one percent in late 2003, recently recruited overseas teachers are facing major difficulties in finding work. The Teacher Pay Review has also targeted money at areas with particular recruitment difficulties. Teachers accounted for only 7 percent of the total work permits in 2000. The breakdown for other sectors was a follows (health 24 percent, IT 16 percent, managers and administration 21 percent, and engineering and related occupations 10 percent).

[9] Neither of these two countries are LICs

[10] Individuals must also have sufficient funds for return airfares home and to provide support for initial stay in the UK (£2000).

[11] Both newly trained and experienced teachers who have been encouraged to resume their teaching careers.

- The large majority of overseas teachers (both on work permits and working holiday visas) are from the 'old' Commonwealth countries, in particular Australia and South Africa and, to a lesser extent, New Zealand and Canada. The other main source countries are in the Caribbean, most of which continue to use British 'O' and 'A' level qualifications. The number of teachers from 'new' Commonwealth

Table 1: UK approved work permits for teachers, 2001-2003

COUNTRY	2001	2002	2003	TOTAL
South Africa	2010	2542	1492	6044
Australia	1011	1528	1299	3838
New Zealand	609	887	669	2165
Jamaica	381	530	523	1434
Canada	348	513	479	1340
Zimbabwe	194	325	268	787
India	130	317	174	621
Ghana	53	123	126	302
Kenya	39	77	116	232
Nigeria	60	90	65	215
Trinidad & Tobago	43	50	44	137
Pakistan	22	43	49	114
Mauritius	19	45	47	111
Uganda	16	22	21	59
Zambia	16	22	16	54
Malaysia	16	17	33	66
Guyana	8	21	30	59
Sri Lanka	10	16	15	41
Barbados	15	9	8	32
Singapore	9	10	19	38
Cameroon	10	5	15	30
St Lucia	5	10	1	16
Namibia	8	6	8	22
Malawi	3	10	4	17
Malta	5	8	6	19
Seychelles	2	10	8	20
Sierra Leone	4	8	3	15
Cyprus	7	3	2	12
St. Vincent	2	5	6	13
Bangladesh	1	3	7	11
Tanzania	3	1	2	6
Swaziland	0	3	2	5
Antigua	1	1	0	2
Botswana	0	1	6	7
PNG	1	0	0	1
Samoa	1	0	0	1
St. Kitts	1	0	1	2
Vanuatu	1	0	0	1
TOTAL	**5064**	**7261**	**5564**	**17889**

Source: Work Permits (UK)

countries in Africa and South Asia remain minimal, both in absolute and relative terms[12]. The political and economic crisis in Zimbabwe, which, historically, has one of the most well developed educational systems in SSA, has resulted in quite a sizeable outflow of teachers. But this should be considered as a special case. Small states with well-educated teaching forces are most vulnerable to teacher brain drain, although in many of these countries teachers are paid relatively well.

- Most primary school teachers in LICs do not have the necessary educational background and professional teaching qualifications to be eligible for employment in the UK (or in other OECD countries). Figures are not available, but it is probably the case that the majority of migrants from the Caribbean and South Africa are secondary school teachers.

- To date, teacher migration to the UK has been largely circulatory in nature. A large proportion of overseas teachers find it difficult to cope with the schooling culture and general working environment, especially in inner city schools and return home, usually after a few years. Most overseas teachers are also employed as unqualified teachers (with therefore appreciably lower incomes) and have to re-qualify in order to attain 'qualified teacher status'. This is a major deterrent for most teachers.

Other international and regional migration

Teacher migration from the Caribbean to Canada and the United States has been substantial for over two decades, especially from Guyana and Jamaica. The New York City Board of Education recruited 600 teachers from Jamaica in 2001. Small numbers of teachers from India have also found employment in schools in the US. European countries have not generally faced serious teacher shortages and language prevents most teachers from English-speaking countries working in these countries.

Botswana and South Africa have employed large numbers of teachers from elsewhere in the continent, especially from Zambia, Zimbabwe, and Ghana. However, Botswana is now only recruiting small numbers of expatriate maths and technology teachers for secondary schools and the numbers of teacher migrants to South Africa has fallen appreciably since the mid-1990s. Less than 0.25 per cent of secondary school teachers in Zambia resigned in 2002 to take up appointments overseas.

[12] i.e. to the overall national teaching force.

6. TEACHER ABSENTEEISM

Poor motivation and lack of accountability is widely reported to result in high levels of teacher absenteeism in many LICs. The World Bank, in particular, in its 2004 World Development Report, highlights poor teacher attendance as a direct consequence of the lack of accountability of teachers and schools to parents and local communities. To date, however, the paucity of comprehensive cross-country data has made it virtually impossible to reach robust conclusions. Fortunately, the evidence base is improving. The World Bank (with DFID funding) has recently conducted national absence surveys (WBNAS) of teaching and health personnel in seven developing countries (Bangladesh, India, Indonesia, Ethiopia, Uganda, Ecuador and Peru) during 2003.[13] As will be discussed below, the findings to date from this research present quite a mixed picture.

6.1 METHODOLOGICAL ISSUES

On its own, the overall level of teacher absenteeism is a poor proxy for teacher accountability and management oversight. This is because, for a number of reasons, it is difficult to measure teacher absenteeism that can be directly attributed to poor motivation and opportunistic behaviour. The level of non-legitimate teacher absence is determined by a combination of two distinct sets of factors - teacher motivation and management sanctions/punishments. Disentangling these two is not easy. Teachers may, for example, be seriously de-motivated, but an effective system of management controls can ensure that absenteeism remains low. The deduction of pay for unaccounted absences is an obvious deterrent, which can be effective in keeping teacher absenteeism to low levels (for example, in South Africa). However, pay systems are too crude and rudimentary to do this in many LICs.

Another major challenge is being able to verify accurately the reasons given by school managers and teachers for teacher absences. In particular, not all teacher illness is likely to be genuine. Only when there are no or very weak sanctions for being absent, will teachers not give some legitimate reason for their absence. Furthermore, not all teacher absence is bad. Teachers are required or can opt to attend in-service training courses and actively participate in community activities (both school and non-school related). Thus, the incidence of off-site in-service training is likely to be positively correlated with well-managed schools and higher teacher morale. Good school management also requires head teachers and other senior teachers to attend meetings outside the school which, given the distances involved, can entail frequent overnight stays.

[13] Another teacher absence study has also been undertaken by Bank researchers in Zambia (see Habyiramana et al, 2003).

6.2 MAGNITUDE AND TRENDS

Africa: The WBNAS report very high levels of teacher absence in two African countries – Kenya 28.4 per cent and Uganda 27.0 per cent[14]. In addition, the 2004 World Development Report cites a study that shows that up to 45 per cent of teachers in Ethiopia were absent during the previous week, with 10 per cent of teachers absent for more than three days (World Bank, 2004). However, the limited amount of other evidence suggests considerably lower rates of absenteeism. Personal visits by the author to schools and training institutions in Botswana, Sierra Leone, Tanzania, Uganda, and Zambia during the last two years do not suggest that teacher absenteeism is a major issue. Absenteeism rates at representative although small samples of primary and secondary schools in Botswana, Malawi and Uganda were generally under 5 per cent in 2000 (see Bennell, Hyde and Swainson, 2002).

Asia: In India, the PROBE survey in 1999 found that there was no teaching activity in one half of the schools visited. In Pakistan, between 10-20 per cent of schools are reported to be 'empty or nearly so'. The WBNAS national absence rates for Bangladesh are 14.9 per cent, India 24.6 per cent, and Indonesia 19.0 per cent. However, sub-national variations are very large in all three countries (see Table 2). Surprisingly, no explanations are offered for these variations. Why for example is teacher absenteeism 40 per cent in Delhi, but only 15 per cent in Gujarat? These large differences in absenteeism rates are likely to reflect differences in policies and practices in what are relatively decentralised state education systems.

Table 2: State/regional variations in primary school teacher absenteeism rates (percentages)

Country	Lowest	Median	Highest
Bangladesh	10.3	15.5	18.5
India	15	24	40
Indonesia	7.4	18.1	33.5
Ecuador	3.6	14.1	15.9
Peru	7	13.2	16.2

Source: WBNAS

Reported teacher absenteeism rates in other Asian countries tend to be lower, although the estimates are now quite dated – Sri Lanka 11 per cent (1995), Nepal 14 per cent (mid 1990s), and Pakistan 10 per cent (1993). In Nepal, 'many teachers regularly desert their classrooms to do party business'.

South and Central America: The WBNAS report absenteeism rates of 13.5 per cent in Ecuador and 10.6 per cent in Peru in 2003.

Generally speaking, absenteeism among teachers in the WBNAS countries is much lower than among medical personnel in the same locations.

[14] The Ethiopia and Uganda reports were still not available at the time of writing. The Kenya figure comes from Glewwe et al, who in fact report teacher absenteeism at 20.0 per cent.

Trends

There is virtually no information on trends in teacher absenteeism in LICs. However, it is commonly stated that absenteeism rates are increasing in many countries, especially in the high HIV prevalence countries in Eastern and Southern Africa. But, more generally, declining teacher morale and motivation could be a key factor.

In studies on the impact of HIV/AIDS in Botswana, Malawi and Uganda, most pupil and teacher respondents did not believe that absenteeism was either a major problem or was getting worse. The provision of anti-retroviral drugs to teachers has kept morbidity and mortality rates well under expected levels in the worst affected country, namely Botswana. In Uganda, teacher mortality rates had already peaked in the mid-late 1990s.

In Sierra Leone, absenteeism has improved considerably since the end of the war in 2001 (from around 20 per cent in 2002 to less than 10 per cent in early 2004). However, in Ghana, teacher absenteeism appears to have increased. For the entire year in 1988, only 4 per cent of teachers were absent for non-illness reasons compared to 13 per cent in one month alone in early 2003 (Acheampong et al, 2003).

6.3 DURATION AND IMPACT

Absenteeism patterns among teachers are crucial. Good quality data is needed of the proportions of teachers who are rarely absent, occasionally absent, and frequently absent over a specified time period (ideally the entire school year, but at least one month). The WBNAS did not collect information on the number of days teachers had been absent on the day of the survey. This is unfortunate because longer periods away from school tend to be more disruptive and thus have a more negative impact on learning outcomes.

It is also important to ascertain absenteeism levels and patterns among head teachers and other teachers with substantive management functions. Regular attendance by school managers is key in establishing a strong attendance culture. Head teachers may abuse their positions and absent themselves on a regular basis. However, no evidence is available on school manager absenteeism.

The impact of teacher absenteeism will depend on many factors, including how the school deals with teacher absence, the extent of over-staffing, class sizes, and the availability of replacement (supply) teachers, especially for longer absences. In Africa, classes are usually doubled-up when a teacher is absent.

6.4 REASONS FOR ABSENCE

Table 3 shows that most teacher absenteeism is for legitimate reasons, namely personal illness, official duty, and leave. Only in Ecuador and Peru,

where overall absenteeism is low, is a significant proportion of leave unaccounted for and thus likely to be non-legitimate and non-authorised.

Table 3: Reasons for primary school teacher absence (percentage breakdown)

		Sickness of self	Sickness others	Official duty	Leave	Funerals	At school-left	Unauthorised	No reason given/ not known
Bangladesh	All	10	na	55	33	na	2	2	0
Indonesia	All	13	na	19	24	na	13	3	25
Ecuador	All	13	na	25	10	na	10	2	41
Peru	All	9	na	12	12	na	5	10	42
Botswana	Female	42	18	15	0	18	na	na	8
	Male	35	14	15	0	14	na	na	20
Malawi	Female	42	20	2	0	31	na	na	4
	Male	38	11	5	0	47	na	na	0
Uganda	Female	29	10	29	0	24	na	na	5
	Male	33	0	42	0	17	na	na	8

Source: World Bank Teacher Absence Studies and Bennell, Hyde and Swainson, 2002

Sickness

Teachers who are living on or near the poverty line are likely to be frequently ill. More research is needed on the illness profiles of teachers. Some sickness-related absence is also due to teachers (especially females) having to look after sick household members.

Official duty

Official duty is the most important reason for teacher absenteeism in Bangladesh, Ecuador, and Uganda. Data for India is not available but, as in Bangladesh, teachers are frequently absent from school in order to undertake official duties expected of all government officials, including census enumeration and election monitoring. Head teachers in all countries also frequently attend official meetings and other duties outside of school. These absences tend to be longer the more remote the school.

As noted earlier, very large numbers of teachers are on full-time study leave in many countries, but continue to be on the payroll and are counted as though they are still 'in class'. Teacher qualification upgrading programmes can involve regular absences from school in order to attend evening classes and supported distance learning.

Personal leave

Except for compassionate reasons, personal leave entitlements during term time are rare in Africa.[15] However, in India, teachers are allowed to take a considerable amount of leave during term time. In Karnataka, for example,

[15] However, attendance at funerals has become quite disruptive at schools in high HIV prevalence countries (see Table).

this amounts to 50 days out of a 220-day school year.[16] Thus, in countries that have in-session leave entitlements, the average number of days teachers take for personal leave during term time may be a more reliable indicator of teacher motivation and morale.

Part-day absences

Poor time keeping among teachers is a major problem in some countries. Teachers arriving late, finishing early, and leaving their classes during the day can seriously reduce total instructional time. In Ghana, this amounted to only 11 hours per week in 1997 (LINS, 1999), and an average of 17 hours per week in secondary schools in Tanzania. In Karnataka, India, teachers are in class for only two to three hours per day instead of the prescribed five to six hours.

Climatic factors are also important especially during the wet season when both teachers and children often face major difficulties travelling to school.

Non-authorised leave

The bulk of non-authorised teacher absence is likely to be for non-legitimate reasons. However, some non-authorised absences may be for understandable reasons that do not necessarily reflect badly on the commitment of teachers to their jobs. For example, illness of family members is common in Africa.

6.5 KEY DETERMINANTS

The WBNAS has modelled teacher absence in each country using a wide range of personal, institutional and community/society factors. In general, the explanatory power of each country model is low and most variables are not statistically significant. As usual, causality problems make it difficult to interpret many of the correlations that are statistically significant. 'Reverse causality' is particularly intractable for some variables.

School characteristics

School level: Only primary schools were surveyed in India, Ecuador and Peru. In Bangladesh, absenteeism rates are slightly higher in secondary schools (which are privately run) than in government primary schools. Absenteeism rates were slightly lower at primary schools in Botswana, Malawi and Uganda in 2000.

Ownership: Absenteeism is widely reported to be much lower in private-for-profit schools, although there is little or no evidence to back this up. Surprisingly, this issue was not investigated by the WBNAS. Only very fragmentary evidence is available from other research. Glewwe et al report 20

[16] Thus, two-teacher schools effectively become one teacher schools for almost one-quarter of the school year.

percent absenteeism in government primary schools in Western Kenya in 1997, but only 6.5 per cent in at nearby schools run by a local NGO. Community schools in Balochistan, Pakistan are reported to have much better attendance rates than government schools. In Ghana, 80 percent of private schools reported no teacher absence during the last month compared to 50 per cent at government schools.

Non-state providers, and especially for-profit schools, are also more likely to impose sanctions on teachers who are absent for legitimate reasons. For example, this is standard practice at BRAC schools in Bangladesh.

Location: Teacher absenteeism is often reported to be worse in rural schools because teachers often go home at weekends and can be absent up to one day a week travelling to and from school. However, there is no consistent pattern with respect to school location among the WBNAS country studies. In Ecuador, absences are lowest in the remotest province, but in neighbouring Peru, the capital, Lima has the lowest rates of teacher absenteeism. Absenteeism rates are not markedly different in rural and primary schools in Bangladesh, but are considerably higher in rural secondary schools. The school location variable is not statistically significant in India.

Type of teaching: Absenteeism among multi-grade teachers is noticeably higher than among ordinary class teachers. Research has shown that, without proper training and support, multi-grade teaching can be frustrating and alienating

School facilities: Difficult working conditions are undoubtedly an important contributory factor in many countries, especially where housing is very poor and there is no pipe-borne water and electricity. Absenteeism is lower among schools with better facilities in Peru and Indonesia. In India, schools with 'full facilities' also reduces teacher absenteeism, but by only 15 per cent. There is no statistically significant relationship in Bangladesh and Ecuador.

School management: School proximity to the nearest Ministry of Education office has little impact on teacher absenteeism, except in Indonesia. Frequency of school inspections has the expected impact of reducing teacher absenteeism in India and Ecuador. In Indonesia, though, schools with more inspections tend to have higher rates of absenteeism (perhaps because they are known to be 'problem schools'), but the relationship is statistically insignificant in Bangladesh and Peru.

Personal characteristics

Gender: Absenteeism rates among primary school teachers are higher among males in India, Indonesia (2 percentage points), and Peru (4 points), but about the same in Bangladesh and Ecuador.

Age and experience: Higher qualified and more experienced teachers in India and Indonesia are more likely to be absent. In Bangladesh, on the other hand, less experienced teachers tend to have higher absenteeism rates.

Contractual status: One of the most important findings of the WBNAS is that absenteeism rates among contractual teachers are much higher than for teachers with permanent status. In Ecuador, Indonesia and Peru, this differential is more than ten percentage points[17]. Possible reasons for this are lower pay, lower status, higher incidence of illness, uncertainty about the future resulting in lower motivation, and higher levels of secondary employment.

Home area: It has been argued that local teachers are less likely to be absent because of their ties to the local community and greater sense of accountability. However, this variable was only statistically significant (at the 5 per cent level) in Peru. Local distractions including involvement in local politics and greater opportunities for secondary employment (especially farming) may negatively impact on teacher attendance.

Secondary activity: There is no statistically significant impact of secondary employment activity on teacher attendance in four out of the five WBNAS countries, which have been completed. In Bangladesh, the relationship is unexpectedly negative.

[17] There is no contract teacher variable in the Bangladesh and India case studies.

7. COMPENSATION

'I only work for my stomach'. Primary school teacher, Sierra Leone

Analysis of teacher pay is complicated mainly because teachers are such a heterogeneous occupational grouping and they work in a wide variety of different types of schools in both the public and private sectors. With respect to pay issues, there are two main groups of teachers-those who are the government payroll and those who are not. Payroll teachers can be further sub-divided into permanent and contract teachers. Some payroll teachers also receive salary supplements, which are funded by school charges. Grant-aided schools enjoy varying degrees of management autonomy. Different payment regimes exist within public and private schools and between primary and secondary schools.

Compensation packages are also quite complicated in most countries, and include both pecuniary and non-pecuniary benefits. Additional allowances and other benefits are a relatively large component of the compensation package in many countries. In Nepal, Pakistan, Cambodia for example, they are as large as the basic salary. In general, allowances are less important in SSA.

7.1 ARE TEACHERS OVER-PAID?

There has been no comprehensive, cross-country analysis of teachers' pay in LICs for well over a decade[18]. However, as part of the background analysis for the EFA Fast Track Initiative, Bruns, Mingat, and Rakotomalala (BMR) from the World Bank have computed gross teacher expenditures as ratios of GDP per capita in forty or so LICs. Using simple regression analysis, they claim that a strong negative relationship exists between teacher's pay, expressed as a ratio of GDP per capita, and enrolment rates. They conclude that teachers' salaries tend to be higher, the lower the level of economic development. More significantly, they argue that countries that have ratios greater than 3.5 also tend to have lower primary school enrolment rates. The main policy implication is that teachers' pay in all LICs should be either reduced or increased to this target, 'best practice' level. By so doing, countries with relatively high salaries will free-up more resources, especially for essential non-salary inputs, which have been 'crowded out' by teacher emoluments. For countries, where the ratio is very high, this implies that teacher's pay will have to be cut in absolute terms.

Table 4 shows that two-thirds of the 33 LICs in Africa for which data is available have salary GDP per capita ratios of over 3.5. This includes most of the Francophone countries as well as large countries, most notably Ethiopia and Nigeria. In contrast, in none of the six South Asia countries is the pay ratio significantly greater than the 3.5 target.

[18] The study by Farrell and Oliviera, published in 1993, has only salaries data from the mid-1980s.

Table 4: Primary school teacher salaries, 1985 - mid to late 1990s

Country	GDPratio 1985	GDPratio 2000	Change ratio 1985 to 2000	Real income 2000 (1985=100)
SUB-SAHARAN AFRICA				
Angola		1.5		
Benin	3.3	4.6	1.30	
Burkina Faso	10	8	-2.00	101
Burundi	6.9	5.3	-1.60	25
Cameroon		3.4		
CAR	7.5	4.9	-2.60	72
Chad	5.3	4.8	-0.50	124
DRC	3.1	0.9	-2.20	
Congo		3.4		
Cote d'Ivoire	7.8	5.7	-2.10	57
Eq Guinea	1.5			
Eritrea		7.7		
Ethiopia	14.7	6.8	-7.90	81
Gambia	3.1	3.7	0.60	140
Ghana	1.5	3.6	2.10	201
Guinea		2.7		
Guinea Bissau	6.6	1.6	-5.00	2
Kenya	5.3	5.3	0.00	73
Lesotho		6.6		
Madagascar	3.5	3.3	-0.20	78
Malawi	3.8	4	0.20	57
Mali	12.6	6.1	-6.50	
Mauritania	9.6	5.1	-4.50	72
Mozambique		3.2		
Niger	9.2	9.6	0.40	102
Nigeria		4.9		
Rwanda	7.8	4	-3.80	33
Senegal	9.7	4.9	-4.80	64
Sierra Leone		4.3		
Sudan	8	2.2	-5.80	3
Tanzania	9.3	3.6	-5.70	73
Togo		4.5		
Uganda		2.9		
Zambia		2.7		19
Zimbabwe	6			
ASIA				
Bangladesh		2.7		
India		3.4		
Nepal		2		
Pakistan		3.6		
Cambodia		1.5		
Lao		0.4		

Source: Bruns et al, 2003 and Farrell and Oliveira, 1993.

This BMR report has been very influential both within the World Bank and among other donors. In particular, the 3.5 ratio is being used prescriptively as

a policy norm for countries wishing to access FTI funding. However, as will be discussed in some detail, their analysis has the following shortcomings:

- inaccurate and misleading data
- the absence of a strong relationship between teacher pay and enrolment rates
- failure to consider the sufficiency of teacher pay in relation to minimum household livelihood needs
- no analysis of labour market factors, in particular teacher's pay relative to other occupations in formal sector employment and pay trends over time
- no consideration of other key contextual factors, especially the adequacy of teacher's pay in relation to key deployment issues, most notably attracting teachers to work in rural schools

The BMR salary data is misleading for a number of reasons. First, gross rather than net salaries are presented. Second, average salaries for all teachers are used which, given the often very sizeable income differences between primary and secondary teachers, seriously over-inflates the incomes actually received by primary school teachers. Third, much of the data is quite old. And finally, it is necessary to look at the full range of pay for primary school teachers. In particular, pay levels for unqualified primary school teachers tend to be very low.

With regarding to the econometric modelling, only a very weak and statistically insignificant relationship exists between primary school completion and gross enrolment rates and GDP per capita teacher pay[19]. Among the group of 'high performance' counties identified by BMR, the values of the GDP per capita salary ratios also vary very considerably. They assert that there has been a 'strong convergence' (p.36) over time of regional averages with respect to this pay ratio. However, this is almost wholly accounted for by marked reductions in GDP per capita teacher pay levels in Francophone Africa. There is no evidence of convergence among the other main regions, namely Anglophone Africa, Asia, Latin America and the Caribbean, and the Middle East and North Africa.

7.2 LIVELIHOOD NEEDS

The key question is the level and structure of teacher incentives adequate to achieve quality teaching? In contrast to the findings and conclusions of the World Bank research, there is a broad consensus that teacher's remuneration in the majority of LICs is seriously inadequate. This is because total pay does not cover basic household survival needs, let alone enable teachers to enjoy a 'reasonable standards of living'. The SIDA review of teacher conditions of service concludes that 'there has been a dramatic erosion in teacher working conditions and consequent brain drain of qualified and experienced teachers to other professional fields' (SIDA, 1999, p.12). Similarly, a major OECD study of teacher pay notes that 'salaries continue to deteriorate in low-income developing countries' (OECD, 1998, p.113).

[19] The coefficient of determination (R-squared) is only 0.31.

Public sector payroll teachers

The minimum household survival incomes for teachers are typically two-three times more than the basic government salary (including allowances), and frequently more than this. Table 5 shows that teachers in the large majority of LICs earn less than three dollars a day, which is usually the main source of household income. Given that most households have more than five people, household income per head is well under one dollar a day.

Table 5: Primary teacher gross income per day, mid to late 1990s (US dollars)

	<1	1 to 2	2 to 3	3 to 4	4 >
AFRICA	DRC Guinea Bissau	Burundi Gambia Malawi Rwanda Sierra Leone Sudan Zambia Zimbabwe	Ethiopia Ghana Kenya Madagascar Mozambique Nigeria Tanzania	Benin Chad Eritrea Togo	Burkina Faso Congo Mali Mauritania Niger Senegal
ASIA	Afghanistan Cambodia Lao Vietnam	Bangladesh Nepal Pakistan			India
LATIN AMERICA	Nicaragua				

Source: Bruns et al, 2003 and country data

Salary supplementation: In war situations, parents and communities frequently have to take responsibility for the pay of government teachers. The DRC is a prime example[20]. But only those children who pay school charges are normally allowed to attend. Salary supplementation by parents and communities is common elsewhere in Africa. Primary schooling is supposed to be free in most countries but, given the plight of teachers and lack of learning materials, parents are frequently expected to pay various charges. The public expenditure squeeze on secondary and tertiary education has also meant that schools are increasingly relying on tuition and other fees to supplement the salaries of existing staff as well as to employ their own teachers, but usually at much lower rates of pay. As a consequence, secondary education is becoming increasingly inaccessible for the poor.

Pay structure: The overall structure of teachers' pay shares most of the pervasive characteristics of public sector pay systems in LICs. In particular, formal education and professional qualifications largely determine salary levels. The salary scales for both primary and secondary school teachers are often very flat with very small salary increments awarded on the basis of seniority/experience, with little or no link with actual job performance.

[20] In Chad, the community pays for the salary of one half of all primary school teachers and in Togo 8 per cent.

Consequently, qualification upgrading is the main avenue for career progression and thus higher pay.

Performance-related pay for teachers in LICs is rare, which to a considerable degree is a reflection of limited resources and weak management structures. Teacher unions have also universally opposed merit-based pay on the grounds that it is de-motivating and is antithetical to teamwork and collegiality.[21] For example, a system of merit-based pay increases was introduced in Benin in 1999, but teachers went on strike in late 2003 to restore the old system of automatic pay increases.

In the late 1990s, teachers at 50 rural primary schools in Western Kenya were given sizeable pay bonuses (up to 40 per cent of basic pay) depending on student performance[22]. The assessment of the scheme by Glewwe et al concludes that 'drop out did not fall, teacher attendance did not improve, homework assignments did not increase, and pedagogy did not change'. However, they found that pupils were more likely to be tested and cramming sessions were more common immediately prior to the examinations. In other words, teachers concentrated on 'manipulating short-term results'.

Shortage subjects: There are usually no differences in pay between subject teachers at secondary schools, even though certain subjects typically have much greater shortages of teachers (especially maths and science). However, pay differences between primary and secondary teachers are often quite large, which provides a strong incentive for primary school teachers to acquire the required qualifications to teach in secondary schools.[23]

Contractual teachers

Contract teachers usually earn considerably less than permanent teachers. For example, in the late 1990s, salaries of contract teachers in Benin were 40 per cent less, Cameroon 65 per cent, Burkina Faso 66 per cent, Niger 200 per cent, Togo 50 per cent, and 33 per cent in Mali in early 2004.

The number of contract teachers has grown very rapidly in many countries as a result of public sector recruitment freezes or very slow growth in payroll ceilings. A deliberate policy of replacing permanent teachers has been implemented throughout Francophone West Africa.

[21] . PRP for teachers is quite widespread in the United States. A few South American countries have also tried to introduce merit-based schemes, most notably Chile (although this is at the school rather than individual level).

[22] The scheme was funded by a Dutch NGO that had been working in the area for a number of years.

[23] Pay differentials between primary and secondary often quite large, because secondary school teachers are university graduates whereas primary teachers have 2-4 years of secondary education and 2-3 years of pre-service training.

Non-state providers

Public and private labour markets for teachers are clearly segmented in most countries. Public sector teachers represent a usually quite strongly unionised primary segment where labour markets are 'administered' and thus heavily insulated from supply and demand market forces. In contrast, a 'secondary' labour market for private school teachers is largely non-unionised, with teachers having relatively limited security of job tenure and pay levels varying according to (external) labour market conditions.

Non-formal, not-for-profit schooling, which is provided mainly by NGOs, generally employs teachers who have much lower education levels than government teachers and relatively little professional training. They are also locally recruited and usually work for only a few hours each school day. Thus, their pay is much lower than public sector payroll teachers. Community schools in conflict and post-conflict countries typically pay extremely low salaries (in Sierra Leone, for example, between US$1 and 10 dollars per month) and parents and communities often pay in-kind by working on teachers' farms or providing food (for example rice in Madagascar).

The cost of Shiksha Karmi teachers in Madyha Pradesh in India is around one-third of government teachers. Despite relatively low salaries, the learning outcomes of non-formal schools are generally as good as and often better than government schools.

Teachers at private-for-profit schools also earn less, on average, than in the public sector. India, for example, in the early 1990s, the average pay for a government teacher was nearly two-thirds higher. In North-Western Frontier Province in Pakistan, 80 percent of private teachers earn less than public school teachers and yet learning outcomes are reported to be considerably higher in private schools, mainly because of the higher degree of direct management control over teachers most of whom are on short term-contracts.

There are a number of reasons why private teachers earn less than in the public sector. First, many private schools rely heavily on part-time teachers who are paid for each lesson taught. Salary costs per period are therefore much lower than in government schools because government payroll teachers often have relatively low teaching loads and higher rates of pay rates. Secondly, the nature of client groups strongly determines the overall level of tuition fees and other school charges. Fees at elite private schools enable them to attract the best teachers who are usually much better paid than teachers in government schools. But increasingly, private schools in LICs are catering for less well-off children who have been unable to obtain places at reputable government schools and/or whose parents have lost faith in the public school system. For example, most private secondary schools in Uganda enrol relatively poor children. And thirdly, a growing pool of unemployed teachers in many countries keeps salary levels down. Thus, mainly recently qualified teachers who are unable to find permanent jobs in government schools staff private schools.

7.3 PAY TRENDS

'Twenty years ago we used to drive our own cars to school. Now we can't even afford bicycles'. Secondary school teachers, Lusaka

There is very little, readily available time-series data on teachers' pay in LICs. It is clear though that in most countries, the real value of teacher's compensation has fallen significantly in real terms over the last two decades. Table 4 compares average primary school teacher salaries in 21 SSA countries in the mid-1980s with the mid-late 1990s. Ghana, Gambia and Chad are the only countries where real incomes have increased. In 14 countries, real incomes have fallen. In some countries, this fall has been catastrophic (Burundi, Guinea Bissau, Rwanda, Sudan and Zambia).

Protracted economic crisis coupled with economic reform programmes have progressively undermined the ability of weak states to maintain the value of public sector salaries, although much lower rates of inflation since the early 1990s (especially in Francophone countries) has helped to slow down and, in some cases, halt this decline. A key adjustment variable in economic reform programmes has been teachers' salaries. Governments have also been under pressure to expand enrolments rather than maintain the value of teacher's salaries. Growing surpluses of trained teachers have meant that there has been downward rather than upward pressure on salaries. [24] Governments have been obliged by the IMF to keep wage increases under the nominal rate of GDP growth. Major pay cuts have been instituted in some countries, mainly as a result of acute economic crises (currently, for example, in the Central African Republic, and in Cote d'Ivoire in 1996 for newly qualified teachers). Given the large numbers of public sector teachers, the inflationary consequences of pay awards is also a key issue.

Salaries plummeted in many countries during the early-mid 1990s (including Malawi, Zambia), but have improved since then. Even so, teachers' pay still fell by 19 per cent in real terms in Malawi between 1990 and 2000. In Sierra Leone, primary school teachers now earn less than half in real terms than in the mid-1990s.

Richer countries such as India, Namibia, Botswana, and South Africa have been able to increase the real value of teacher incomes. Teachers' pay in India has been increasing steadily in real terms, which has led to significant rises in unit costs (although most state governments have not implemented the Fifth Pay Commission recommendation).

7.4 RELATIVE PAY

The level of teachers' pay must be assessed in relation to prevailing pay levels for equivalent and other occupational groups. Given the heterogeneity

[24] The converse situation applies in many OECD countries where there are serious teacher shortages.

of the teaching profession, there is not one but numerous 'equivalent' occupational groups against which teacher's pay should be compared.

Again, there is very little hard evidence. In South America, diploma and certificate level teachers are relatively well paid, especially when earnings are computed on an hourly basis (see Liang, 2003 and World Bank, 2001). But, as elsewhere, graduate-level teachers earn considerably less than most other graduates.

Table 6 shows the gross pay in late 2001 of individuals in Malawi, Tanzania and Uganda who left secondary school at the end of Form Four in 1995. The immiserisation of the teaching profession is most apparent in Malawi and Uganda where the average earnings of teachers are considerably lower than those of skilled workers and even less than unskilled workers.

7.5 OTHER FACTORS

Pay administration

Salary administration is poor in most countries. In particular, late payment of salaries is very common. A recent World Bank report on education management in Nigeria notes that 'teachers may have reasonable job security but until they feel confident that they will be paid as and when due their morale will continue to be low and their attendance at school irregular'. Late pay is a burning issue in Sierra Leone, and teachers went on strike in April 2004. In late 2003, the World Bank stepped in to pay nine months of back pay owing to teachers in Guinea Bissau. In Ghana, though, there has been a significant improvement in salary management, Only 25 per cent of teachers reported that their salaries were paid on time in 1998 compared to 72 per cent in 2002.

Table 6: Teacher income relative to other occupational groups, 2001 (US$ per month, ppp).

Occupational group	MALAWI	TANZANIA	UGANDA
Professional	166	144	49
Teacher	62	105	35
Skilled non-manual	153	79	51
Skilled manual	80	63	51
Unskilled	102	57	37

Source: Al-Samarrai and Bennell, 2003.

Allowances

Rural or remote area allowances are paid to teachers in many countries, but in general they are too small to have a major impact on teacher deployment. For example, this allowance is only 20 per cent in Uganda. In some countries (for example Sierra Leone), remote area allowances have been withdrawn because of financial stringency

Most teachers are not provided with housing. This is the major complaint of teachers in the large majority of LICs. A fortunate minority of mainly secondary teachers in African countries has been housed at mission and other faith-based schools. However, there is a growing recognition of the importance of teacher's housing. For example, 15 per cent of the classroom construction budget has been allocated to teacher's housing in Uganda and a housing allowance of 15 per cent was introduced in the late 1990s in Malawi. Teacher unions are also introducing housing loan and credit schemes (for example in Rwanda and Zambia).

7.6 SECONDARY INCOME

Earning secondary income is central to the coping strategies adopted by teachers to meet minimum household subsistence needs. Secondary employment can be both teaching and non-teaching related. Private tutoring is the dominant activity in many countries. In some countries, this is school-based, for example, Academic Production Units in secondary schools in Zambia and after-school extension classes in primary schools in Sierra Leone. In Vietnam, primary schools offer only two-three hours of publicly funded lessons each day after which pupils are expected to pay. The norm, however, is for teachers to give either individual or group tuition to pupils outside of school. Private tuition amounts to a 'shadow' education system in many countries with very large proportions of pupils involved.

Other very widespread education-related activities include teachers selling summaries of textbooks as 'pamphlets'. Each subject pamphlet sells for Le.10,000 (US$3.50) in urban secondary schools in Sierra School. Teachers also sell food and drinks to pupils at their schools during break times. Common non-education activities include farming in rural areas and trading in urban areas.

It has been suggested that secondary employment activities encourages opportunistic behaviour among teachers, which can undermine service delivery in government-funded schools. In particular, teachers can pressure their pupils to pay for private tutoring by not teaching the entire curriculum during regular classes and restricting progression to the next grade.

7.7 TEACHER UNIONS AND INDUSTRIAL ACTION

The extent of strikes and other industrial action among teachers in LICs is not fully recognised. Time series data is not available, but it appears that there has been a considerable increase in strike activity among teachers in Africa in recent years. The strength of teacher trade unions varies considerably from one country to another, but teacher unions are generally quite strong in South Asia. Multiple teacher trade unions are common in LICs. More research is needed on the key factors that shape the influence of teacher unions in determining the level and structure of teacher remuneration as well as staffing policies and practices.

Strike action has been precipitated by the failure of governments to implement agreements with teacher trade unions (for example in Burundi and Kenya). Contract teachers are also negotiating hard for ‘equal pay for equal work’, especially in West Africa.

8. COMMUNITY PARTICIPATION AND DECENTRALISATION

It is widely believed that the comprehensive decentralisation of school management functions will result in significant improvements in teacher recruitment and deployment practices and higher teacher motivation and overall performance. This is because school managers and teachers become more accountable to parents and other local stakeholders and schools and/or communities have much greater direct control of teacher recruitment and deployment.

Once again, however, there is a paucity of evidence, which can be drawn upon to assess these assertions in a robust manner. A clear distinction needs to be made between government and community schools. The latter are funded in large part by parents and local communities and teachers are usually directly recruited at the local level. There are quite numerous country examples of higher motivation among teachers and better learning outcomes among community schools (e.g. EDUCO schools in El Salvador, BRAC in Bangladesh, community schools in Mail and Sierra Leone). However, the low level of pay at these schools can also lead, particularly over the longer term, to low teacher morale and high levels of absenteeism. For example, only one-third of community teachers in Zambia received a consistent allowance in the late 1990s.

The link between decentralisation and improved teacher performance appears to be more problematic in government schools. In part, this is because education decentralisation has, in practice, remained quite limited in many LICs (especially in much of South Asia). Furthermore, decentralisation can exacerbate political interference. In Nepal, for example, the politicisation of district education offices and school management committees has tended to act as a barrier to increased community involvement. Thus, the replacement of top-down political and bureaucratic interference by dysfunctional local pressures on teacher management is a real danger.

Lewin and Caillods conclude there is ‘’no clear evidence’ that decentralised recruitment by head teachers or (secondary) school boards results in increased efficiency and effectiveness (Lewin and Caillods, 2001 p.309). In India, the success to date of Panchayat Education Committees in monitoring teacher attendance, including approving leave and transfers, has been quite limited. The PROBE school survey also found that ‘there is no evidence that teachers posted in their own village perform better than others’ (Probe, 1999, p.98). In South Africa, though, the transparency of recruitment and promotions has improved considerably through the direct participation of school boards and representatives from the teacher union.

Education decentralisation remains fiercely contested in many countries. FBEAs in Africa have invariably opposed decentralisation because they believe that they have primary management responsibility over ‘their schools’. In Latin America, increased decentralisation has led to decreased teacher satisfaction and higher levels of strike activity. Teachers fear that school

management committees will become another forum for the playing out of local political conflicts. De-concentration of key human resource management functions will also be difficult to implement in many countries given high levels of bribery in the initial recruitment and posting processes.

The capacity of parents and local stakeholders to exercise control over school managers and teachers is another key factor. Government-funded primary schools in South Asia have increasingly become dumping grounds for the poor and especially girls. Ensuring effective parental and community participation is therefore very difficult. In Brazil, also, 'the parents of failing children, often poor and less well educated, lack the confidence to challenge teacher judgements or even approach them for advice' (World Bank, 2001). Interestingly, the WBNAS find that parental education and wealth has a strong negative impact on teacher absenteeism in Indonesia and Peru. However, the frequency of parent-teacher meetings is associated with higher (rather than lower) levels of teacher absence in Peru and Indonesia, and relationship is statistically insignificant in India, Ecuador and Bangladesh.

9. KEY LESSONS

This last chapter pulls together the main lessons and recommendations concerning teacher motivation and incentives and staffing. It also looks at the extent to which poor teacher motivation has been properly addressed in discussions and strategising about the attainment of education for all and considers the main research priority areas.

Improving teacher status and motivation

Much higher standards of recruitment and certification are urgently needed in many LICs in order to improve the image and performance of the teaching profession. Brazil provides an interesting example where such a strategy is currently being implemented in a truly comprehensive fashion (see World Bank, 2002). However, in most countries, more piecemeal measures are being adopted. A key initiative is enhancing the status and performance of primary school teachers by upgrading the qualifications of serving teachers from certificate to diploma levels and generally increasing minimum entry qualification requirements. The recent establishment of semi-autonomous Teacher Service Commissions in some countries (for example Malawi and Uganda) with direct responsibility for the selection and recruitment of teachers is also expected to improve teacher status by ensuring a fully transparent and rigorous process and where the rights and duties of teachers and their managers are precisely stated.

Professional growth tends to be most rapid when teacher are encouraged to work collegially. The 'new professionalism' replaces autonomy and isolation with 'communities of practice' based on a shared vision and the provision of peer advice and feedback in a non-threatening mode. Central to this process is the establishment of clear, shared goals for school improvement based on school development plans and create management structures to ensure that schools are supported in implementing these plans. Teacher job satisfaction is also improved by giving them wider responsibilities than just class teaching, including supervision, professional development, and community relations.

In theory, more learner centred teaching methods should increase job satisfaction and motivation. However, the challenge of introducing new teaching methodologies has been seriously under-estimated in most countries. Teachers with limited education and training may not be able to cope with large and rapid changes in classroom practice, which can lead to lower motivation.

Teacher deployment

Tackling entrenched teacher deployment policies and practices represents a massive challenge, in particular because it is the source of so much patronage and rent-seeking activity. Effective decentralisation over staffing in the education sector is probably the most effective way of ensuring a more transparent, equitable and efficient deployment of teachers.

There are numerous specific measures that called for. The current staffing norms for teachers in small primary schools are excessive in many LICs. Solutions include increased reliance on multi-grade teaching (with much larger class sizes) and, where possible, increasing the overall size of schools.

More emphasis needs to be given to the local recruitment of teachers with lower qualification requirements (as has been done in a growing number of countries including Pakistan, India, Sri Lanka, Nepal, Francophone West Africa, Sierra Leone).

Addressing the gross imbalances in the qualification profiles of teachers between urban and rural areas is another priority. Mandatory service in remote schools for new teacher graduates should be introduced and effectively enforced. Teachers who refuse to work in rural schools should be dismissed. Incentives for teachers in hard to staff schools, especially in remote areas should be increased significantly in most LICs.

Restrictions should be placed on excessive levels of teacher transfers between schools.

Strong incentives and sanctions should be introduced for senior managers to adopt cost-saving options with respect to deployment. There should be sizeable financial penalties for areas with teacher surpluses and incentives for areas with deficits.

Absenteeism

Detailed ethnographic, school-based research is needed in order to unearth the incidence of absenteeism that can be directly attributed to opportunistic behaviour, which is symptomatic of sub-optimal teacher motivation. Formal and informal penalties and sanctions for absenteeism also need to be carefully analysed.

Establishing the reasons for absence is critically important since this determines the type of interventions that are needed to reduce teacher absenteeism e.g. high levels of sickness among teachers, excessive term-time leave entitlements, more school-based or cluster based in-service training, greater punishments for non-authorised leave (fines, loss of pay, salary increments etc), better communications.

Without good quality time series data, it is clearly not possible to assess the impact of education reforms that seek to directly reduce teacher absenteeism. It is essential therefore that this data is collected on a regular basis.

Reducing security of tenure will probably not decrease teacher absenteeism in most countries.

Teacher leave entitlements during term time should be abolished or heavily restricted. Similarly, the time allocated to non-education related external duties should be reduced, especially in India.

Teacher compensation

Successful collaborative work among teachers should be rewarded. Financial incentives are often more effective when directed at entire teaching teams as opposed to individual teachers. But potential perverse effects (especially free rider problems) have to be addressed. Developing fair and transparent reward systems of this kind is a major challenge in the context of public education systems in most LICs.

The link between academic and professional qualifications and teacher pay needs to be progressively weakened. The salary bill has increased very rapidly in some countries as a result of very large numbers of teachers upgrading their qualifications. But, where teachers are untrained, there are clearly major benefits from becoming qualified.

Ideally, each country should have a multiple, market-driven pay structure for teachers according to subjects and location. This is much easier to achieve under a decentralised system. But it is very difficult to break away from universal pay scales.

Reducing excessive numbers of administrative support staff can result in sizeable salary savings – of up to 20 per cent in some countries.

Pay increases need to be made strategically and not across the board.

Community participation and decentralisation

Community participation in teacher management is essential, but needs to be carefully delimited.

The capacity of parents and other local stakeholders to take responsibility for school management needs to be considerably strengthened in many countries.

Decentralisation that is also linked to greater community mobilisation for the funding of basic education can lead to lower rather than higher community participation.

Teachers and EFA

Discussions about EFA and improving the quality of education have generally failed to recognise the pivotal role of teachers. In particular, the key issues of teacher motivation and pay have been skimmed over and, at times, ignored altogether. The predominance of narrowly technocratic analyses based on relatively crude education production functions has further reinforced this neglect of the key qualitative dimensions of the teaching and learning process.

Given the enormous financial implications of reversing the growing impoverishment of teachers in many LICs, it is perhaps not surprising that this problem has not been adequately acknowledged and addressed by both governments and donors. Both groups are primarily concerned with increasing access and meeting MDG enrolment targets. The teacher wage bill accounts for the lion's share of public expenditure on education. Consequently, a fairly direct trade-off exists between increasing teacher pay and increasing access to basic education. It is the latter goal that is given highest priority, especially by donors who, until quite recently, have been reluctant to fund teacher salaries. Thus, the overwhelming pressure has been to curtail the growth of the teacher salary bill and increase the efficiency of teachers. This has further lowered the morale of teachers in some countries.

Education reforms focus on improving teacher competence, the learning and working environments, and greater decentralisation, all of which can improve teacher motivation. But, many reform programmes also try to increase the workload of teachers and ignore or pay insufficient attention to pay and other conditions of service. In South Asia, the challenge of reforming public education systems is so large that increasing attention has been given to supporting parallel education provision and to shy away from staffing issues in government schools.

A future research agenda

The very limited amount of donor-funded research on teacher motivation and incentives is indicative of a general failure to recognise the critical importance of teacher performance in the attainment of EFA with reasonable learning outcomes. To date, recent World Bank research on teacher pay and absenteeism have been the only sizeable endeavours in this area. SIDA and NORAD have commissioned limited desk reviews on teacher motivation during the last five years. GTZ has sponsored some useful research on the motivation and incentives of health sector personnel in LICs, some of which could be extended to teachers.

The DfES is sponsoring a Teacher Status Project in the UK. Given the central role of teachers in attaining EFA goals, there is an urgent need for similar long-term research in LICs. DFID is currently funding a research project on teacher motivation and incentives in Africa and South Asia, which will look at some key issues, based mainly on a literature/documentation review and over 15 country case studies (see Bennell and Acheampong, 2004). But, the project does not have the resources to look in-depth at the full range of status, motivation and incentive issues, especially over time in large countries such as India, Nigeria, Ethiopia, and DRC, which have relatively low primary school enrolment and completion rates.

There also needs to be a shift in research focus away from large-scale econometrics-driven surveys to more detailed sociological and ethnographic qualitative research. Annex B summarises some of the key areas of investigation.

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ANNEX B: KEY AREAS OF INVESTIGATION

Motivation

Ascertain the motivational profiles of different groups of teachers (qualified-unqualified, female-male, rural-urban, primary-secondary). Simple survey methods and instruments (including triangulation among all key stakeholders) that focus on key aspects of job satisfaction and dissatisfaction.

Is teacher motivation a problem?. What are most important motivators and demotivators? What are the main trends? Assess the extent to which non-work related factors affect motivation.

What are the most important steps that need to be taken to improve teacher motivation, especially those that have manageable financial implications?

Occupational status

How do teachers view themselves, their work, their profession and how are they viewed by others. What are the factors that influence these perceptions? Subjective rankings by teachers, parents, pupils and other key stakeholders concerning the value to society, attractiveness/potential for job satisfaction of teaching, and teacher behaviour and performance vis-à-vis other occupations over time are required.

How do teachers feel about staying in the profession? Would they choose teaching again? Would they want their children to become teachers?

Head teacher interviews. How many teachers would you like to replace due to incompetence and poor commitment? Ranking of all (or, in larger schools, a sample) of teachers according to their level of motivation. Reasons. How many well. Adequately, poorly motivated. Trends.

Student focus groups: Get pupils to discuss prepared statements on all aspects of their schooling, focusing in particular on their teachers.

Surveys of individuals who are no longer teachers