

# The Global Status of Teachers and the Teaching Profession

Nelly P. Stromquist  
September 2018



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## Education International

Education International represents organisations of teachers and other education employees across the globe. It is the world's largest federation of unions and associations, representing thirty million education employees in about four hundred organisations in one hundred and seventy countries and territories, across the globe. Education International unites teachers and education employees.

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Nelly P. Stromquist  
August 2018



# Foreword

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The portrait is stark, the challenge is urgent. We are facing a global shortage of quality teachers, while at the same time today's teachers are burdened by increasing workloads, high levels of stress and precarious working conditions.

In this context, the *Global Status of Teachers and the Teaching Profession* is a crucial read, as it describes and quantifies the challenges teachers face worldwide, but also delineates a path towards a more sustainable future. This ground-breaking global report presents the voice of teachers across all levels of education from Early Childhood, through Primary and Secondary education to Technical and Vocational Education and Training and University education.

Our research here at Education International reveals that in far too many parts of the world teachers are increasingly employed under precarious and shoddy conditions, part time contracts are on the rise, and there is a growing lack of respect and support for one of the world's most essential professions.

Too many teachers are receiving insufficient salaries, inconsistent with their level of qualification and experience. In 79% of the countries we surveyed, teacher salaries are less than that of other professions with similar qualifications and less than 17% of Technical and Vocational Education and Training and Early Childhood Education teachers think they earn fair salaries. In addition, 15% report delays in payments, especially in Latin America, and 79% of teachers in the African region report having to travel long distances to collect their pay.

Teachers worldwide also face a shortage of teaching materials, substandard school facilities and increasingly violent working environments. Teacher burnout is also becoming a crippling and perennial problem, according to our research.

All of these factors exacerbate the burgeoning issue of teacher supply precisely at a time when the demand across all sectors is rising steadily.

The precarisation of the teacher as a respected professional, in both pay and status, coupled with trends towards limiting teachers' rights to organise and act collectively, is an underlying attempt to replace the profession of teaching with an isolated and expendable collection of cheap and obedient automatons.

Teachers' unions have a key role to play in stemming the increasing tide of attrition and burnout, in fighting for decent pay and in inspiring a new generation to embrace the profession which creates all other professions.



But they need to be engaged proactively. Most governments are not consulting teachers and their unions when it comes to education policy and funding, and on the contrary are imposing mandates, such as high stakes testing, which undermine the creative and innovative force of the profession. Accountability can never run in only one direction.

Organisations which represent teachers must also be engaged in resource and curriculum development and in the implementation of a Continuous Professional Learning and Development infrastructure to ensure access for all teachers to free career-long quality teacher learning.

The question of accountability in this report squarely points to the need for governments to accept their responsibility to provide quality education by empowering and supporting teachers to improve their professional practice and professionalism.

Finally, the unbridled expansion of private education continues to undermine a basic tenet of the right to education, free equitable access for all. This continues to produce greater social inequalities and syphons funds out of the public sector and into the coffers of private investors.

This trend to outsource the most basic of public services runs counter to governments' claims to improve educational provision and locks in inequality and privilege. As Nelson Mandela said 'there can be no keener revelation of a society's soul than the way in which it treats its children'.

This is channelled through the way society treats its teachers.

The policy implications at the end of this report give clear advice to governments about things they must do if they are going to honour their commitments to quality education and ensure students have the trained, qualified and empowered teachers they deserve.

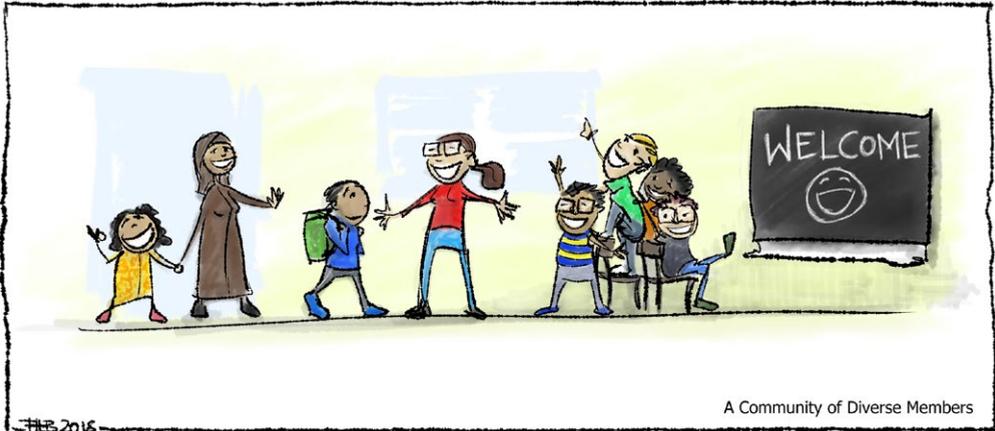
There is no time to waste.

David Edwards

A handwritten signature in black ink, appearing to read 'David Edwards'.

General Secretary,  
Education International

# Introduction



A Community of Diverse Members

Schools and other educational institutions are central to our lives. Contemporary society makes it imperative that all of us have access to formal education, with the result that most children and youth spend many years in schools. For the adults who serve in them, schools are much more than a place of work. Schools are vital places to shape the mental horizons of new generations, to convey both wide and deep knowledge, to foster values that produce healthy and stable societies, and to promote solidarity and avoid rivalry and hatred. Hence, teachers carry an enormous responsibility in their daily practice.

Teachers often enjoy the respect of many of their students—and that of the students' parents and communities. Teachers are professionals with substantial numbers of people who recognise and appreciate their labour. However, conditions of work and remuneration often lag behind the positive affection they generate in society. When they exercise their right to form and join trade unions, they gain the collective power to defend their interests and their profession. When, as a group, they face difficult conditions, collective action provides the clout rarely achieved by individual action, especially when it helps teachers to remain in the profession and to improve their wellbeing and skills across their years of service.

Teachers have accomplished a collective resolve not often observed in other unions of workers and professionals. In 1993, they combined forces to create the world's largest union of professionals—Education International (EI). Today, EI has a membership of 32.5 million, drawn from 401 affiliate organisations, operating in 174 countries and territories, supported through a secretariat in Brussels and five regional offices. According to its

*Policy Paper on Education: Building the Future Through Quality Education* (EI, 2011), this global union stands behind “a set of professional standards, ethics, conditions and rights” for the teaching profession and promotes a quality education that “provides people with the critical knowledge, abilities and skills that are needed to conceptualise, question and solve problems that occur both locally and globally.”

To maintain a complete and updated account of the status and conditions of the teaching force across the world, every three years EI conducts a detailed survey comprising roughly 100 items that cover multiple dimensions of the professional and organisational life of teachers at all levels of education. Therefore, this study touches upon the most critical aspects of the teaching profession and teacher unions. It documents the status and conditions of teaching professionals at all levels of education, as well as providing information about their teaching career, labour conditions, professionalism, and accountability. The study further discusses issues regarding government support for public education, along with privatisation. A separate section is given to higher education, given the different dynamics that characterise this sector. The document discusses the actions of teacher unions, describing forms of communication between unions and their membership, and strategies in which unions engage for purposes of mobilisation and to influence education policies. A discussion of international norms and protections of education institutions and teaching personnel follows. Finally, the study closes with some conclusions and policy implications for action at various levels.

This study is also intended to provide input to the deliberations of the Joint ILO/UNESCO Committee of Experts on the Application of the Recommendation concerning Teaching Personnel (CEART), which meets every three years to monitor the status and conditions of teachers and the teaching profession.

## **Guide to readers**

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This study is based primarily on the perspective, experience, and vision of leaders in education unions and professional organisations affiliated with EI. The data derives from a survey of all 401 affiliates conducted in September–November 2017. A total of 114 EI unions (28%) replied; however, all the largest unions participated. Of the 114 responding unions, 78 submitted complete replies and 36 partial replies. Qualitative data was also provided.

The study builds mostly on the responses to questions that offer a range of set answers from which to choose but also includes open-ended questions (18% of the items), where respondents were able to elaborate at will.<sup>1</sup> In a number of instances, this EI report is complemented by recent studies (mostly scholarly studies and institutional reports) on the topics under discussion in order to place union responses in broader contexts as well

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<sup>1</sup> The survey instrument is the same, with several modifications, as utilised in the previous triennial survey (conducted in 2014) of EI unions. The instrument was originally developed following aspects of institutional and individual teacher conditions and rights contained in the ILO/UNESCO Recommendation concerning the Status of Teachers (1966) and is based on a theoretical framework proposed by Prof. Linda Hargreaves at Cambridge University (for more details, see Symeonidis, 2015).

as to show instances of agreement or lack of agreement on those topics. *Unless otherwise indicated, all information in this study derives from the 2017 EI survey.*

The report's global account of the status of teachers is presented with a certain degree of modesty because the survey responses comprise a small proportion of all EI teacher unions and some regions are much better represented than others. Overall, there were fewer responses from smaller unions. On the other hand, it should be remembered that the unions represent a widely varied number of members, so one teacher union's response may be depicting the reality of tens and hundreds of thousands of members, not just a small collective. Nonetheless, global average responses to the questionnaire items do capture prevailing patterns across the world and, as such, provide useful grounds for understanding and further reflecting on the status of teachers.



# Understanding teacher unions

Teacher unions are highly diverse institutions. They are strongly shaped by their historical trajectory, the size of their membership, and the national context in which they function. They represent one or more of all five levels in the field of education: early childhood education (ECE), primary education, secondary education, technical and vocational education (TVET), and higher education. They represent mostly teachers (teachers, trainers, academic staff/university professors), but they also represent education support personnel (ESP)—a broad category that comprises teaching assistants, school nurses, psychologists, bursars, bus drivers, among others. We refer to ESP as a “sector” when reporting the EI survey data. Finally, affiliated to EI are not only teacher unions but also related professional organisations. For simplification purposes, we refer to both teacher unions and those professional organisations as teacher unions.

In presenting the status of teachers across this world, we are fully conscious of the great diversity that would be hidden by simply referring to the global average, since this average would not take into account the considerable variation between countries in terms of economic conditions, geographic territory, and population size, among other factors (e.g., India compared to Nepal; Brazil compared to Japan). In light of this, in some instances of the analysis that follows we present both averages disaggregated by geographic region as well as data for unions in specific countries.

## Characteristics of responding unions

### Respondents’ profile:

The large majority of the persons participating in the survey were union leaders in high positions, such as secretary-general, deputy secretary-general, president, or chair of the board. A significant proportion was composed of persons in middle management such as directors of international relations and communication officers, as well as senior advisers and researchers. Because of the salience of the positions these respondents occupy, their responses can be taken as conveying a solid understanding of the context and conditions of educational systems in their country. This being the case, we can assume their responses meet a high level of reliability and validity—both key elements when assessing the quality of data.

This report comprises responses given by education unions active in six different education sectors, as mentioned above: early childhood education (ECE), primary education, secondary education (lower and upper secondary combined), technical

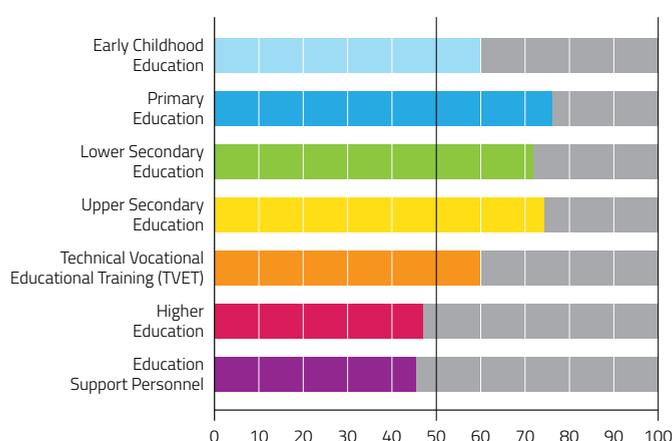
and vocational education (TVET), higher education, and education support personnel (ESP). Most of the unions represent multiple constituencies, the most frequently unionised sectors being primary and secondary education. The 114 responding unions represented a wide membership range—from as few as 100 members (Hungary) to about 4.2 million (Russia) (see Appendix 1 for a breakdown of responding unions by region), with the specific distributions noted below.

**Table 1. Number and Percentage of Responding Teacher Unions by Number of Members**

	<i>Less than 10,000 members</i>	<i>10,001- 50,000 members</i>	<i>50,001- 300,000 members</i>	<i>300,001- 1,000,000 members</i>	<i>1,000,001- 3,000,000 members</i>	<i>Total of Responding Unions</i>
Number of Unions	28	24	20	1	3	<b>114</b>
Percent	37	32	26	1	4	<b>100%</b>

It is worth remarking that teacher unions continue to attract large proportions of the labour force of the respective education levels and staff. With many EI-affiliated unions representing multiple education levels, the average representation by sector was as follows: primary education, 76%; upper secondary, 74%; lower secondary, 72%; ECE and TVET, 60% in both cases; and higher education, 47%. In all, these percentages indicate the potential for a strong voice by many EI affiliates.

**Figure 1. Proportion of Union Affiliation by Level and Sector of Education**



The extent of unionisation among teachers varies greatly across countries, from 100% in Mexico to 82% in Pakistan, 62% in Kenya and down to 17% in the Republic of Korea. Not surprisingly, the unions tend to include a larger contingent of permanent workers (about 65%)<sup>2</sup> compared with those working under fixed-term contracts (35%); no

<sup>2</sup> Note that permanent workers may be either full-time or part-time.



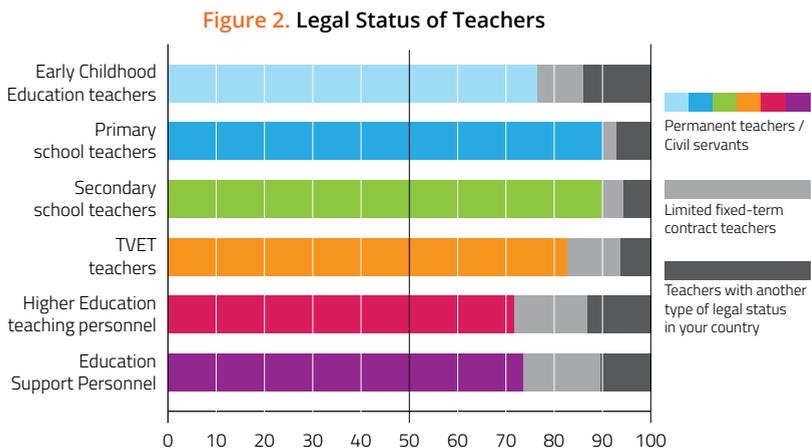
difference in this pattern can be observed by sector or sex of the enrolled workers. Likewise, the majority of unionised members (an average of 53%) work full time, while 43% were part time. This proportion of union enrollment, by full- and part-time status, seems to be similar across education sectors and sex of membership. The propensity for both permanent and full-time workers to engage in greater levels of unionisation has been documented in several studies of unionisation across the world. This probably reflects the permanent members' perception of a greater stake in the institution and a stronger possibility of union recruitment when the workers can be found in their place of work during the entire day. In addition, the survey shows that in some situations workers with insecure employment may hesitate about becoming union members or activists out of fear of discrimination or even loss of employment.

# The status and working conditions of teachers

It is useful to place teacher status and working conditions in an analytical frame that recognises the array of factors that affect them, such as the legal and social standing of the teaching profession, the attractiveness of the profession, the professional satisfaction enjoyed by teachers, teachers' pay conditions, and levels of turnover and absenteeism. Below we report on each of these issues.

## Legal status

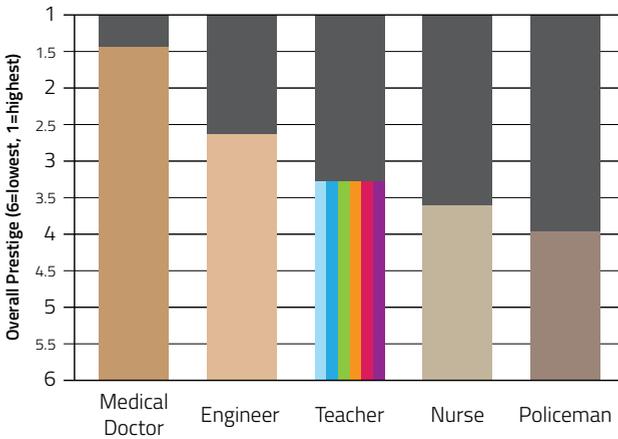
The legal status of the majority of teachers across the world is that of civil servant, accounting for an average of 82% across all levels of education. Teachers with civil service status predominate at the primary school level (90%); the proportion diminishes in secondary (83%), TVET (83%), and ECE (77%). A considerable number of teachers perform under fixed-term contracts, particular those in higher education (15%) and TVET (11%). In both ECE and higher education, about 14% of the teachers are also working under “another type of legal status,” which usually refers to very short-term appointments. Japan emerges as one of the few countries in the world where the majority of its teachers, i.e., 96% (primary, secondary, and special education) are employed on a full-time, stable basis (JTU, 2018). In many countries, at the higher education level, contingent or casual faculty are being hired on short notice and on per-hour arrangements—a labour situation that is increasingly being recognised as unfair, and even abusive (see the Higher Education section of this report).



## Social status

To explore the extent to which teachers are respected in their societies, unions were asked to rank five professions by order of perceived social status: engineer, medical doctor, nurse, policeman, and teacher. By far, being a medical doctor was identified as the most respected profession, followed at a sizable distance by engineering. Ranked in third place was teaching, closely followed by nursing. Least respected among the five was being a policeman. This ranking seems to reflect the deference we grant to professionals with complex levels of formal education and their perceived ability to affect our wellbeing through their actions.

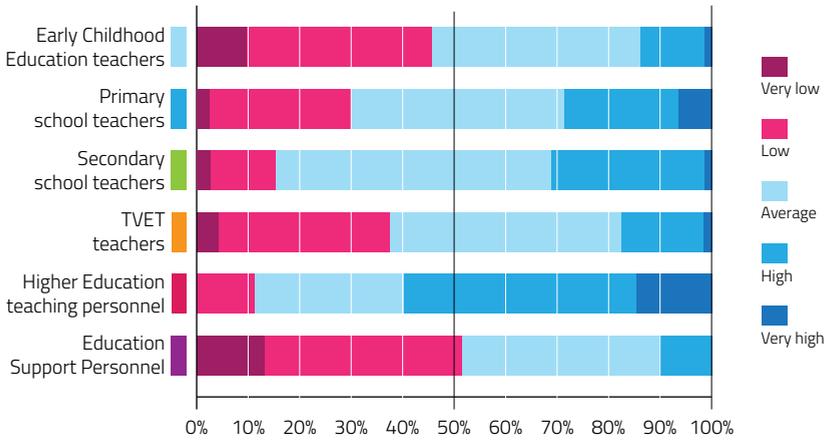
**Figure 3. Social Status of Teachers Compared to Other Professionals**



In no European or North American (i.e., Canada and the US) country is teaching selected as the most respected profession. The EI study found that only a few countries in the rest of the world identified teaching as the most respected of the professions on the list. In Africa these were the Ivory Coast, Lesotho, and Kenya; in Asia/Pacific they were Sri Lanka and Korea; and in Latin America it was only Argentina.

In terms of status *within* the teaching profession, most union leaders consider that the highest status is accorded to those who teach in universities, with 60% of the respondents stating that the prestige of university professors is either high or very high. Also enjoying high prestige are secondary school teachers, with 31% of the respondents indicating such teachers receive either high or very high prestige. Despite their crucial roles in developing children's cognitive skills, study habits, and identification with the school system (in addition to the child's social and emotional development), primary school teachers are given a much lower status than either high school or university teachers.

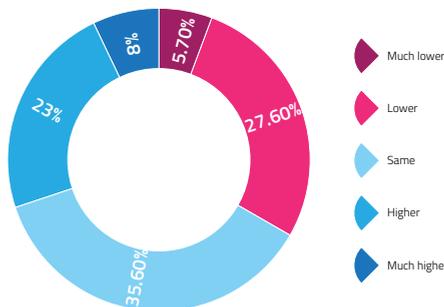
**Figure 4. Social Status Assigned to the Teaching Profession by Level and Sector**



A study based on the Programme for International Student Assessment (PISA) test data for 2006 (a test that focuses on 15-year-old students across many countries) found that, while 50% of the sampled students expected to have a professional occupation, only 10% were interested in becoming teachers. This study found a positive association between wanting to become a teacher and the expectation of a decent teacher salary; however, this association varied, being statistically significant and stronger among low- and middle-achieving students in math, but small and not significant among higher math achievers (Han, Borgonovi, & Guerriero, 2018; see also Han, 2018).

Unions were also asked to compare the status of teachers in rural areas with that of those in urban areas. Here, responding unions grant similar status to both professionals, as the distribution across the three levels (low, high, and equal status) is about the same. The similarity of status perceived by the responding unions between rural and urban teachers is a positive sign, as it indicates that teachers' status does not suffer when they are deployed to remote or more rural areas of the country. In fact, it might mean that some parents or education authorities consider the rural teachers' contribution to be of great value.

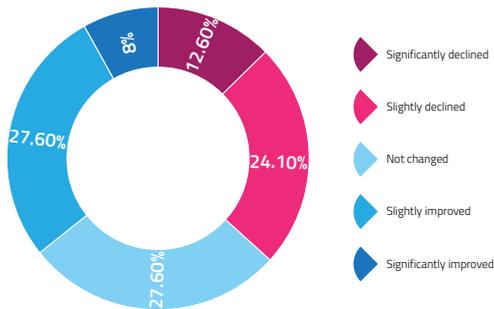
**Figure 5. Perceived Status of Rural Teachers Compared to Urban Teachers**



While the aggregate data show similarities in the status given to urban and rural teachers, in several countries this is not the case. Thus, rural teachers tend to be considered of lower status than urban teachers in Sri Lanka, Peru, Brazil, Chile, Panama, UK, Cyprus, and several former socialist republics (Romania, Hungary, and Estonia). Since this set of countries comprises those with both high and low levels of rural living, it is not clear why teachers assigned to rural areas would be considered of lower status, although the tendency to deploy untrained and inexperienced beginning teachers to rural areas might play a role.

The status of the teaching profession as a whole is considered to have undergone little change in the past five years. The distribution of status categories indicates that 28% of the responding EI unions consider the status unchanged and a similar proportion reports either a slight improvement or a slight decline. There is, however, a slightly greater percentage of unions that perceive a significant decline (13%) in the status of the teaching profession compared to those that report a significant improvement (8%). The reference to significant decline in the teaching profession receives deeper meaning when we juxtapose it with the respondents' view of its portrayal in the mass media, which may present teachers in general or education unions in particular (see below) in either a positive or negative light. It should be recognised that the mass media today, because of its widespread reach and ubiquity in everyday life, play an important role in shaping social perceptions about events, groups, and individuals.

**Figure 6. Perceived Changes in the Social Status of Teachers Over the Past Five Years**



## Safety conditions affecting teaching

According to the unions, teachers experience several conditions that render the schools in which they work unsafe. Mentioned as the main source of danger—a daily experience that has been found especially unsafe for women—is the lack of access to adequate infrastructure in the form of housing, latrines, access to water, or other related facilities (reported by 64% of the unions). This condition creates a lack of safety as many women teachers (and female students) in those conditions must walk sizable distances for such indispensable facilities (Stromquist, Klees, & Lin, 2017, documenting the cases of Togo, Tanzania, and Uganda; Stromquist, Lin, Klees, Corneilse, Choti, & Haugen, 2013, documenting the case of Liberia).

A second unsafe situation is the incidence of violence within the classroom or in the school between students or by students against teachers (reported by about 50% of the

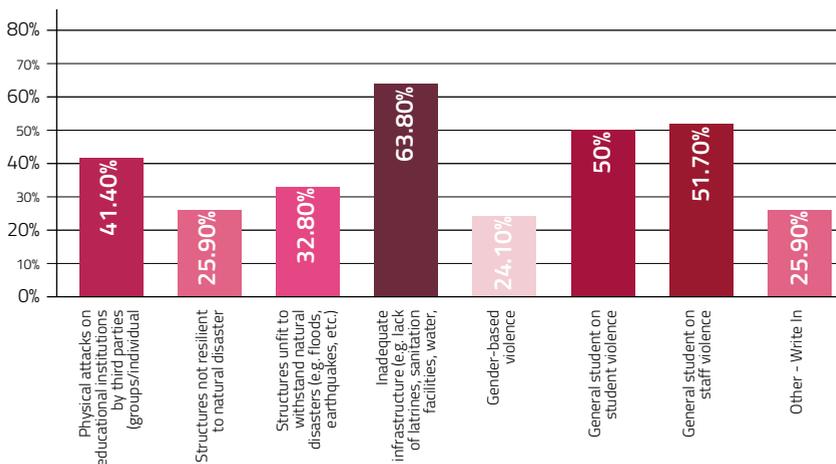
unions). Physical attacks by third parties (i.e., groups and individuals outside the schools) are noted by 41% of the respondents, and a fourth concern is linked to vulnerable school structures unlikely to resist natural disasters such as floods and



earthquakes (identified by 33% of the reporting unions). Mexico, the second largest industrialised country in Latin America (after Brazil), reports that teachers often face deplorable infrastructural conditions in rural schools and in those serving indigenous populations. The level of public investment in Mexico’s education is mandated by the Constitution; it is to be 7%, yet according to UNESCO data, it invested 5.3% in 2014.

A large-scale survey conducted by the teacher union in Japan (JTU, 2018), which explored reproductive health rights, found that 41% of the women teachers considered that their working environment affected their experiences with pregnancy and childbirth, while 20% of those expecting a child reported “maternity disorders” (defined as morning sickness, threatened miscarriage, threatened premature delivery, swelling, and high blood pressure). This high proportion of maternity disorders suggests that women teachers experience a very stressful working environment in Japanese schools. The JTU also reports extreme stress among teachers related to excessive workloads, including required “volunteer” work at home and in after-school activities.

**Figure 7. Reasons for Feeling Unsafe in the Workplace**



Physical attacks on schools by groups or individuals outside the institution (third parties) are a common phenomenon in many parts of the world. It is reported by over half of the unions in Asia/Pacific, one-third of the African countries, and Peru and Brazil in Latin America. A surprising number of European teacher unions—located in Russia, Montenegro, France, Greece, and Romania—report feeling unsafe due to attacks by third parties. The lack of latrines, sanitation facilities, and water is reported by both industrialised and developing countries. Among the industrialised countries reporting this concern are Belgium, Cyprus, Russia, Romania, and Hungary. While no European Union country reports gender-based violence as a safety concern in the schools, it is reported by unions in a number of other countries. These include those in Canada, Niger, Democratic Republic of Congo, Kenya, Zambia, Argentina, Peru, Panama, India, Afghanistan, and Malaysia. This pattern indicates that, excluding Canada, gender-based violence is a problem of greater prevalence in less industrialised countries.

In the context of safety conditions for teachers as well as the provision of girl-friendly schools, it is estimated that in India, which has the second largest population in the world, only 53% of the schools have functioning toilets for girls and that 26% have no access to drinking water (Kamat, Spreen, & Jonnalagadda, 2016). The impact of the lack of toilets is not to be underestimated, as adolescent girls have a great need for them. Although most observations in the literature regarding the lack of toilets are usually made in reference to girls, in fact women teachers also need access to toilets. A study of teachers in sub-Saharan Africa found that women teachers usually leave at lunch time in search of nearby toilets in people's houses and that, depending on the proximity of these houses to the school, some teachers might not return for the day (Stromquist et al., 2017), thus contributing to teacher absenteeism.

## **Occupational satisfaction**

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A critical issue is the understanding of those factors that have a high impact on teachers' satisfaction, since low levels of occupational satisfaction are linked to the decision to leave the profession. The answers to this survey question produced three major clusters. Not surprisingly, identified by most respondents as having the highest impact on teacher satisfaction was decent salary conditions; this was acknowledged by 78% of the respondents. Across all regions, "decent salary conditions" emerged as the main factor for teacher satisfaction. A second cluster of factors that showed high satisfaction was related to professional and social aspects that produce a supportive environment. Here, the presence of a supportive school principal and helpful administrators was identified by 63% of the respondents. Supportive environments were also created by the provision of professional development opportunities (58%), the teachers' autonomy over classroom activities (56%), a safe school atmosphere (55%), and good relations with parents and community (52%). A third cluster referred to material conditions that facilitated a good pedagogical performance by teachers; these were a reasonable class size (identified by 51% of the responding unions) and well-equipped classrooms (noted by 45% of the

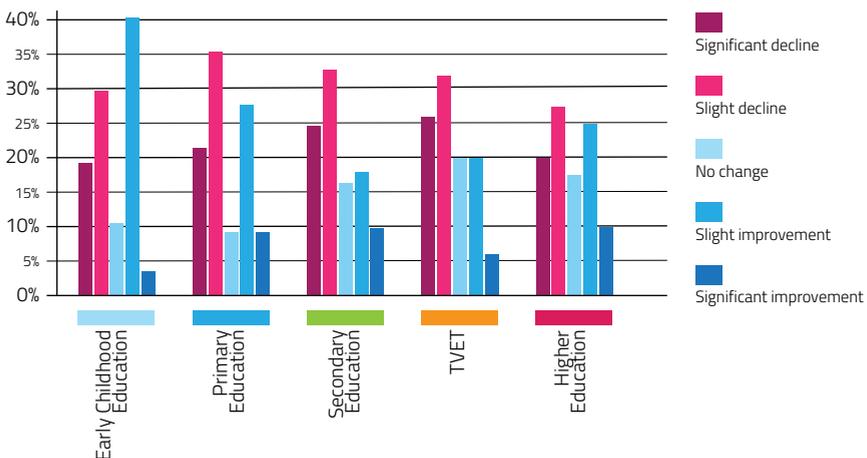
respondents). It should be noted that all these factors are amenable to public policy decisions and point to areas in which the retention of teachers would be facilitated. Recent research based on a survey study of teachers in 34 countries and economies found high-stakes testing to have a very strong and negative impact on satisfaction with the profession (OECD, 2016b). Since such tests do not reflect teacher strategies or the curricula covered in class, teachers tend to see this testing as a reduction to their professional autonomy.

**Table 2. Degree of Impact of Financial and Professional Conditions on Teacher Satisfaction**

	High impact		Moderate impact		Low impact	
	Count	Row %	Count	Row %	Count	Row %
Decent salary conditions	62	77.50%	16	20.00%	2	2.50%
Provision of professional development opportunities	46	57.50%	31	38.80%	3	3.80%
Teacher autonomy over classroom instruction	45	56.30%	26	32.50%	9	11.30%
Good relations with parents and community	41	51.90%	31	39.20%	7	8.90%
Supportive principal and other administrators	49	62.80%	24	30.80%	5	6.40%
Reasonable classroom size	40	50.60%	34	43.00%	5	6.30%
Well-equipped classrooms	35	44.90%	37	47.40%	6	7.70%
Safe school atmosphere	43	55.10%	29	37.20%	6	7.70%

A decline in the working conditions of teachers has also been reported, as can be seen in Figure 8 below. The decline was most strongly felt in primary education, followed by secondary education, and then TVET.

**Figure 8. Changes in Teachers' Working Conditions Over the Past Five Years**



## Teacher pay conditions

EI holds that “the salaries, pension schemes and conditions of service for those working in education should be comparable with those available to other groups in society with similar qualifications” (EI, 2011). This principle echoes those stated in both the ILO/ UNESCO Recommendation concerning the Status of Teachers (1966) and the UNESCO Recommendation concerning the Status of Higher Education Teaching Personnel (1997). However, only about 21% of EI teacher unions across all levels of education consider that their members are earning salaries comparable to those of other professionals with similar educational qualifications. The greatest disadvantage is felt by TVET and ECE teachers, less than 17% of whom are reportedly earning “fair salaries.” Data for OECD countries found that primary school teachers earn 81% of the salary of full-time, full-year workers 25-64 years of age who have received tertiary education. The gaps narrow slightly among teachers of lower secondary schools (85%) and a bit more (89%) among upper secondary school teachers (OECD, 2016a). There are also significant pay differences between men and women teachers in many countries. According to qualitative data for Mexico, women teachers at the primary education level earn about 10% less than their male counterparts, although the gap at the secondary level of education is much smaller. The years 2007-2017 saw widespread forms of teacher mobilisation for better pay conditions. These mobilisations took place in diverse countries that included the United States, Peru, Greece, and Benin, among several others.

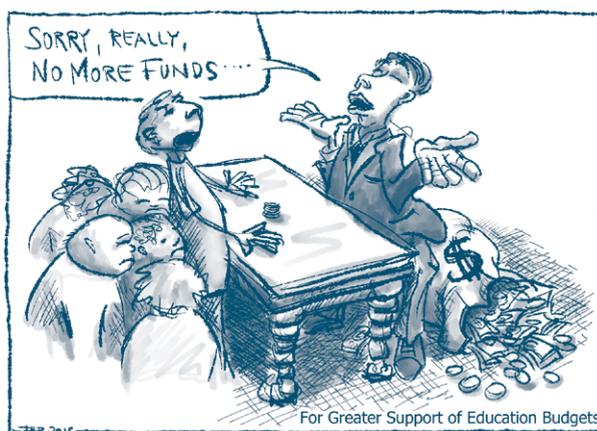
Asked if the “salaries provide adequate and sustainable living standards,” the percentage becomes smaller, as only 19% of all unions representing teachers in ECE, primary, secondary, and TVET education agree with the statement. Again, the inadequacy of their salaries is most severely felt among ECE and TVET teachers.

**Table 3. Proportion of Unions Agreeing With Statements About Teachers’ Salary Conditions**

	Early Childhood Education		Primary Education		Secondary Education		TVET		Not Applicable	
	Checks	Row Check %	Checks	Row Check %	Checks	Row Check %	Checks	Row Check %	Checks	Row Check %
Teachers' salaries are comparable to those for professionals with similar qualifications	25	17.99%	35	25.18%	31	22.30%	23	16.55%	25	17.99%
Teachers' salaries provide adequate and sustainable standards of living	21	15.33%	30	21.90%	29	21.17%	22	16.06%	35	25.55%

Some populous countries register very low levels in teacher salaries. An example is Indonesia where teacher salaries at the very top of the scale reach US\$200/month (GCE & EI, 2012).

According to 2016 data, as many as 27% of Peruvian public school teachers have a second job, with more than half of those teachers forced to run their own (small) business and 13% working in a private school in order to

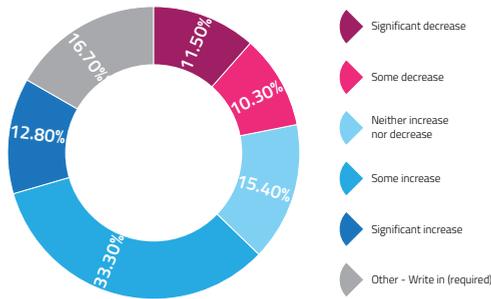


supplement their income. This pattern of having two or more jobs seldom reflects personal preferences but rather the need to generate sufficient income to maintain one's family. In several parts of the world, particularly sub-Saharan Africa, it is not uncommon for teachers to work in more than one job to increase the family budget. This was found to be the case in Liberia (Stromquist, Ling, Klees, & Corneilse, 2013), Togo, Tanzania, and Uganda (Stromquist, Klees, & Lin, 2017). Eighteen percent of the Peruvian teachers would not select the teaching profession again and 56% would not want their children to teach in a classroom (Ministerio de Educación, 2016). Similar findings were obtained in Sweden, where reportedly half of the teachers would not select teaching again as their career.

Low salaries can also be found in European countries; Romania reports that teacher salaries can be as low as 300 euros per month during the first year of teaching. Rural conditions in certain countries are linked to physical hardship. To compensate teachers for this, special provisions are sometimes put in place, such as subsidies for housing. In Europe these subsidies exist in Russia, Poland, Greece, UK, and Romania. In Africa, such subsidies are given primarily to permanent, full-time teachers and they are provided in slightly over half of the countries. Despite the existence of rural areas in Latin America, no teacher union in that region reports the existence of housing subsidies. In the case of Asia/Pacific, about 40% report such subsidies. Because salaries are low, many unions arrange credit facilities for their members. The Mexican teacher union, for instance, has created savings banks that rely on union member contributions and give them access to loans with low interest rates. These banks exist in close to 40% of the Mexican states. The EI affiliate in the Gambia has also created a network of credit unions to provide access to money, but also to cushion hardship when salary payments are delayed.

While many teachers see themselves working in environments that need improvement, including salary raises, over the past five years teacher salaries seem to have experienced a tendency toward improvement, as 33% of the teacher unions report "some increase" and 13% "significant increase." In contrast, 15% report no change and 10% a tendency toward decrease.

**Figure 9. Changes in Teachers' Salaries Over the Past Five Years**



Regarding *accessibility* to their payments, most teachers are reported to be paid on time and on a regular basis (85%); however, 15% report having payment problems as they receive their payment on time only “sometimes.” More unions in Latin America than in other developing regions report problems being paid regularly; in their view, such practices occur “sometimes” in 43% of the cases.

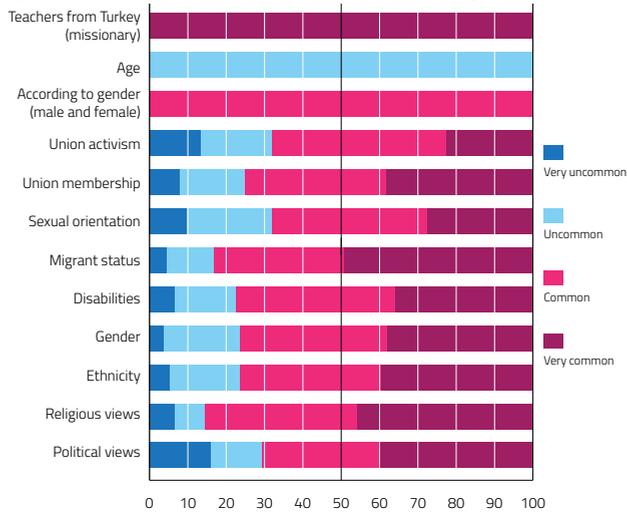
*Collecting* their pay is not a problem for the majority of teachers but it is a problem for a significant proportion of teachers (40%), particularly for those in developing countries who are posted to isolated rural areas distant from collection sites. Having to travel long distances to collect their pay is frequent in the African region, where 79% of the unions report this problem. The problem is also reported by unions in Latin America (43% of the unions) and to a lesser extent in the Asia/Pacific region (38%). Solving this structural problem would considerably reduce the rate of teacher absence.

While some educational systems are collecting statistics on teacher absenteeism, still little is known about the full array of causes underlying this phenomenon. For instance, how related to teacher absenteeism is the additional work outside the school that teachers must conduct to increase their income? To what extent is absenteeism produced by having to travel long distances to the nearest bank to cash one’s salary or due to the lack of infrastructure regarding health or housing in rural areas?

## **Social discrimination**

Throughout the world, teachers experience several forms of social discrimination in their role as teachers, but most of these complaints were “uncommon” or “very uncommon.” However, reported as “very common” are forms of discrimination arising from teachers’ political views (16%), their activism in the education union (13% of the unions), or their sexual orientation (10%).

**Figure 10. Reasons for Social Discrimination Against Teachers**



In Europe, Montenegro and France report “very common” discrimination due to political views. The lesser “common” degree of discrimination for political views is said to occur in Hungary and Greece. “Common” discrimination due to the teacher’s ethnicity is reported notably in Sweden, Hungary, the UK, Slovakia, and Montenegro. Sexual orientation is subject to either “very common” or “common” discrimination in Armenia, Slovakia, UK, and Greece, while union activism leads to “common” practices of discrimination in UK, Spain, Denmark, Montenegro, France, Greece, and Hungary.

In Africa, political views and union activism are the most common forms of discrimination. “Very common” and “common” discrimination for political views is reported in Algeria, Kenya, Ivory Coast, Lesotho, and Zambia. “Very common” and “common” discrimination due to union activism is mentioned in the case of Niger, Congo, Ivory Coast, Cameroon, and Algeria. “Very common” and “common” discrimination due to sexual orientation is reported in Benin, Democratic Republic of Congo, Lesotho, Kenya, and Ivory Coast. Ethnicity is reported as a form of discrimination in Algeria, Kenya, and Ivory Coast.

In Asia/Pacific, the most common form of discrimination is due to political views, reported by unions in Malaysia, Sri Lanka, India, and Afghanistan. Discrimination due to gender is also frequent and reported in Australia, New Zealand, India, Afghanistan, and Malaysia. Union activism is mentioned as a source of discrimination in New Zealand, India, Malaysia, and Fiji. Ethnicity as a cause for discrimination is reported in Malaysia and New Zealand, while discrimination due to religious views as a cause for discrimination is reported in Malaysia and Afghanistan.

In Latin America, few countries report any kind of discrimination. Paraguay, Peru, Brazil, and Chile report discrimination due to political views. Sexual orientation as a cause for discrimination is reported in Argentina, Brazil, and Paraguay. Ethnic discrimination is mentioned in Peru, Brazil, and Paraguay. And in North America, discrimination is reported as due to sexual orientation, which occurs in both English-speaking and French-speaking Canada.

## Immigrant teachers

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With the enormous internal and external displacement of populations in the world due to internal and international conflict, teachers can be found among those who have lost their homes and work and are seeking new lives. It is estimated that in 2017 25.4 million people were refugees across the world and that in addition there were 40 million internally displaced people (UNHCR, 2018). Data on migrant and refugee teachers now working in other countries are mostly non-existent, with only 15% of the unions reporting the availability of national data. Among the unions reporting on immigrant teachers, the number of immigrant or refugee teachers is reported to be very small. Consequently, 61% of the unions declare having no such teachers among their members, and of those who do have immigrant/refugee teachers, 71% indicate low representation.

Despite the increasing presence of refugees/migrants in Europe and the consequent increase in the number of refugee/migrant teachers in the region, precise information on their numbers is not well known, except in the case of the UK, Switzerland, Georgia, and Cyprus. UK unions estimate that there are some 34,000 immigrant teachers in their country. The unions that do have access to such information report that the number of migrant or refugee teachers is very small. Consequently, 61% of the unions declare having no such teachers among their members, and of those who do, 71% indicate low representation.

# The teaching career

Central to the understanding of teachers is awareness of the entire teacher development cycle. A helpful conceptualisation is provided by Symeonidis (2018), who proposes the following sequence:

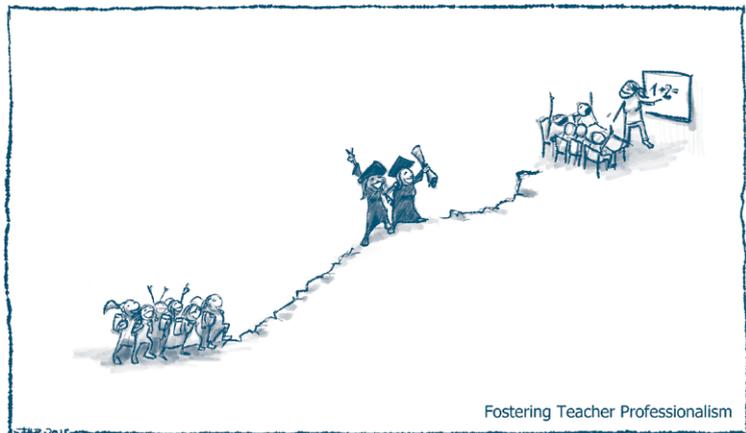


Such a trajectory involves not only a careful selection of candidates but also a well-designed teacher training programme followed by a process of induction, usually defined as the provision of mentoring to enable future teachers to become identified with their chosen profession. One important stage is that of continuous revitalisation, which is to occur through additional training throughout the teacher's service in the field. Unfortunately, very little support is given to teachers once in the field, a pattern observable both in high- and low-income countries (OECD, 2016b). High teacher shortages are reported in the African and European regions.

## Attraction to the teaching profession

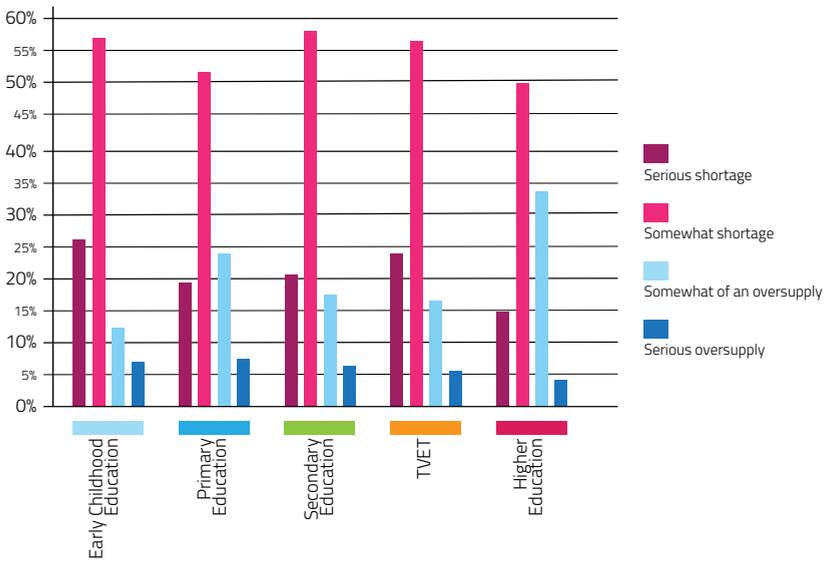
Educational systems face conditions of either oversupply or undersupply of teachers in different regions of the world; while oversupply exists in several countries, most nations experience a shortage of teachers. Across all education levels, between 50% and 57% of the responding unions indicate that their countries face "somewhat of a shortage."

The "most serious shortages" are in ECE (reported by 25%), TVET (23%), secondary education (20%), and primary education (19%).



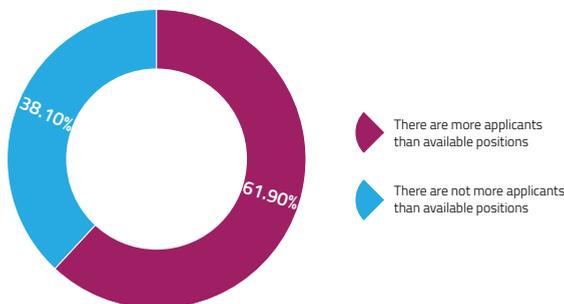
Fostering Teacher Professionalism

**Figure 11. Perceived Extent of Teacher Shortage**



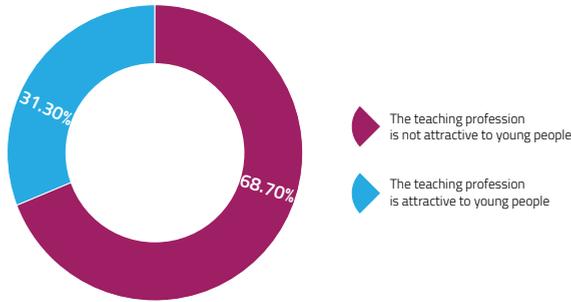
What is the pool of potential teachers within countries? EI affiliates report two contradictory trends in the recruitment of teachers: on the one hand, more people are seeking to teach than there are available positions (according to 62% of the unions); on the other hand, the teaching profession is not attracting young people (69%). In Korea, the decrease in the number of students has led to fewer teaching positions being available. In Chile, the attraction to primary school teaching is particularly low. Young people are aware of the often dismal working conditions facing teachers, thus their low interest in becoming teachers. If the teaching profession is not attracting young people, this would suggest that mostly older people are seeking to work as teachers. If those older people are experienced and have proper teaching qualifications, this should not create a problem. Some systems, such as those in New Zealand, have established retraining requirements for former teachers.

**Figure 12. More Applicants than Available Teaching Positions**



Analysis of these data by region indicates that in 40% of the European countries there are more applicants for teaching jobs than available positions. But, in contrast, only 17% of the unions in Europe state that the teaching profession is attractive to young people; these countries include Switzerland, Denmark, Cyprus, Ireland, Russia, and Denmark. In developing regions, teaching is mostly unattractive to young people. Replies from African unions indicate that the lack of infrastructure, especially in rural areas, and the fact that the teaching profession increasingly offers poor remuneration and no stability operate as strong dissuaders. Replies from the Asia/Pacific are similar but add the lack of safety in many schools and large class sizes as hindrances. Latin American responses echo the previous reasons, noting that teaching is no longer an attractive profession for middle-class youths, especially in Brazil. The lack of interest in the teaching position among young people constitutes a significant challenge as it implies that the current deficit in teachers affecting several regions in the less industrialised world is likely to worsen.

**Figure 13. Attractiveness of the Teaching Profession to Young People**



In many countries, one of the major attractions of being a public-school teacher is being recognised as a civil servant. This status carries with it a number of benefits not available in other professions, such as enjoying sickness/health benefits, pension benefits, study leave, and housing allowances in case of posting in difficult areas, although in some countries civil servants are not allowed to strike. The responses by the teacher unions to this question revealed a surprising picture. While there are clear advantages to being a civil servant, these advantages accrue mostly to those who work full time. Working part time reduces by about half the access to the entire set of benefits. Since benefits for maternity leave are limited for those working part time, this is a clear disadvantage for a teaching force that is primarily female in the large majority of countries and constitutes a form of sex discrimination.

**Table 4. Welfare Benefits Available to Teachers by Employment Status**

	Permanent contract full-time teachers		Fixed-term contract full-time teachers		Permanent contract part-time teachers		Fixed-term contract part-time teachers		Total checks
	Count	Row %	Count	Row %	Count	Row %	Count	Row %	Count
Sickness or health benefits	68	37.99%	38	21.23%	38	21.23%	35	19.55%	179
Unemployment benefits	34	28.81%	29	24.58%	25	21.19%	30	25.42%	118
Pension scheme	67	40.85%	32	19.51%	34	20.73%	31	18.90%	164
Employment injury benefits	55	35.26%	34	21.79%	34	21.79%	33	21.15%	156
Family benefits	53	40.15%	26	19.70%	27	20.45%	26	19.70%	132
Maternity/Paternal/Parental benefits	68	36.96%	38	20.65%	39	21.20%	39	21.20%	184
Invalidity/Disability benefits	57	36.54%	32	20.51%	35	22.44%	32	20.51%	156
Adequate access to support for disabled teachers	27	35.06%	16	20.78%	18	23.38%	16	20.78%	77
Survivors benefits	36	42.86%	14	16.67%	19	22.62%	15	17.86%	84
Housing allowance/ Subsidy	26	60.47%	6	13.95%	5	11.63%	6	13.95%	43
Transportation benefits	24	46.15%	9	17.31%	10	19.23%	9	17.31%	52
Annual holiday pay	60	39.47%	29	19.08%	35	23.03%	28	18.42%	152
Study leave	39	57.35%	7	10.29%	16	23.53%	6	8.82%	68
Special provisions for teachers in rural or remote areas	30	50.85%	8	13.56%	12	20.34%	9	15.25%	59
Subsidy for Rural Appointment	1	100%	0	0%	0	0%	0	0%	1
New Year's Bonus	1	25%	1	25%	1	25%	1	25.00%	4

## Teacher attrition

Leaving a profession or occupation is a phenomenon that takes place in many fields. In the teaching profession, it is a common fact. Teacher attrition (which, when excessive, leads to teacher shortages) is frequent in most countries, as 67% of the unions report being affected by the problem to some degree. The shortage of teachers is most severe

in the African region, with as many as 71% of the unions reporting the existence of this problem. It is also intense in the Asia/Pacific region (62%) and to a lesser extent in Latin America (40%).

Across education levels, unions consider teacher attrition to be either “minor” (40%) or “moderate” (40%); however, about 20% describe teacher attrition as “severe.” Teacher attrition was considered “most severe” in TVET (31%), followed by ECE (28%), and secondary education (23%). Over half of the responding unions consider that primary education faces a “moderate” level of teacher attrition. A similar proportion of respondents considers that secondary education also faces “moderate” attrition. Combining the “moderate” and “severe” attrition responses, the education sector most affected is secondary education (74%), followed by primary education (69%). Since both sectors comprise personnel with varying levels of education and technical skills, this attrition may be linked to the possibility of better paying jobs elsewhere in the labour market, particularly in the industrial and manufacturing fields. The rather high proportion of attrition in primary and secondary education should be taken as a priority for policy intervention.

Teacher attrition also affects highly industrialised countries. Complementary data from the US, based on a representative sample of 50,000 teachers, indicates that over 41% of teachers (primary and secondary education combined) leave the profession within five years of entry, producing an annual attrition rate of 13% (Ingersoll, Merrill, & Stuckey, 2014). This attrition rate has been found to be similar to that of police officers, higher than that of nurses, and far higher than among professionals in the fields of law, engineering, architecture, and higher education teaching (Ingersoll et al., 2014). The Ingersoll et al. study found that the main reason (45%) for leaving the teaching profession was identified as “dissatisfaction” due to a variety of circumstances (low salaries, scarce classroom resources, scarce opportunities for development, student misbehaviour, excessive accountability procedures, limited input into decision-making, and lack of school leadership support. Another study, also about the US (Podolsky et al., 2016), found that two-thirds of the teachers who left the profession identified low salaries and classroom size as key reasons for leaving. Reflecting the fact that teaching is a stressful occupation, a common reason cited for leaving is the lack or poor quality of administrative support (Ingersoll, 2016). As a consequence of the high teacher turnover in the US, it is estimated that in 2017 more than 100,000 classrooms were in the charge of a teacher “not fully qualified to teach” (Carver-Thomas & Darling-Hammond, 2017).

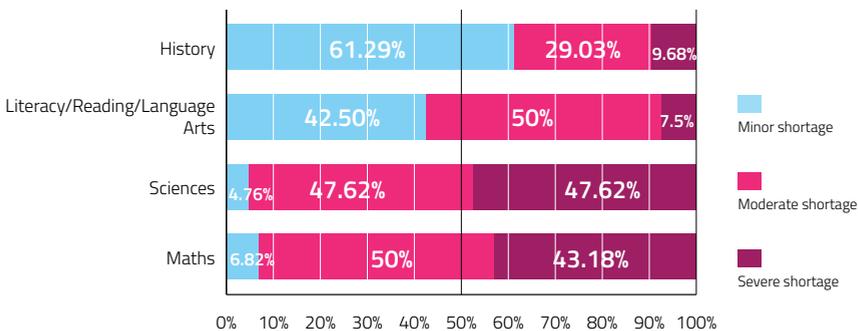
In Europe, a serious shortage for ECE teachers is reported in Sweden, Switzerland, the UK, Spain, Georgia, and Slovakia. At primary level, European teacher unions state serious shortages only in Belgium, although at secondary level three countries report severe shortages (Ireland, UK, and the Netherlands). Asia/Pacific teacher unions report severe shortages only in ECE (Japan, Sri Lanka, and Afghanistan), whereas Latin American unions report a severe shortage only at the primary level and only for one country (Chile). In North America, Quebec reports severe teacher shortages at both primary and secondary

levels. Africa identifies severe teacher shortages in primary education in Kenya and Cameroon, while numerous severe shortages in secondary education are reported in Algeria, Morocco, the Democratic Republic of Congo, Kenya, Togo, Congo, Ivory Coast, and Cameroon.

Regarding the subject matters in which teacher attrition occurs, the largest academic teacher shortages at the global level are in the subjects of science and mathematics, which the responding unions identified as facing a “severe shortage” by 48% and 43%, respectively. The area of literacy/reading/language arts is reported to have a “moderate shortage” by 50% of the respondents, although 43% consider that it faces a “minor shortage.” History is reported to face primarily a “minor shortage” (61%) though 29% consider the shortage to be “moderate.”

Regional analysis of the EI survey data indicates that serious teacher shortages in science exist in one-third of the European countries (Belgium, Hungary, Ireland, UK, Spain, Slovakia, Denmark, Netherlands, and Germany). The European Union also reports shortages in mathematics in one fifth of its countries (Belgium, Ireland, UK, Slovakia, France, Netherlands, and Germany). This finding corroborates similar shortages in mathematics and science found in OECD countries (see e.g., Santiago, 2002). In low-income countries, “severe” shortages in mathematics and science are also common. In the African region, teacher shortages are particularly severe in mathematics and science in about one-fifth of the reporting countries (Central African Republic, Togo, Congo, Democratic Republic of Congo, Ivory Coast, and The Gambia). Teacher unions in Latin America also report severe shortages in mathematics and science, but in only two countries (Brazil and Chile). Asia/Pacific reports severe shortages in both mathematics and science also in only two countries (New Zealand, Afghanistan). In a large number of European countries the teaching profession is aging, as many teachers are retiring or will be retired. The widespread severity of teacher shortages in these two critical subjects suggests the need for more vigorous national policies to address the recruitment and retention of teachers in these areas that are so linked to the development of competencies and skills in scientific fields.

**Figure 14. Teacher Attrition by Discipline and Degree of Severity—Four Disciplines**



According to the responding unions, reasons for leaving the profession are multiple. Among the most salient in Africa are low salaries, compounded by high student/teacher ratios in primary and secondary schools, the poor infrastructure of rural schools, and the harsh life in rural areas. Teacher unions in the Asia/Pacific region report that, despite official limits on class size, many classrooms have large numbers of students. In this region also, teacher unions state their teachers are having to deal with students with high needs due to poverty, special needs, and long absences, which make teaching a difficult task. Replies from the Latin American region add that low salaries for university trained teachers in areas such as the natural sciences, mathematics, and English lead them to seek alternative jobs. Several studies on teacher attrition have found that in many countries, a large number of those who leave were teaching mathematics and science (Ingersoll, 2011; Podolsky, Kini, Bishop, & Darling-Hammond, 2016; OECD, 2002), which suggests a greater appeal of better paying jobs elsewhere—and not always requiring related knowledge.

Among those who leave the teaching profession are persons with the highest test scores (Stinebricker, 2001). Conversely those who enter the profession without full preparation are much more likely to leave than those with proper credentials (Podolsky et al., 2016). It has been observed that, although teaching calls for strong dedication to the profession and a rather high level of altruism, the possibility of earning higher salaries in alternative occupations has functioned as a strong incentive for teachers to leave the profession. Such incentives have been particularly visible in countries undergoing a transition from centrally planned economies to a market economy, such as Russia, China, and Cuba.

Teacher attrition usually results in the hiring of less qualified personnel to fill vacancies. In part due to teacher attrition and in part to structural adjustment policies and the increased access to education because of the abolition of user fees, in sub-Saharan Africa fewer than 75% of the teachers at lower secondary levels of education are trained (GCE & EI, 2012). In India, the loss of teachers (as well as low student enrollment in rural areas) has generated many multi-grade schools (i.e., usually one-room schools in which a teacher usually serves students in several grades). It is estimated that 75% of the primary schools in India have three or fewer teachers to take care of all grade levels in primary education (an eight-year programme), which, given disparities in cognitive development among students, is a considerable challenge even for the best prepared teachers. This, added to the fact that many teachers in India are not trained, has a compound effect on the quality of school provision (de Koning, 2013).

# Teachers' labour conditions

National data on the number of employed teachers who meet the required minimum qualifications are not available to unions according to 69% of the responding teacher unions. Lack of access to these national statistics ranges from 44% among European unions to about 75% in both Latin America and Asia/Pacific. Unions' limited access to information on teacher qualifications can be a major liability when engaging in negotiations with government regarding the professional needs of the teaching labour force.

## Teacher qualifications

Official minimum qualifications are required across all levels of education. As expected, these minimum qualifications rise with the level of education a teacher is assigned to teach.

**Table 5. Minimum Qualifications Required by Level and Sector of Education**

	Primary or no qualifications		Upper-secondary education		Teacher education certificate		Specialised Graduate Diploma		Undergraduate degree		Undergraduate degree		Responses
	Count	Row %	Count	Row %	Count	Row %	Count	Row %	Count	Row %	Count	Row %	Count
Early childhood education teachers	5	7.50%	8	11.90%	23	34.30%	14	20.90%	13	19.40%	4	6.00%	67
Primary school teachers	0	0.00%	5	6.80%	27	37.00%	14	19.20%	20	27.40%	7	9.60%	73
Secondary school teachers	0	0.00%	0	0.00%	11	16.20%	21	30.90%	23	33.80%	13	19.10%	68
Vocational education and training teachers	0	0.00%	1	1.60%	13	20.60%	23	36.50%	23	36.50%	3	4.80%	63
Education support personnel	6	11.80%	24	47.10%	4	7.80%	8	15.70%	6	11.80%	3	5.90%	51

Regarding ECE, a small number of countries require only primary or no qualifications (8%) but the majority asks for a teaching certificate (34%), or a specialised graduate diploma (21%), or an undergraduate degree (20%).

**Primary school** teachers are officially required to have a teacher education certificate (37% of countries), an undergraduate degree (27%), or a specialised graduate diploma (19%). But, given the considerable teacher shortage at this level in certain countries, the de facto level of qualifications for practicing teachers tends to be much lower than the officially set standards. Officially in India, private schools must hire teachers with the minimum qualifications mandated by the Right to Education Act, but this does not happen in reality, so in practice there is a de-professionalisation of teaching in that country. At present, India has a teacher shortage of 689,000 primary school teachers, which implies that to cover the demand many teachers are likely hired with very minimal qualifications (Kamat et al., 2016.)

**Secondary school** teachers are required to have an undergraduate degree by many countries (34% of the cases), a specialised graduate diploma (31%), or a master's degree (19%). Only a few countries officially accept secondary school teachers with only an education certificate (16%). Again, the reality in some countries is quite different. In countries with severe teacher shortages, it is possible to find teachers working with only a high school education.

Official minimal qualifications are also high for TVET teachers, with 37% of the countries requiring an undergraduate degree and 37% requiring a specialised graduate diploma.

Regarding the ESP, as noted earlier, this sector comprises union members in a wide range of non-teaching positions within educational institutions. Accordingly, the minimal qualification required varies dramatically, with 47% of the countries requiring only a high school diploma, and about 16% of the countries requiring a specialised graduate diploma and a similar percentage (12%) requiring an undergraduate degree. To understand the required levels of education for ESP members, it would be necessary to have a detailed list of the wide range of tasks they perform within the education systems.

## **The changing civil service status of teachers**

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Globally today, only slightly more than half of teaching personnel across all levels of education are in permanent employment and/or enjoy civil servant status. The rest work under a limited or fixed-term contract or in some other form of legal working arrangement, as shown in Table 6. Statistics for ECE personnel were not reported, which suggests they are working under very variable conditions; this is an area of education that merits more study.

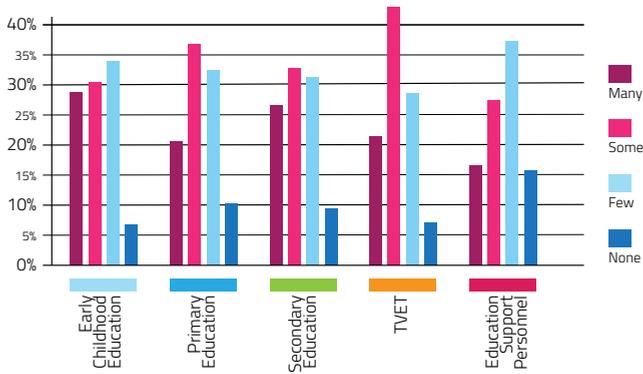
**Table 6. Employment Conditions of Teachers, Researchers, and Support Staff by Work Status, Percentages**

	Permanent teachers / Civil servants		Limited fixed-term contract teachers		Teachers with another type of legal status in your country		Total number of teachers by sector		Responses
	Count	Row %	Count	Row %	Count	Row %	Count	Row %	
TVET teachers	30	88.20%	18	52.90%	7	20.60%	12	35.30%	34
Primary school teachers	41	93.20%	27	61.40%	8	18.20%	24	54.50%	44
Secondary school teachers	37	92.50%	25	62.50%	7	17.50%	22	55.00%	40
Higher education teaching personnel	23	82.10%	16	57.10%	5	17.90%	12	42.90%	28
Education support personnel	22	75.90%	15	51.70%	4	13.80%	13	44.80%	29
Total number of teachers by employment status	15	71.40%	10	47.60%	2	9.50%	11	52.40%	21

Teachers' status as civil servants varies across regions and level of education. In general, more teachers at primary and secondary levels of education enjoy civil service or permanent status than at any other level of education. Higher education is the level with least access to permanent employment. In several countries, full-time employment for teachers has become a rare phenomenon. In Mexico, while 45% of teachers in middle and upper secondary education are counted as working full time, only 10% work 40 hours per week; the rest of the "full-timers" work either three-fourths or half-time.

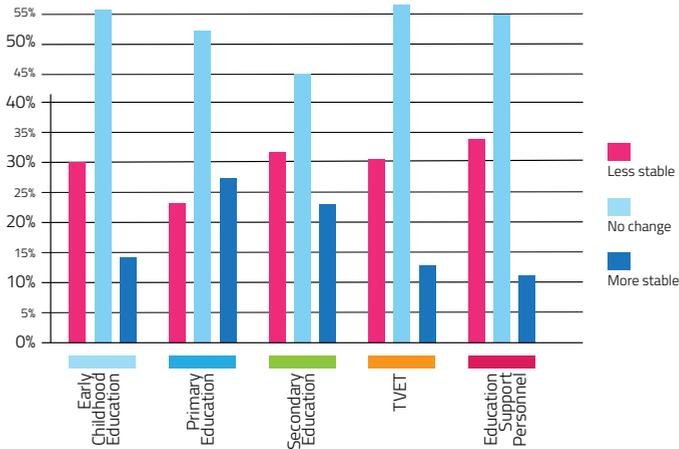
Asked to report on trends over the past five years in the hiring of teachers on *temporary contracts*, more union respondents indicate that there have been either "some" or "many changes" (about 60% total for both) compared to "few changes" or "none." Few changes are reported regarding the hiring of ESP.

**Figure 15. Proportion of Teachers Hired on Temporary Contracts over the Past Five Years, by Level and Sector of Education**



Regarding trends in the stability of employment, more than half of the education unions report no change over the past five years. There is a slight tendency, however, toward “less stable employment” among ESP personnel (as reported by 34% of the unions), secondary school teachers (32%), and TVET teachers (31%).

**Figure 16. Stability of Terms of Employment Over the Past Five Years**



## Fixed-term contract teachers

The practice of hiring teachers on a temporary basis (i.e., a contract with an expiration date as opposed to one with no specified time limit) is expanding throughout the world. Across all levels of education, contract teachers are a vulnerable sector of the teaching force as they accumulate no pension, have no benefits, and are seldom given salary increases. Lauer (2018) argues that the considerable growth of fixed-term contracts signals a precariousness of a structural nature, affecting especially the employment

stability of young people. It is widely accepted that work stability is a key element in developing workers, improving productivity and even performance, and in increasing the value added to goods and services in the economy. This leads Lauer (2018) to maintain that “increasing salaries is not enough; incentives to reduce the use of fixed-term contracts must be in place to end irregularity in employment and recognise worker’s rights.”

Fixed-term contracts have increased rapidly in India and parts of sub-Saharan Africa; schools are usually staffed by underqualified and unsupported teachers (UNESCO, 2017). In India, contract teachers have become a central piece of education reform (de Koning, 2013). This country has made a commitment to the Right to Education Act of 2009. Although this Act mandates acquisition of minimum qualifications over a period of five years, at the same time it gives for-profit institutions the opportunity to hire teachers under very flexible conditions. As in other countries, the use of contract teachers has been a common strategy to expand access to primary education. This policy has helped reduce teacher/student ratios but has also considerably decreased investment in education by the government, with a consequential impact on educational quality.

In Peru, data produced by the Peruvian Ministry of Education for 2017 indicate that there are 360,000 teachers in the country, of whom 160,000 (44%) are on short-term appointments. This condition affects not only the job security of teachers but also the quality of the educational system, as these temporary teachers tend not to be well prepared for teaching, and frequently leave the system as soon as better working opportunities emerge. If to this we add that 60% of the school principals in Peru are also on temporary contracts—many having been neither evaluated nor trained—we are left to suspect the effective operating of public schools.

## **Part-time teachers**

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Contributing to low teacher salaries is the proliferation of part-time teaching positions. Working on limited time contracts has clear consequences for teachers at both primary and secondary education levels as well as for instructors and adjunct faculty in institutions of higher education, as these persons have very limited access to benefits such as health insurance, life insurance, or retirement. This is a growing trend in many countries, whether high, medium, or low-income societies. In some countries, such as Mexico, about 55% of the teachers in middle and upper secondary schools work on a per-hour basis, generating an income that is far from sufficient to live. This forces many teachers to have an additional job (also part time), such as clerks in private firms, taxi drivers, and teachers in private schools and other public schools as well. Since the national economic situation is weak in Mexico, some teachers will opt to work on an hourly basis instead of having no income at all.

If we add higher education into this discussion, it should be noted that graduate students in countries such as the US and Canada are slowly becoming an important fraction among

the cadre of university instructors. If figures are re-calculated to cover not-full-time tenure-track faculty, contingent faculty, and graduate students serving in an instructional capacity, the students represent 11% of all instructors in the US (US GAO, 2017).

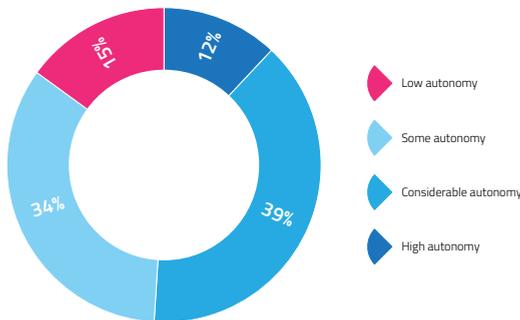
The situation of teachers working under the category of “another type of legal status” reveals surprising arrangements in some countries. In the Democratic Republic of Congo there are three types of teachers in the public education system: one is the regularly paid teacher; the second is the teacher who belongs to the “New Unit” (*Nouvelle Unité*) and is already in service, but not paid by the government and depends on payments by parents; the third is the teacher who is “not paid” (*non payé*) and is working on a voluntary basis. An independent teacher union in Australia reports that, if teachers on permanent status are promoted, they are “forced to sign a contract and be in employment on fixed-term contracts.” In Europe, the UK reports that at all levels of education there is a limit to the number of teachers who serve under fixed-term contracts—a welcome measure as it protects the rights of teachers. In Estonia, the union reports that it does not have access to data on working arrangements at the higher education level but that, according to the Ministry of Education and Research, about 95% of higher education teaching and research personnel work today under permanent contracts. In Canada, the federation representing all teacher unions in that country reports that there is an increasing flexibilisation of labour in post-secondary education, which has resulted in the use of “limited-term lecturers, seasonal, and contract instructors.”

# Teacher professionalism

Teacher professionalism is defined as possessing a strong knowledge base, having autonomy in decision-making, and engaging heavily in peer networks (OECD, 2016b). It can be readily observed that professionalism can hardly be developed when employment is part time and institutional affiliation tenuous. Advocates of greater professionalism link it to “professional unionism,” which they see as concomitant to building a union “that is flexible, responsible, and public spirited” (Kirchner & Koppich, 1993, p. 201), one that is characterised by “moving away from self-interest and self-protection to diagnose complex problems and to change systems” (Kirchner and Koppich, 1993, p. 102).

Globally, teachers are reported to be enjoying “considerable” pedagogical autonomy, with only 15% of teacher unions reporting low autonomy, while a large portion reports having some autonomy, considerable autonomy, or high autonomy. It is to be noted that those enjoying “high autonomy” in pedagogical areas represent a small proportion of cases and are found in countries that include Denmark, Albania, Ireland, France, Burkina Faso, Argentina, and Sri Lanka.

**Figure 17. Degree of Public School Teachers’ Pedagogical Autonomy**



Most teacher unions in Africa, Asia/Pacific, and Europe consider that their teachers enjoy either high or considerable autonomy. In contrast, in Latin America, such degrees of autonomy are reported by only 28% of the responding unions.

Most respondents indicate moderate levels of need for support to improve teaching practices across all the categories presented to them. Yet, several areas were identified as being in a “high level of need” for such support. These areas comprise support for students with special needs (59%), developing ICT skills for teaching (54%), and having access to gender and sexuality sensitivity training (50%). A high need is also identified for

the provision of student counselling (38%) and for instructional methods and strategies (35%). Surprisingly, less than 29% of the responding unions identify as having a high need for support in aspects of content, performance, and strategies in mathematics, culture and the arts (19%), and in reading (27%).

**Table 7. Level of Need of Support for Teachers' Professionalism**

	<i>No need at all</i>		<i>Moderate level of need</i>		<i>High level of need</i>	
	<i>Count</i>	<i>Row %</i>	<i>Count</i>	<i>Row %</i>	<i>Count</i>	<i>Row %</i>
Content and performance standards in mathematics	5	7.20%	44	63.80%	20	29.00%
Content and performance standards in culture and the arts	11	18.60%	37	62.70%	11	18.60%
Content and performance standards in reading	14	21.20%	34	51.50%	18	27.30%
Content and performance standards in science	8	12.10%	41	62.10%	17	25.80%
Teaching students with special needs	8	11.40%	21	30.00%	41	58.60%
Instructional methods and strategies	8	11.60%	37	53.60%	24	34.80%
ICT skills for teaching	5	7.00%	28	39.40%	38	53.50%
Student counselling	7	10.60%	34	51.50%	25	37.90%
Gender and sexuality sensitivity training	7	10.30%	27	39.70%	34	50.00%

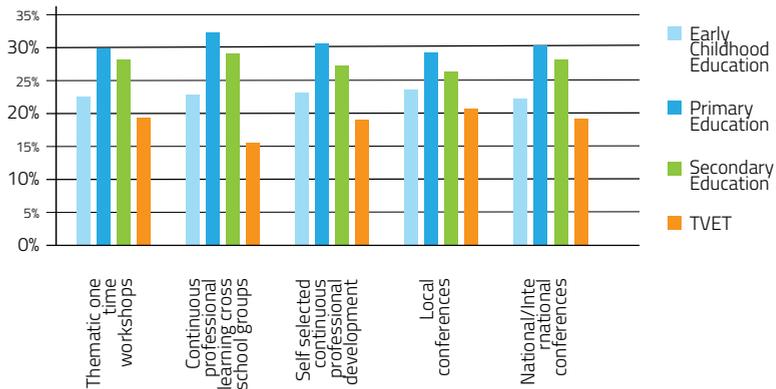
In Latin America many teacher unions express a high need to increase teacher professionalism and support in the area of mathematics. Teacher unions in Africa also express a high need for teacher professionalism and support in mathematics, but they report a higher need in the area of culture and the arts. Most of the teacher unions across the three less industrialised regions report a moderate need for teacher professionalism and support in the subject of reading.

## **Continuous Professional Development**

To obtain new teaching capabilities or to strengthen current ones, teachers need access to continuous professional development. In educational systems with active strategies for teacher improvement, access to professional development is free, widespread, and regularly provided. This is the case in countries whose students regularly perform higher than average in PISA scores, such as Australia, Canada, Finland, and the Netherlands (OECD, 2016b). Continuous professional development is all the more needed in countries

where there is a severe lack of well-trained teachers as well as limited support for practicing teachers. The data shown in Figure 18 indicates that only a small proportion of teachers (about 30%) across all levels of education has access to professional development. Slightly more teachers in primary education receive professional development than in either ECE or secondary education.

**Figure 18. Teachers' Participation in Various Kinds of Continuous Professional Development**



Although not explored in the EI survey, it is well known that professional development must intentionally cover both subject matter knowledge and pedagogical knowledge (Shulman, 1987), for knowledge without effective transmission to students is likely to be ineffective and skills in conveying knowledge require mastery of the content that is to be transmitted. Research indicates that some types of professional development tend to be more effective than others. On the basis of prolonged case studies and relevant research literature, Rizvi and Elliot (2007) conclude that teachers benefit greatly from “doing, reading, and reflecting about their *context* in their school” (p. 9, emphasis added). Bringing professional development to the place of work builds up on the profound embeddedness of teachers’ knowledge and links the new learning to emotional support as well as structural and administrative support to work collaboratively with other teachers. This strongly suggests that “enlightened and committed principal[s]” are essential to the process (Rizvi & Elliott, p. 16).

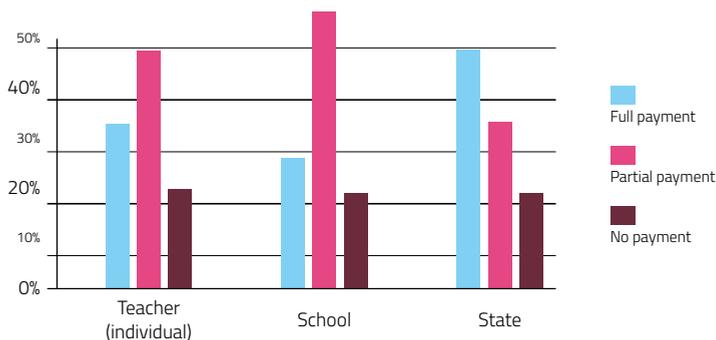
From a gender equality perspective, the content of professional development must include sex education. Sexual health, gender equality, and human rights are considered today to be interrelated and part of what is known as “comprehensive sexuality education.” This approach was first developed by Planned Parenthood in partnership with the Sexuality Information and Education Council of the US in the early 1960s and has been gradually introduced in various educational systems across the world. Its curriculum provides information about human development, anatomy and reproductive health, information on contraceptives, childbirth, and sexually transmitted infections; it also promotes discussions about family life, relationships, culture and gender roles, gender equality, sex discrimination, and sexual abuse (Family Watch International, c. 2012).

Thus, professional development is needed in areas dealing with gender: sex education, gender-related violence, negative aspects of culture (e.g., caste discrimination, early/forced marriage, female genital mutilation, and gender-biased legislation). It is worth remarking that, from the perspective of European students in secondary and higher education, global citizenship education should be also a priority for teacher professional development (EI, OBESSU, and European Students' Union, 2016).

## Conditions of access to professional development

The EI survey explored three main levels of providers of professional development: the national level, the school level, and the level of individual teachers, at their own initiative. The focus of this question was the extent to which the cost of such training was (a) fully covered by the providing agency, (b) partly covered, or (c) not at all. The survey results indicate that professional development is not being provided on a free basis for most practising teachers. Globally, the highest educational authority (whether federal or state level) pays for it in full for about half (48%) of responding unions, and partially covers such expenses for about one third (33%) of the cases. When the government organises professional development activities, teachers are usually required to pay in full in 19% of the cases. Teachers in Europe—a region that ostensibly has more educational resources—still find that the state covers their professional development in full in only one-fifth of the cases. It must be observed that a government practice that makes teachers pay for their own professional development—when teachers are already clearly recognised as receiving lower salaries than other comparable professions—does not foster positive conditions for a high quality teaching force. In several countries, such as Peru, funds for continuous professional development come from the Ministry of Finance; since this funding decision is not made at the Ministry of Education, it is unclear to what extent decisions to invest in professional development are made with fiscal rather than pedagogical criteria in mind.

**Figure 19. Sources of Payment for Professional Development by Level of Financial Support**

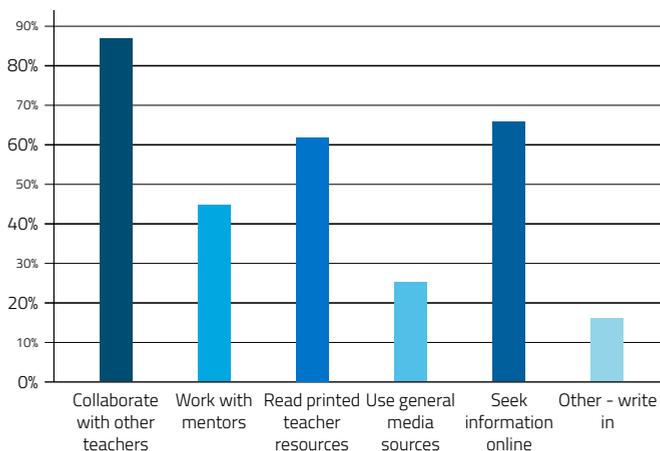


When professional development is provided at the school level, the local contribution is usually modest, with 26% of the schools covering the full cost of the professional development, 55% of the schools requiring partial payment, and individual teachers

being responsible for full payment of such training in 19% of the remaining cases. When individual teachers select their own professional development, they must pay in full for it in 33% of the cases, or receive partial reimbursement in 48% of the cases, or pay in full for their initiative in getting access to professional development in 20% of the cases. Again, the contribution of teachers to their own development—whether provided by the government, the local school, or sought by the individual teacher—requires a significant personal contribution. It can be surmised that in conditions of low teacher salaries, professional development cannot take place as regularly as it should.

In the absence of government provision of professional development, to improve their teaching practices in everyday life, teachers use different strategies to get access to relevant information. The most popular way of improving themselves is through collaboration with other teachers (87%) and reading printed teacher resources (62%). Working with individual mentors is also practiced but less frequently (45%).

**Figure 20. Teachers' Preferred Professional Development Activities**



Among European teachers, there is a preference for engaging in professional development either through collaboration with other teachers or through self-instruction via the use of the internet. In Latin America and Africa, there is a strong preference for working in collaboration with others and relying on access to printed materials. In Asia/Pacific and North America there is also a strong preference for collaboration with others as well as working with mentors.

No major differences can be observed in the mode of professional development being used across levels of education since the use of workshops, school groups, self-selected professional development, and local and international conferences are utilised in similar proportions at each level. A welcome fact is that in about half of the countries throughout the world (except Latin America, where the proportion is substantially lower), teachers can decide the forms of continuous development they wish to receive. On the other hand,

time—a precious resource for accessing continuous professional development—is scarce, as the granting of working time for teacher professional development is given in only a few countries.

Professional development is specifically recognised as fundamental in Sustainable Development Goal (SDG) 4, dealing with education. It is also acknowledged as central to the decent work agenda in SDG 8. Especially given the low teacher salaries reported by the majority of EI unions in the survey, *fully subsidised* professional development would seem imperative. According to the teacher unions, there is a firm belief that the provision of professional development opportunities would have a high impact on teachers' level of satisfaction according to 59% of the responding unions. However, individual teachers see themselves often in the position of having to pay for their own training; this is evident in teacher union responses indicating that teachers must pay either totally (39%) or in part (48%) for their own professional development.

A study (Bascia & Stevenson, 2017) based on a seven-country qualitative approach came to the conclusion that teachers face a considerable gap between the teachers' demand for union support and the resources available to satisfy their demand. In the view of these authors, it was imperative for teachers to revitalise their collective action, i.e., engage in "union renewal." Bascia and Stevenson felt that the best way to proceed would be by making union participation central to teachers' professional identity. In their view, this will entail creating broader alliances with the diverse identity groups within the unions, engaging to a greater degree with social media, and developing stronger linkages among teacher unions at all levels of education as well as working with other unions, community groups, and students (the latter being the case in Chile and the US).

## Perceived relevance of professional development

As a whole, 77% of the responding teacher unions judge the level of quality and relevance of teacher professional programmes to oscillate between being of "some quality and relevance" and "not at all." Examining professional development across levels of education reveals similar views of quality and relevance, as shown in Table 8 below.

**Table 8. Quality and Relevance of Professional Development for Teachers Across Levels of Education, Percentages**

	<i>Relevance of Professional Development to Teaching</i>		
	Yes	To some extent	No
Early Childhood Education	21	63	17
Primary Education	23	65	12
Secondary Education	23	61	16
TVET	24	60	17



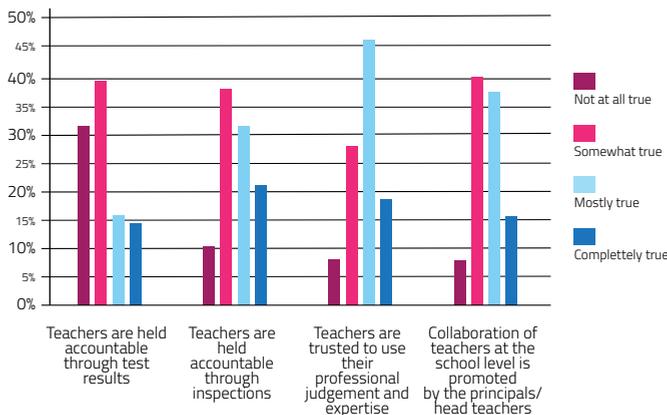
Within the perceived medium quality and relevance responses regarding professional development (i.e., “to some extent”), only a few unions across all regions believe that it leads to career progression, that the newly acquired advanced skills are recognised by education authorities, or that such training is of sufficient quality and relevance to teaching. In other words, much work remains to be done to design more effective professional development programmes as well as to incorporate them into processes that result in tangible benefits for teachers.

# Accountability

## Teacher accountability

Within policy circles, it is common to invoke the principle of accountability for teachers. The EI survey explored how teachers are held accountable in their respective education systems. We focus here on responses that indicate whether certain practices are “completely true” or “mostly true.” By far, the most frequent form of teacher accountability occurs through inspection (52% of countries judge teacher accountability entirely or mostly by inspections). The use of student test results to assess teacher accountability is reported as most common in 30% of the countries, and 31% declare this does not happen in their educational systems. A positive sign is that about 20% of the respondents state that teachers are completely trusted in their professional judgment and expertise. These countries are: Democratic Republic of Congo, Central African Republic, Sri Lanka, Malaysia, Korea, Canada (Quebec), Cyprus, Russia, France, Greece, Romania, Bulgaria, and Hungary.

Figure 21. Teacher Accountability Practices



Certainly, as professionals, teachers should be committed to their profession and the success of their students, and governments should provide the necessary resources and support for this to happen. Governments often demand accountability from teachers. On the other hand, it can be asked why accountability to function runs in only one direction: from teachers to educational authorities. Would it not also be legitimate to ask how education authorities are accountable to teachers, students, and parents? A relevant indicator here could be the investment per student in public education. UNESCO data for 2014 pose grounds for serious consideration. While in industrialised countries the average per-student spending on primary education is \$8,186 in purchase power parity terms, that investment in sub-Saharan Africa (based on 32 countries) is 3% of what

industrialised countries invest and in South Asia (based on nine countries) it is 6%. The situation for secondary education is marginally better, with expenditures per student in sub-Saharan African countries at 4% of what industrialised countries invest and 8% in South Asia (UNESCO, 2017). For country-by-country student expenditures, see Appendix 2. It should be noted that the investment of the state in education is not always known or reported with precision. A case in point is the public expenditures per student in Peru. According to Peruvian sources (MINEDU-ESCALE, 2015), those expenditures amounted to \$895 per capita for primary school and \$1,166 per capita for secondary school in 2015; according to UNESCO sources (UNESCO, 2017-18, also reporting 2015 data) the expenditures were \$1,610 per student for primary education and \$1,780 for secondary education. It is possible that the UNESCO data are reported in purchasing power parity, but the differential between the Peruvian and the UNESCO amounts is extremely high, between 53% and 79%, which casts doubt on this UNESCO statistic.

One form of accountability for teacher practices is usually based on student performance in standardised tests. Heavy use of student test results for this purpose is reported as either “completely true” or “mostly true” by 20% of the European unions. An interesting contradiction is that in many of the European countries, “teachers are trusted in their judgment and expertise”—reported by 37% of the responding unions. Since standardised tests by their very nature are designed by third parties (i.e., psychometricians and not by the teachers for their specific students), the degree of trust that teachers receive is relative.

There is another important aspect of accountability: the government’s responsibility in the provision of public education of high quality. It is unclear to what extent poor countries are able to invest in public education, even when strongly motivated. The point here is that, given the extremely modest investment per student in less industrialised countries and the array of social and cultural factors that also affect student performance, it is inaccurate to attribute student academic achievement mainly to teacher actions in the classroom. Further, supplementary data on teacher load by country indicates that the majority of countries in the world (54%) have one teacher for over 40 students. Incredibly of these countries, 27 have one teacher for 101-500 children and 9 countries have one teacher for over 500 children (GCE & EI, 2012). These statistics raise serious questions about the sincerity of many governments to offer quality education. Given the enormous differential in educational investment between wealthy and poor countries, comparisons of teacher performance across countries are meaningless.

Measuring learning outcomes without making sure the needed inputs and processes are in place is simply futile from the point of view of academic improvement and it is demoralising to the teachers who work in poorly equipped schools and without significant pedagogical support. The urban/rural divide continues to manifest itself in student access to school, to quality education, and to academic achievement and attainment (GCE & EI, 2012). This clearly suggests that measures must be in place to ensure government accountability to all sectors of society.

Accountability in terms of curriculum should also be included. UNESCO has identified human rights and gender issues, particularly comprehensive sexuality education, as subjects that should receive substantial attention. Yet, governments continue to pay lip service to human rights education. Evidence of this is that in 2016 only 28 countries submitted their national reports to UNESCO and only 7 indicated that they had integrated human rights into pre-service teacher education. However, the practices reported by training institutions seem to be better: a study of teacher training institutions in 21 countries in sub-Saharan Africa found that more than half of the countries provided comprehensive sexuality education in their pre-service programmes (UNESCO, 2016).



## **The use of teacher evaluations**

The majority of the responding teacher unions (55%) indicate that teacher evaluations have an impact on their career development, while another large group (42%) indicates that they serve to increase salary levels. Teacher evaluations are also used to assign bonuses to teachers (25%). Only in a few instances (5%) do teacher evaluations result in salary decreases; these punitive actions were reported only in Japan, Malaysia, Afghanistan, and the US. For teacher evaluations to be relevant and appropriate, teacher evaluation mechanisms should be developed with the full involvement of teachers and their unions. For example, relatively recent teacher evaluation procedures have been put in effect in Mexico with the collaboration of the teacher union for the purposes of teacher recruitment, retention, and promotion.

**Table 9. Uses of Teacher Evaluations**

Use	Percentage
To increase salary levels	7.20%
To decrease salary levels	18.60%
To give teachers a bonus or monetary reward	21.20%
To impact their career development	12.10%
Teacher evaluations are not common	11.40%
Other	11.60%

Regarding the use of teacher evaluations for the purpose of performance-related pay (PRP) in the context of higher and further education, such policies have been found to play an ambiguous role. An extensive review of the literature by Franco-Santos (2015) found that PRP pay did not produce greater motivation to engage in teaching, research, or service excellence. PRP did affect research productivity (measured by the number of papers), had a weak impact on service, and no effect on teaching quality.

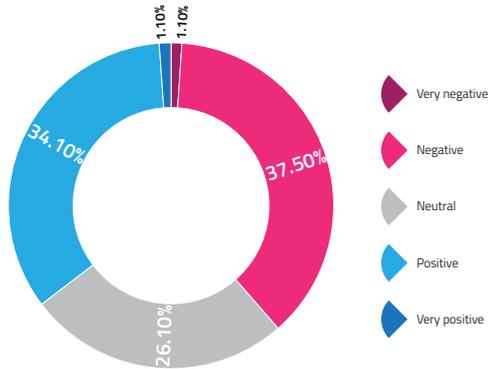
# Media view of teachers and unions

The omnipresence of contemporary mass media plays a considerable role in shaping images and conceptions of reality. It is important, therefore, to consider what images they present about teachers and teacher unions. Some EI teacher unions perceive the mass media as promoting either a negative or a very negative attitude (39%) *toward teachers*, with slightly fewer (35%) saying the attitude is either positive or very positive, and the remaining 26% considering media attitudes toward teachers to be neutral. Further, the mass media is perceived to play a much more negative, rather than positive, role in shaping images *toward teacher unions*, with 53% considering that these media play a negative or very negative role while only 18% consider the mass media to have a positive or very positive role. The substantially greater negative view of teacher unions compared to teachers suggests that some in the media have created a difference and distance between teachers and their organisations. To the extent it is possible, that misperception should be corrected.

Globally, the distinction of having the mass media present a “very positive” view of *teachers* specifically is extremely rare, as it is reported by only one country (Fiji). Likewise, a “very positive” view of *teacher unions* specifically is reported in only one country (The Gambia). Europe reports a mostly negative portrayal of teachers in the media, except in Denmark, Ireland, Armenia, Russia, Norway, Germany, Bulgaria, and Estonia. Europe also reports a negative portrayal of teacher unions, except in Switzerland, UK, Norway, Germany, and Bulgaria.

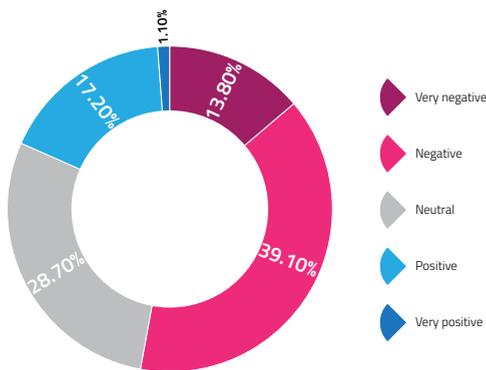


**Figure 22. Media View of Teachers**



In other regions of the world, Africa and Latin America face negative media images of both teachers and teacher unions. In Africa, negative portrayals of teachers are reported in Algeria, Niger, Kenya, Zambia, Central African Republic, Democratic Republic of Congo, and Ivory Coast. Also in Africa, negative portrayals of teacher unions are cited for Algeria, Niger, Kenya, Zambia, Benin, Morocco, Central African Republic, and Tunisia. In Latin America, negative media images of teachers as well as teacher unions are reported in Argentina, Paraguay, Peru, Brazil, and Uruguay. The widespread negative image of teachers and teacher unions across the world distorts the work done by teachers through their unions. Mexico reports improvement in media perceptions of teachers and teacher unions: while this country's low performance in PISA tests brought widespread criticism of teachers in the national press, among educational authorities there has been a gradual recognition that poor educational leadership and limited parental support of their children's education are also factors that affect academic outcomes.

**Figure 23. Media View of Teacher Unions**



# Government support of public education

Public education, to the extent that it provides a social setting in which diverse populations of students can have long, sustained, and recurrent experiences, is much needed at this time of growing social fragmentation in many countries. Primary education is most often fully funded by the government, but less so is secondary education, while higher education is identified as the level that receives less financial support by the government.

**Table 10. Provision and Regulation of Public Education by Level of Government and Level of Education, Percentages**

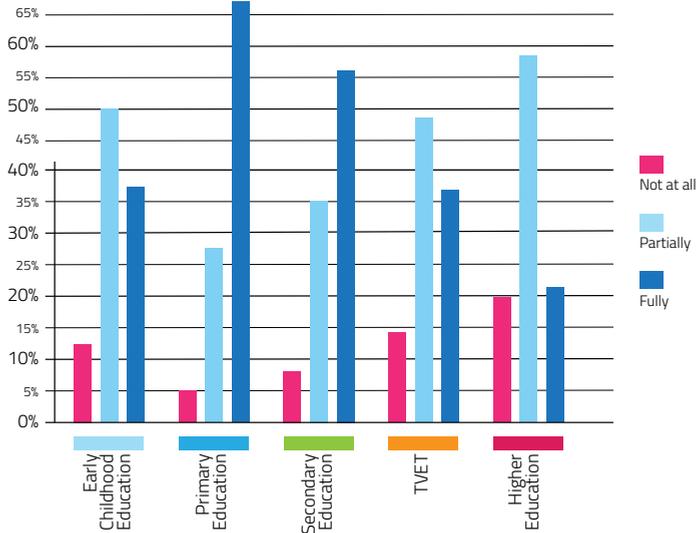
Level of Education	Central/Federal Government	Provincial/Regional Government	Local Government
Early Childhood Education	55%	17%	28%
Primary Education	65%	16%	19%
Secondary Education	71%	19%	11%
TVET	77%	18%	6%
Higher Education	82%	12%	6%

ECE remains privatised, with 38% of unions responding that ECE is fully funded by the state and 50% reporting partial government support. Despite commitment by all governments to universal free primary education, this level of schooling is reported as fully funded by only 67% of the responding unions, while 28% report that it is partially funded. The situation becomes slightly worse as the education level increases: secondary education was reported as being fully supported by 56% and partially supported by 36%; TVET receives even weaker support than primary or secondary education at 37% full support and 49% partial support—even though education ministries often cite the imperative of preparing individuals for the diverse skills needed by the economy.

Higher education emerges as the level of education that has the lowest level of full public support (22%), though it receives the highest level of partial support (59%). Government support for higher education is very modest across all regions, particularly in Africa, since only 13% of the responding unions report that higher education receives full government support and 18% in Asia/Pacific report full government support. Latin America emerges as the region with the largest proportion of unions that report free provision of higher education, as indicated by 40% of the unions. Only few European countries provide

higher education totally free of charge to students. These countries are Sweden, Hungary, Georgia, and Poland. In a small set of countries, free higher education is mandated by their constitution (e.g., Ecuador and Greece), but in reality there are always substantial student expenditures.

**Figure 24. Degree of Support by the Government by Level of Education**



The fact that on average primary education has to be paid by parents in part or totally in over one-third of the countries signals an issue of serious concern, for it readily suggests that very poor families face major difficulties in enabling their children's completion of basic education. As is well known, across the world, rates of *enrollment* in primary education tend to be close to universal levels, yet rates for primary school *completion* continue to indicate substantial disparities by social class and location (i.e., urban/rural). The situation for secondary education indicates that in about 44% of the countries represented in the EI survey parents must contribute either fully or partially to the education of their children, again a statistic that suggests many poor families are being excluded from enabling their children to gain access to secondary schooling. The countries agreeing to the Sustainable Development Goals (SDGs) have pledged themselves to both *universal* primary and secondary education. The replies from the teachers' unions participating in this EI survey suggest that gross inequalities in access, completion, and transfer to upper levels of education continue to divide social classes and ensure the reproduction of unequal life chances.

To enable universal access to primary education, India has relied on non-formal education provision since 1977. This modality of education has been delivered through community organisations (a few) and private firms (most of them) and is offered at very low cost. But a 2002 evaluation by the Government of India indicated that it was not satisfied with "the flexibility of provision, community involvement, inclusion of girls, and completion"

(Rose, 2009, p. 277). Official government data for 2005-2006 showed that “scheduled castes” and “scheduled tribes” (categories recognised in the Constitution of India referring to traditionally disadvantaged groups) were still seriously underrepresented, as the enrollment for elementary education was less than 20% among scheduled caste students and less than 10% among scheduled tribe students. These low enrollments at even the initial level of schooling indicate that a stronger governmental role will be necessary to secure universal primary education in India.

Latin America is a region in which public education tends to be provided “fully” free of charge at all levels: about 60% of the unions report that ECE coverage is completely free, 67% report it is free for primary, 60% for secondary, 60% for TVET, and 16% for higher education. In the Asia/Pacific region, free support for public ECE is low (reported to be free only by 16% of the responding unions, but on the other hand full government support for primary and secondary education is high (55% and 44%, respectively); full support for higher education is very small (11%). In Africa, among the countries participating in the EI survey, ECE is fully funded only in Algeria and Niger; primary education is fully free of charge in only a few countries (Algeria, Niger, Kenya, and Tunisia). A secondary education that is “fully free of charge” is rare in Africa, found only in Algeria, Niger, and Lesotho. TVET is also rarely provided “fully” free of charge according to the responding unions (only in Algeria, Democratic Republic of Congo, and Lesotho). Higher education is offered free of charge only in two African countries (Algeria and Lesotho). Algeria receives distinction for offering an education that is fully free of charge at all levels. As a teacher union leader in Togo observes: “The parents pay for more than 70% of the school fees, teacher salaries, the school operation, the administrative offices, the ministry’s cabinet. Nothing is free. In the cities, several public schools are more expensive than some private schools.” A union leader from the Democratic Republic of Congo adds: “Parents are solely responsible for their children’s education. The government, which organises public education, does not spend more than 13% of its budget in education.” One teacher union leader from Algeria observes: “TVET is generally private-dominated. For higher education, we have only one public university, which is fee-paying.”

As expected, the central or federal government plays the dominant role in funding and regulating public education compared to regional and local units. This support, however, is weaker than it should be given current SDG objectives for universal primary and secondary education. While provincial and regional governments play important supportive roles, it should be noted that local governments today are being asked to take on considerable financial responsibility in the provision of ECE, primary, and secondary education. Thus, they provide an average of 28% support for ECE, 20% support for primary education, and 11% support for secondary education. At first sight, local support for education should be welcome; yet, in national contexts characterised by impoverished rural areas, local support does not generally produce large revenues and, therefore, can generate dramatic inequalities in access to and quality of education within the country.

UNESCO data presented in the *Global Education Monitoring Report* (UNESCO, 2017)

indicate that more than 40% of low-income countries and about 10% of middle-income countries continue to charge fees for lower secondary schools (see also *World Development Report 2018*). If fees are charged at *lower* secondary school, it can be inferred that an even larger number of countries must be charging fees for *upper* secondary school, which makes the prospect of completing secondary school unlikely for many poor families. The percentage of partial support provided by governments reported in the EI survey does not enable us to determine to what extent this partial support translates into actual funding allocation.

Research in various developing countries has found a very strong statistical association between spending on education and country wealth (a correlation of .84). In 2013, US spent \$11,800 per full-time student; in contrast, other OECD countries, such as Mexico and Chile, spent about \$4,000 and \$5,000, respectively (US Department of Education, 2017). To be sure, financial resources are not the only factor promoting quality, but limited national resources prevent educational systems from making decisions to improve the learning process; the variety and quality of, and access to equipment; or the physical conditions of classrooms and schools.

International financial institutions and bilateral agencies have expressed strong interest in helping developing countries improve the quality of their educational systems, an outcome that would be realised by increasing their financial support of such countries. However, the reality depicts a different picture: While UNESCO estimates that there is a current financing gap of \$39 billion per year for the attainment of SDG 4 (“ensure inclusive and equitable quality education and promote learning opportunities for all”), the most recent commitments (expressed at a meeting in Dakar, 1-2 February 2018 to replenish the resources of the Global Partnership for Education, GPE) fall extremely short of what is needed to accomplish that Sustainable Development Goal. At this meeting, two-thirds of the governments promised to increase their education expenditures to 20% of their budgets, but the commitments by the bilateral and international agencies amounted to \$760 million per year, or about 2% [sic] of what is needed (Pessi, 2018; Lewin, 2018).

At the GPE replenishment conference, civil society organisations from all over the world attending the Dakar meeting expressed opposition to government plans to use unqualified teachers—an increasingly deployed strategy to deal with low education budgets. For primary education 1.7 million more teachers are needed globally. Since 1 million teachers are needed for Africa alone, the situation is particularly ominous for this region.

# Privatisation

As a staunch defender of free public education, EI has asserted this position in several documents, including EI Congress resolutions—that governments should spend at least 6% of their GDP or/and at least 20% of their national budget on public education. EI further argues that “education is a human right and a public good; it must be publicly funded and publicly regulated” (EI, 2011).

The private school system is composed of three main types of schools: not-for-profit (including religious schools), for-profit, and community schools. Private not-for-profit schools and universities have existed for many decades in most countries for reasons that include religious orientation, institutional commitment to learning, and the result of political agreements to satisfy linguistic or religious communities. What makes privatisation of great concern is the entry of corporate (global and local) actors and the proliferation of for-profit schools (usually self-described as “low-fee” schools) that, while claiming to expand the supply of schools at a low cost, are increasingly run to generate income for their owners. This basic objective tends to compromise quality (as operating expenditures are brought down as much as possible to maximise profit) at considerable costs to poor families; they also tend to exclude very poor families.

The expansion of private education is a phenomenon observable throughout the world. While about 10% of the responding teacher unions do not think it is an issue that applies to their countries, 52% report that such expansion is taking place “to some extent” and 39% consider that the expansion is taking place “to a great extent.” A breakdown of the union responses by region indicates that the expansion of private education is being felt the strongest in Africa (with 71% of the unions considering that the expansion is occurring “to a great extent”), followed by Latin America (where 57% of the unions gave the same response), and less so in Asia/Pacific (38% of the unions). Among European countries, only responding unions in France report that this expansion is occurring “to a great extent.”

The growth of the private sector is occurring through the expansion of low-fee private schools (a trend evident in developing countries), charter schools (a trend noticeable in countries such as US, UK, and Sweden), private tutoring (UNESCO, 2017), for-profit schools and universities, and the relatively recent phenomenon of virtual schools. It must be noted that the participation of the private sector in education is acceptable under current forms of market-led economies and is recognised as a parental right in the Universal Declaration of Human Rights (Article 26.c). The danger of privatisation resides in situations where: (1) commercial firms are large enough to create monopolies and thus heavily influence personnel, curricula, and school expansion decisions in the educational system; (2) for-profit schools market themselves as better than public schools, despite the existence

of ambiguous results about their effectiveness; and (3) governments abrogate their obligation to provide free quality public education for all; and (4) public-private partnership arrangements where the government effectively outsources the provision of education.

**Table 11. Expansion of Privatisation and Competitiveness at the National Level**

Type of Privatisation/ Competition	Not at all	To some extent	To a great extent
Expansion of private education institutions	10%	52%	39%
Proliferation of private tutoring	17%	58%	25%
Use of public/private partnerships	20%	66%	14%
Competition of funding between educational	28%	51%	21%

Table 12 below shows a typology of public and private providers to help understand the diversity among schools. A large variety of private provision is emerging, some of which is self-financed, but an increasing number (particularly charter schools and voucher programmes) are financed by the government—a measure that diverts funds away from government budgets assigned to public schools.

**Table 12. Typology of Public and Private Education Providers**

Private provision and private finance	Public provision and private finance
<i>Private schools, including low-fee schools</i>	<i>Public schools that charge fees or tuition</i>
<i>Home schooling</i>	<i>Individual philanthropy supporting public schools</i>
<i>Non-subsidized NGO schools, and learning centers</i>	<i>Schools supported through “corporate social responsibility”</i>
<i>Non-subsidized religious schools</i>	<i>Other private sponsorship of private schools</i>
Private provision and public finance	Public provision and public finance
<i>Vouchers in private schools</i>	<i>Government schools, without fees</i>
<i>Government subsidies or scholarships for private schools</i>	
<i>Education service contracts</i>	
<i>Private management of public schools</i>	
<i>Charter schools</i>	
<i>Community schools, religious schools, and NGO schools with government subsidies</i>	

Source: Global Campaign for Education, 2016.

Sometimes, it is not that parents select private schools for their children but that they are “forced” to do so given the perceived declining quality of public schools, and the

promotion of private schooling through a narrative developed by vested interests. In India, private schools represent a very heterogeneous sector. Nonetheless, the past 20 years have seen a large growth of low-fee private schools in that country. Regardless of the amount paid, access to private schools depends greatly on family contributions, which virtually prohibits participation of families from the poorest economic status (Harma, 2009). Again in India where many parents seek private schooling for their children, the poorest are left behind and, in the absence of even basic resources, schools are created with high proportions of students with intense learning needs that are not properly attended to (Kamat et al., 2016). Similar consequences have been detected in other countries. Parental selection of low-fee schools creates a vicious circle: parents abandon public schools, contributing to a residualisation of leaving behind the poorest families and children who will be further affected by a deepening concentration of disadvantage contributing to a downward spiral. It must be noted that in some cases private schools are providing classrooms with small sizes, less teacher absenteeism, more teaching time devoted to children, and larger school days (Smith & Baker, 2017). On the other hand, these schools are more likely to exist in wealthier communities with roads and other amenities, not in the poorest isolated areas, which means that they do not serve substantial segments of the population in low-income countries.

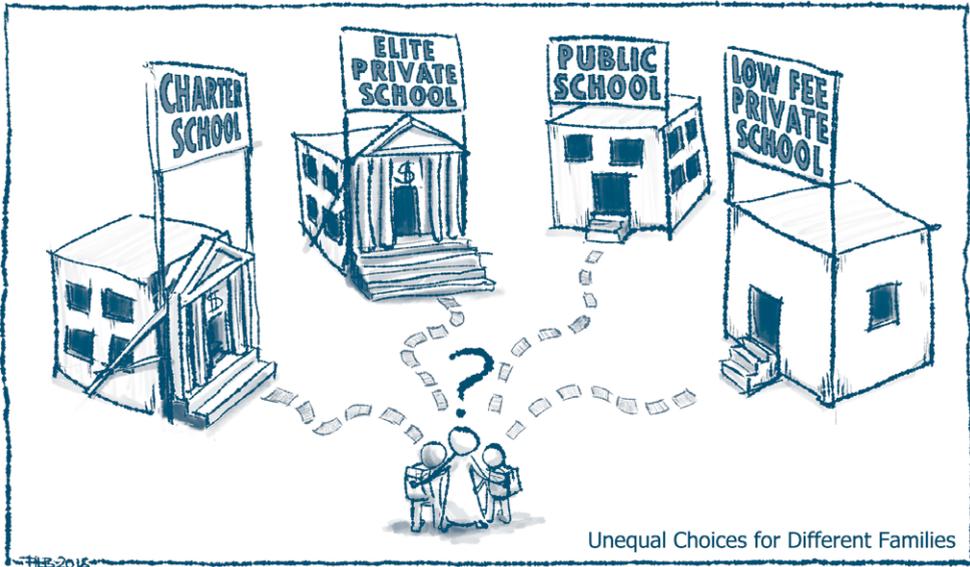
Across countries, despite a wide body of research that shows that once the socioeconomic status of students is taken into account, students in public school perform as well if not better than students in private schools, there is a growing perception among parents that public schools are of poor quality and that, in comparison, private schools are better. Low-fee private schools are now in existence in many countries, including India, Ghana, Jamaica, Kenya, Malawi, Liberia, Peru, and the Dominican Republic (Fontdevila, Marius, Balarin, & Rodriguez, 2018). Parents will enroll their children in such schools for a variety of reasons: a presumed higher quality, proximity to home, and religious or linguistic preferences. This parental choice, unfortunately contributes to an increase in social stratification as school performance is affected primarily by the students' family background—one of the most consistent research findings about factors that influence student achievement. A quantitative study of low-fee private schools in Peru found no evidence that they contribute to a higher student academic performance than public schools; in fact, public schools were found to perform better than low-fee private schools when economic conditions were taken into account, as school's performance is affected primarily by its district's wealth and thus by the families that reside in it (Fontdevila et al., 2018; see also van der Tuin & Verger, 2013). International comparisons based on PISA test scores of private and public schools have produced similar results, namely that "private schools do not perform better than public schools" (Schleicher, 2014, p.104). Additional PISA-based studies have looked at the differences between public and private schools and found no clear evidence that private schools do better after controlling for family's economic conditions—results consistently found over several years (OECD, 2012, 2014a, 2014b, 2016c). There exist, however, some non-academic distinctions between public and private schools. Iversen and Begue's (2017) study of five developing countries in Africa and

Asia found that the most significant difference in outcomes and provision between public and for-profit private schools was the availability of gender-sensitive sanitation facilities in the private schools.

While parents have a right to select private schooling for their children, this personal choice has substantial collective consequences in terms of contributing to deeper segregation and inequality. Private schooling produces greater social inequality because families that can pay can always demand improvements and extra services from their private schools that public schools cannot provide. Case studies of for-profit privatisation efforts show that this kind of privatisation fosters social segregation. According to a recent qualitative study of privatisation in five developing countries (Malawi, Mozambique, Liberia, Tanzania, and Nepal), private schools are exempt from a number of government regulations, do not comply with the existing government regulations, and have weak monitoring of their functioning by education authorities (Iversen & Begue, 2017), which raises questions about the quality of low-fee private schools. Similar observations about the limited monitoring by government of such schools have been made about Peru (Fontdevila et al., 2018). For-profit schools tend to have less qualified teachers, pay these teachers lower salaries, and hire them on a contractual basis. Research shows that up to 70% of staff employed by Bridge International Academies, one of the largest for-profit firms selling “low-fee” schools in the world, are unqualified and provided three to five weeks of training. They are to follow highly scripted instructions uploaded daily on a tablet, which creates a rigid environment with limited discretion for teachers.

In the US, a number of scholars have shown that conservative foundations are influencing governments to expand charter schools; these scholars see charters as a form of privatising public education—via the disbursement of public funds to a variety of institutions, some of which are commercial entrepreneurs (Rawls, 2013a; Fabricant & Fine, 2012). These observers also see this as a move to dismantle teacher education, as charter schools are able to hire their own teachers, some without the training of regular teacher preparation programmes. While the increase in charter schools is being advocated as the way to improve student achievement, this does not happen to any significant degree (Fabricant & Fine, 2012). Further, a study by a group called “Bolder Approach to Education” found that public schools in the US that were closed due to poor performance in standardised tests and whose students then went to charter schools produced schools with greater race- and class-based achievement gaps (Rawls, 2013b).

At present, for-profit education is one of the largest US investment markets, reaching \$1.3 billion in 2013. One way charter schools are able to generate substantial revenues for the US private sector is that, in addition to the subsidy they receive from the public sector, they can be selective (although legally they should be inclusive) about the students they admit: about 8% to 12% of the enrollment of charter schools comprises students with disabilities, compared to their enrollment of 34% in traditional public schools (Rawls, 2013b, citing a 2012 US Government report). As is well known, it is more expensive to serve students with disabilities.



Ministries of education are able to garner certain administrative advantages when they favour the privatisation of schooling. In the governmental subsidy that private schools receive, capitation grants (i.e., expenditures per student) are usually computed by taking a narrower range of expenditures than those that occur in everyday operations. Instead of calculating infrastructural expenses and calculating teacher salaries, ministries of education can simply transfer the aggregate of capitation grants to lower units (Brans, 2013). This procedure in fact amounts to outsourcing education services and paying piecemeal. For-profit schools are willing to work on the basis of capitation grants because these schools have substantial discretion to reduce costs, which they do to a large extent by hiring unlicensed/uncredentialed teachers. The consequences of this strategy are visible as statistics show that the number of uncredentialed teachers is on the increase in many countries. De Koning reports (2013) that contract teachers accounted for half or more of the teacher workforce in 10 of 13 sub-Saharan countries studied by UNESCO in 2007 (see also Brans, 2013, depicting the case of Uganda).

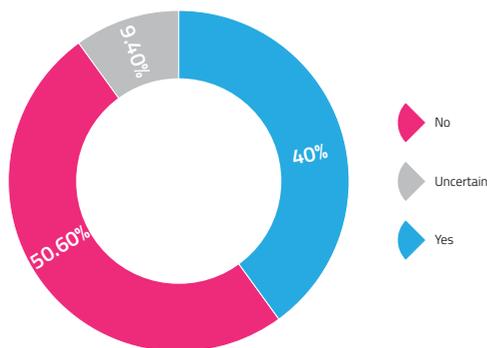
The teacher unions participating in the EI survey depict a very unregulated situation for teacher salaries in private schools as only 40% of the countries are reported to have salary regulations. The absence of such regulations is fertile ground for the underpayment and abuse of teachers. This condition provides empirical support for a statement signed by civil society organisations participating in the 2018 Dakar meeting (mentioned above), which declared that “privatisation of education represents a critical obstacle that undermines the possibilities of having democratic and egalitarian political orders.” On the positive side, private schools are being subjected to increasing government regulation

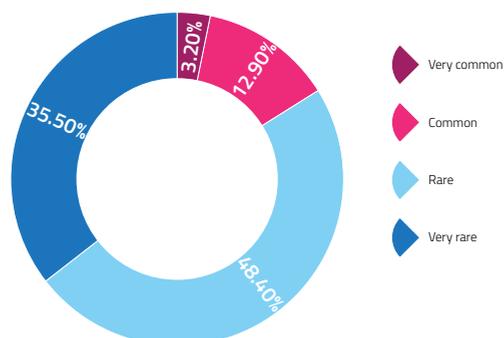
regarding teacher qualifications in their settings, as 65% of the responding EI teacher unions report that their respective national governments have such regulations.

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**Figure 25. Existence of Government Regulations Regarding Teacher Salaries in Private Schools**



**Figure 26. Existence of Regulations Regarding Teacher Qualifications in Private Schools**

The World Bank has played a significant role in the privatisation of education in the belief that markets function more efficiently than governments and nations need to reduce expenditures to reserve sufficient funds to pay their external debts. Although the World Bank declares itself to be a firm advocate of expanded access to primary and secondary education, the arm of the Bank that funds private sector ventures—the International Finance Corporation (IFC)—has been increasing support for private entrepreneurs in early childhood education to secondary schools. Thus, while IFC was putting less than 15% of its 1996-2010 investments into private education, by 2016 it was putting more than 50% into it (Smith & Baker, 2017).

## **The gender dimension in privatisation**

It has been found that among poor families, girls are less likely than boys to be enrolled in private schools (Ação Educativa et al., 2014)—a family preference that results from the daily reliance on girls' domestic labour, especially among poor and rural families, and the general undervaluation of girls and women. A study focusing on the effects of privatisation between 2010 and 2015 on girls' access to schooling in Malawi, Mozambique, Liberia, Tanzania, and Nepal (Iversen & Begue, 2017, mentioned above) found that boys are prioritised when parents have to pay for education. Although it had not been anticipated, poor regulation of this type of private school fosters lack of accountability for sexual assaults on girls by school teachers, peers, and administrators (Ação Educativa et al., 2014).

## **Tutoring as an expression of privatisation in education**

Parallel to the privatisation of schooling, there is an increasing use of private tutoring (also known as shadow education) across the world. In a sizable number of countries at least half of surveyed high school students used private tutoring, the proportion reaching its highest levels in Asian countries (UNESCO, 2017). About 17% of the teacher unions in the EI survey do not report tutoring as an issue in their country, but 58% report "moderate

growth” and 26% state that the practice is growing “to a great extent.” Intense tutorial practices exist in Korea, Hong Kong, Singapore, and Taiwan. The survey data do not enable the identification of the level of education at which tutoring is more extensive, although judging from other studies, this practice seems to be more prevalent at secondary education levels. A breakdown of the union responses by region indicates that the proliferation of tutoring continues to be greatly felt in Asia/Pacific but that Africa is also seeing an increased share.

In countries where learning is tightly measured through nationwide examinations, the number of private tutor centres is increasing. Such is the case in Turkey at the primary school level. Most often, those working as tutors are teachers who are regularly employed in public schools (Altinyelken, 2013). One reason parents invest in private tutoring, in addition to the belief (not always empirically validated) that tutoring increases student performance, is that classes are small in tutorial programmes. In all cases, tutoring represents an added expense for families; for low-income families this can represent a significant economic burden.

Linked to privatisation are new forms of cooperation in education between the government and the private sector, among which are the public-private partnership (PPPs), or forms of collaboration between ministries of education or some lower governmental unit and private firms. According to responding EI unions, PPPs are expanding to “a great extent” in 14% of the countries, to “some extent” in 66%, and “not at all” in 20% of the countries. Analysing the responses by region indicates that PPPs are very extensive in Asia/Pacific, less so in Latin America, and practically non-existent in African countries. Close to 40% of the European unions report that the use of public-private partnerships is growing to “some extent” and the UK and Slovakia unions report that this growth is happening to “a great extent.” While we know about the expansion of these partnerships, the information does not allow us to identify the types of partnerships or the levels of education most likely selected for state-private sector cooperation.

Influential financial institutions—the World Bank being among the leaders—foster the widespread expansion of private schools as part of their belief that the business sector is better prepared and motivated to deliver a good quality education than public schools. The World Bank and other financial institutions also welcome the presence of private provision of education as a way to reduce governmental expenditures on schools and teachers (World Bank, 2018). Some countries, in fact, are relying on the expansion of the private sector as a way to reach universal enrollment in primary schools and even in secondary schools, as in the case of Uganda (Brans, 2013).

## Higher education

In 2017, EI reported a membership of more than 3 million higher education and research staff in about 100 national organisations, representing about 10% of EI's membership. Thirty-one unions in this study covered the higher education sector.

While primary and secondary school teachers across the world have an average unionisation rate slightly over 50%, the unionisation of their counterparts in higher education is much lower and varies considerably across countries. The majority of organised higher education teaching personnel are located in Australia, Malaysia, Indonesia, Canada, UK, and in the US where they comprise mostly teaching personnel in community colleges. The transition by former socialist regimes to market/capitalist systems included the need to form independent unions—a process that is not always rapid; therefore, there is still a low union participation in Eastern Europe. The unionisation of higher education teaching personnel in developing countries tends to be low, except for Palestine and Lebanon. India, despite its very active political life, has low levels of unionisation of higher education teaching personnel. China exhibits a very low level of higher education unionisation.

### Legal protection of institutions

As Table 13 shows, EI teacher unions report that the autonomy of higher education institutions is protected by legal provision in most of the cases (90%). An equal proportion of unions report that faculty have the right to take part in their institution's governing body. A slightly smaller proportion of teacher unions (85%) indicate that teaching and research in their institutions is held accountable through independent accreditation. Control over their funding is also part of accreditation, albeit to a lesser degree (71%). Almost half of the higher education institutions depend on private sources of funding, which reinforces earlier findings in various parts of the world that universities—especially research-intensive institutions—are increasingly dependent on corporate sources of funding, which can influence and compromise the autonomy of teachers, researchers, and the institution. It is also of interest that, despite high faculty participation in the governance of many institutions, in only slightly over half of the cases (55%) do faculty determine their salary levels.

**Table 13. Higher Education Autonomy and Accountability**

	Yes		No	
	Count	Row %	Count	Row %
The autonomy of Higher Education Institutions is protected by legal provisions	26	89.70%	3	10.30%
Higher Education Institutions are held accountable at a national/regional level for their teaching and research through independent accreditation	23	85.20%	4	14.80%
Higher Education Institutions are held accountable at a national/regional level for their funding through independent accreditation	20	71.40%	8	28.60%
Higher Education Institutions rely on private sources of funding	13	46.40%	15	53.60%
Higher Education Institutions are responsible for determining the salaries of higher education personnel	16	55.20%	13	44.80%
Higher education teaching personnel have the right to take part in governing bodies of Higher Education Institutions	26	89.70%	3	10.30%

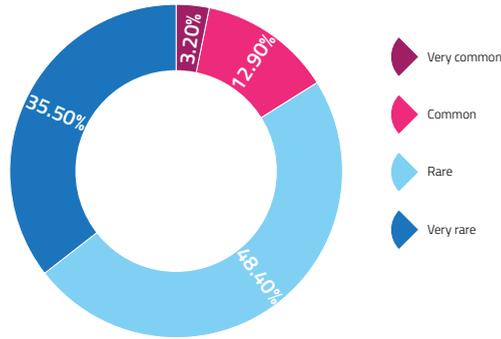
University reliance on private sources of funding is common among high-income countries. Thus, several European unions acknowledge this practice; which can be found in Switzerland, UK, Ireland, Spain, Poland, and Netherlands. Asian universities receiving private funding are reported in Afghanistan, Fiji, and Korea. Many universities in the US and Canada also count on private funding. In contrast, private funding is not reported in the cases of either Latin America or Africa. Accreditation, as noted in Table 13, has become a common practice; however, two European countries report that their universities are not accountable for teaching and research through independent accreditation: Sweden and Poland. While faculty in most universities across the world have the right to participate in their governing bodies, this reportedly does not occur in the UK, Netherlands, and Malaysia.

## **Academic freedom of higher education professors**

Globally, teacher unions serving higher education teaching personnel encounter violations of academic freedom either rarely or very rarely (84% combined), which suggests a healthy state of affairs for faculty. Among European unions, violation of academic freedom seldom occurs. However, such violations were reported to be “common” in Asia (40% of the unions reporting so) and less common in Africa and Latin America (with both reporting 25%).

One factor that seriously affects academic freedom is the preponderance of part-time employment among university professors. The Mexican teacher union response indicates that while permanent professors (half-time or more) feel confident about their academic freedom, part-time (contingent) faculty are very cautious about expressing their points of view for fear of losing their employment if such views are not welcome by the institution.

**Figure 27. Frequency of Violations of Academic Freedom**



Current developments in Turkey raise serious concern. Since the attempted coup (15 July 2016), about 8,500 academic personnel and close to 1,500 administrative staff have been permanently dismissed, most of them without fair trial.

The EI survey explored the various issues that affected academic freedom. Among the most common problem areas are the following: low government priority for research and development (reported by 52% of the unions), and industrial and corporate influences over teaching and learning (reported by 43%). The regions most affected by these two types of influence are those located in Latin America and Asia/Pacific. These findings support what several studies on the impact of globalisation on higher education have been reporting for the past two decades, namely, a rapidly growing influence by the industrial and commercial sectors on the research agendas of universities, particularly through an increased participation of corporate leaders on the governing boards of higher education institutions. Government priorities for research and development are also having a strong effect in European countries, where most violations of academic freedom are said to be imposed through government actions that set priorities for research and development. This is reported by unions in Switzerland, the UK, Ireland, Spain, Russia, Norway, Netherlands, and Germany. Consequences for academic freedom due to government-mandated priorities for research and development are reported in other parts of the world as well. In Argentina and Peru among Latin American countries; in Japan, Afghanistan, and Fiji in the Asia/Pacific region; in Canada (Quebec) in North America; and in Congo in Africa. The impact of industrial and corporate influences is also reported by unions in Argentina, Peru, Japan, Afghanistan, and in both English- and French-speaking Canada. The growing government interference in scientific fields as well as the influence of industrial/corporate sectors on universities is a common feature of globalisation, which

puts pressure on countries to become competitive in the production of technologically advanced products and consequently on universities to develop goods that can be commercialised.

*Direct* forms of attempting to restrain academic freedom occur to a much smaller degree. Thus, government censorship/repression of teaching and/or research is reported by 16% of the unions, while institutional (within the university) censorship of teaching and/or research is reported also by 16% of the unions. More unions in Latin America than in other regions report facing both governmental censorship and institutional censorship, with 50% of the unions in that region indicating such practices. EI data indicate that censorship of teaching and/or research, inadmissible as it is, is present in a number of countries.

**Table 14. Government Actions Threatening Academic Freedom**

	Yes		No	
	Count	Row %	Count	Row %
Government censorship/repression of teaching and/or research	5	16.1%	26	83.9%
Institutional/internal censorship of teaching and/or research	5	16.1%	26	83.9%
Government priorities for teaching and learning	12	38.7%	19	61.3%
Government priorities for research and development	16	51.6%	15	48.4%
Industrial/corporate influences over teaching and/or research	13	43.3%	17	56.7%

## Teaching conditions

The rapid enrollment of students in higher education taking place throughout the world has led to a noticeable increase in class size and a corresponding rise in the teaching and advising load for faculty members. Among unions that report related deterioration of conditions in higher education, those in the UK identify increased teaching loads, increased class sizes, and diminished research funding. On the positive side, one country, Slovakia, reports salary increases of about 25% for its teaching personnel. For universities in the African region, Mohamedbhai (2008) notes that faculty in some university departments have a teaching load of 18 hours per week, loads that would appear to inhibit a performance of high quality and to impede engaging in research. In Benin, teachers and university professors went on a three-month strike in early 2018—together with professionals in the health sector—to obtain better living and working conditions. Failing to resolve the dispute, the country's president retaliated by freezing all salaries until the university strikers resumed classes. No reconciliation between the two parties had taken place at the time of this writing.

## The growth of contingent faculty

Contingent faculty are those academics hired on a temporary, usually part-time basis, by institutions of higher education. Typical of this type of employment—broadly known as casualisation—are low salaries and few fringe benefits such as health insurance, pension plans, and vacations. Higher education in the US, infamously, has been identified as the leading economic sector in the employment of an increasingly contingent workforce (Henderson, Urban, Wolman, 2004). Contingent faculty are given mostly teaching responsibilities, which suggests a growing division of labour, with permanent faculty engaged in research and the teaching of students at master's and doctoral levels, and contingent faculty responsible mostly for the teaching of undergraduate students. In the US, 70% of its faculty was working under contingent status, and contingents represented 99.7% of the *instructional* staff at for-profit institutions (US GAO, 2017). Neighbouring Canada had 32% of its university faculty in fixed-term contractual arrangements already by 2005. In Europe, countries reporting high levels of casualisation in higher education are the UK, Germany, France, Austria, and Switzerland.

The rapid expansion of contingent faculty is in response to two main trends: the decreasing support of public higher education by government and the substantial growth in the number of higher education students. This is quite visible in the case of Africa, where enrollment mushroomed from 3.5 million students in 1999 to 9.5 million in 2012. Most of the faculty in African private universities are part-time or half-time. In that region also, because of the massive enrolment in public universities, there is a strong reliance on part-time faculty (Munene, 2012). Since the enrolment growth in more than 40% of the public universities has occurred without a corresponding growth in resources, the quality of education has decreased and lecturers and professors feel overburdened. One solution to limited budgets, in the eyes of the university, is to hire more part-time faculty (Fredua-Kwarteng & Kwaku Ofofo, 2018). The reliance on contingent faculty is so high in India that between 52% and 33% of permanent faculty today have not been replaced and thus those positions are formally “vacant” (Pushkar, 2018).

EI survey data for Mexico indicate that this country, in contrast with many others, is experiencing a trend toward fewer part-time positions and more full-time faculty, although most of the latter are on fixed contracts. On the other hand, Mexico also reports a frequent hiring strategy by public universities that consists of replacing one permanent faculty position with four contingent positions.

A recent study by the US Government of case studies focusing on Ohio and North Dakota public universities found that, while on average for the two institutions, 91% of the full-time tenure-track faculty had access to health benefits, the proportion for full-time contingent faculty was 83%. This proportion decreased sharply for part-time contingents, with only 8% of them having such benefits. Only 1.5% of the instructional graduate students had access to health benefits (US GAO, 2017, p. 39). Clearly, there is a strongly separated hierarchy for teaching personnel in higher education institutions



in terms of status, salaries, and benefits. The significant distinction between, on the one hand, permanent faculty (engaged in research and the teaching of students at master's and doctoral levels) enjoying satisfactory working conditions and, on the other, contingent faculty (responsible mostly for the teaching of undergraduate students) not having access to health insurance, the most basic benefit.

## **Privatisation in higher education**

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The growth of privatised tertiary institutions over the past five years is reported by 87% of the unions. According to 23% of the unions, such growth is described as "very rapid" while 40% consider this growth to be "moderate." The unions reporting "very rapid" growth are located mostly in Latin America and Africa.

# Teacher union actions

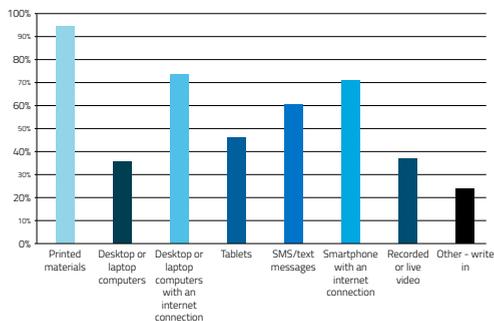
Unions exist to protect their members through collective action. Teacher unions, however, are committed to a double mission: to improve their own welfare and to work to improve the welfare of their members and to support teaching professionalism. As national democratic bodies, trade union actions must be understood within the socioeconomic context of, history and tradition of their societies, the political environment in which they function, and the means they have to communicate with their members and to build stronger, more representative organisations.

In general, teacher unions engage in collective bargaining but also in protective legislation, standards-setting, professional development of teachers, and policy recommendations regarding teacher certifications. To the extent that these unions protect teachers against situations of low pay and poor working conditions, they become active in the national political arena (Angell, 1981). The usual scope of collective bargaining covers: salary levels, health and welfare benefits, fringe benefits, leave and transfer policies, safety conditions, class size, government evaluation procedures, and union security (Angell, 1981; Bascia, 1994).

## Communications

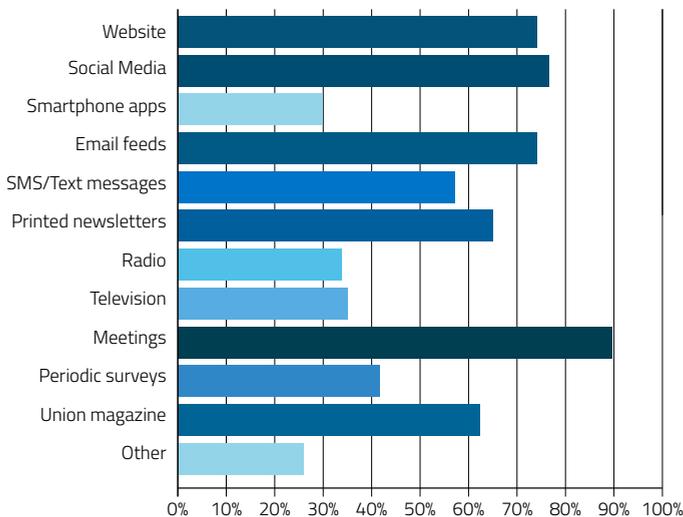
How do *teachers* access information provided by the teacher unions? The answers to this very important question indicates that it occurs mostly through access to printed materials (95%), a proportion that was high across all geographical regions. It is unclear, however, whether these materials are made available through the schools, through events organised by the union, or sent to homes through regular post. Considerable communicating also occurs via the internet. Access to the internet is through various devices, from desktops or laptops (74%), smartphones (71%) to the use of SMS/texting (61%), and tablets (46%). Surprisingly, the use of SMS/text messages and smartphones with internet connections was similarly high across all world regions, indicating a substantial penetration of ICTs throughout the world.

**Figure 28. Teachers' Ways of Accessing Union Information**



An issue of great interest is how *teacher unions* communicate with their membership. Here, the importance of the internet is also palpable, with social media, emails, or websites, each accounting for at least 74% of the means of communication. Traditional means such as meetings continue to be most frequently used (90%), followed by printed newsletters (65%) and the union magazine (62%). Mainstream media such as TV and radio are also used by one-third of the unions. Among European unions, the most common forms of communication are websites, social media (Facebook), and email. Similar patterns can be observed in the case of Asia/Pacific and North America. In Latin America, there is a preference for printed materials and internet communications via computer or smartphone. The communication patterns are similar in Africa, except for its strong emphasis on SMS/text messages.

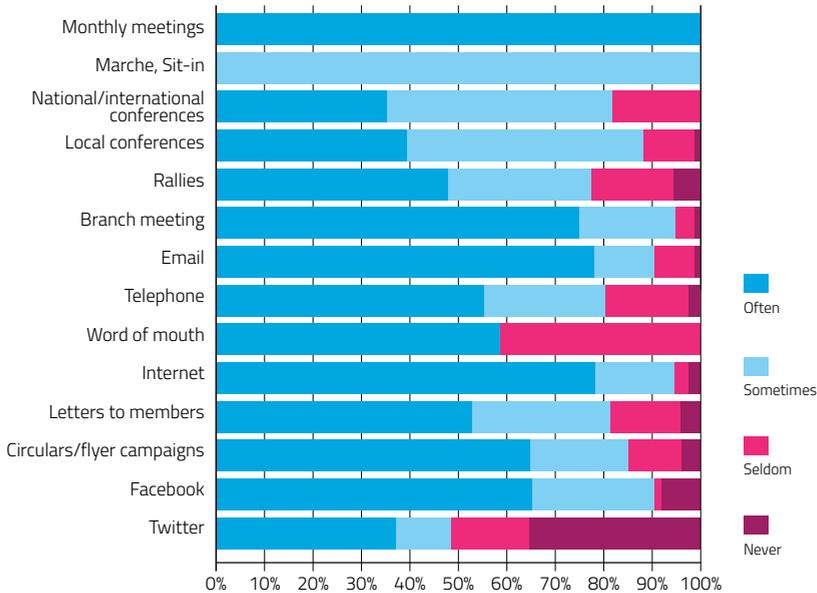
**Figure 29. Ways to Communicate Used by Teacher Unions**



When teacher unions communicate information about *particular actions and strategies in which they seek to engage*, they deploy a wide range of means. Often among these are branch meetings and Facebook (75% and 65%, respectively). Also frequent is the use of email (78%), flyers (65%), and local conferences (40%). Relatively less frequent seems to be through national/international conferences (57%) and rallies and letters (both 56%). While unions make ample use of newer information technologies, very few have developed online platforms that would permit more interactive communication. One exception is Sweden, where its teacher union reports that its website receives more than 45,000 visits per month while providing some 600 ideas as to how to improve all levels of education as well as information on extracurricular activities. In Africa, a very common way of communicating with members is via SMS/text messages. While the use of technology for communication purposes is quite high, meetings continue to be a very frequent avenue used by teacher unions to communicate with members. While teacher unions engage in

similar ways either to communicate with their members or specifically to organise them for selected actions, in the latter case the use of venues with in-person participation (e.g., branch meetings) is most commonly deployed.

**Figure 30. Ways to Communicate Used by Teacher Unions for Activism**



## Improving teaching practices

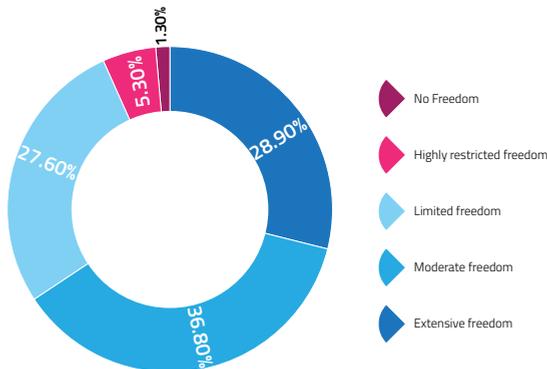
Teacher union respondents were asked to rank their desired ICT method for improving their practice—if they were to have full access to it. Their top preference was to use internet facilities for professional development to collaborate with teachers in their own school. Their second preference was to collaborate with other teachers at the national level who teach similar subjects, followed by the possibility of working collaboratively with other teachers across the world—one of the core strengths of the internet (the compression of time and space). From the perspective of the teacher unions, such international connections would be used to collaborate on pedagogical issues, to see the plans and resources other teachers have, and to find resources to connect students with peoples from different countries and cultures.

Despite their increasing reliance on the internet to communicate with members, as noted earlier, most unions (73%) have not developed—or do not have the means to develop—an internet platform to enable members to exchange news or ideas related to their professional concerns. This means that most union/teacher internet communications are unable at present to fully exploit the social media advantages of the internet.

## Freedom of expression

Freedom of expression by teachers to determine what and how to teach without interference from the government is an indispensable feature of intellectual work. According to the responding EI teacher unions, almost all higher education teaching personnel enjoy the freedom to determine what to teach without interference (97%), either fully or to some degree. However, interesting differences emerge in the degree of freedom enjoyed. A large majority of the responding teacher unions (66%) consider that teachers enjoy “extensive” or “moderate” freedom of expression without government interference. Conversely, a worrisome 28% of unions report “limited” freedom and 5% “highly restricted” freedom of expression. European unions report extensive freedom of expression, although “limited freedom” is reported by unions in Cyprus, Armenia, UK, Netherlands, and Hungary. About 54% of the unions in the Asia/Pacific region report “limited” freedom of expression but one country, Sri Lanka, reports “highly restricted” freedom and another, Fiji, reports “no freedom” of expression. “Limited freedom” of expression is reported by 37% of the African teacher unions, while Cameroon, Ivory Coast, and Algeria report experiencing “highly restricted” freedom of expression. In Latin America, Brazil reports that its teachers have “limited” freedom of expression, while Chile reports “highly restricted” freedom of expression.

**Figure 31. Teachers’ Freedom of Expression to Teach Without Interference**



## Freedom of association

Globally, “extensive freedom” is enjoyed by the majority of the teacher unions (60%) and 25% enjoy “moderate freedom.” Few unions reported “restricted freedom” (8%) or “limited freedom” (7%) or no freedom (1%). No significant differences emerge by region. According to the ILO/UNESCO Recommendation concerning the Status of Teachers, the right of association should be universally enjoyed. Fiji is the only country that reports no freedom either of expression or of association. In other Asia/Pacific countries, “highly restricted”

freedom of association is identified by Sri Lanka and India. In Africa, Cameroon and the Democratic Republic of Congo report “highly restricted freedom” of association.

The right to strike is a powerful mechanism employed by unions as a last resort during negotiations with employers. Among teacher unions this right is fully enjoyed legally by only slightly more than half (51%) of the respondents. A sizable proportion (40%) enjoys the right to strike legally only “sometimes.” Few unions (9%), however, say they have no right at all. In several countries, the right to strike is explicitly recognised in their constitutions: Morocco, Central African Republic, and Congo in Africa, and Brazil in Latin America. To prevent strikes, some governments (e.g., Argentina) are deducting the days of strike from the teachers’ salaries. An anti-strike tactic also followed by the government of Argentina consists of discrediting the strike, hiring replacements during the strike, and making additional payments to those teachers who do not join the strike, practices that have also been followed in Peru.

## **Freedom to access schools**

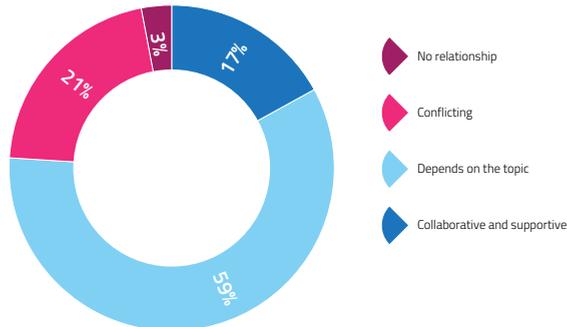
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Most unions enjoy free access to teachers in schools (61% indicate “always”). This high percentage suggests that their recruitment of new members and the distribution of written or oral information is facilitated by the government. One third of the unions, on the other hand, indicate that access to schools varies, mainly by the physical location of the schools. Only 7% report having no access to schools. Analysing the data by region reveals a significant variation in the degree of union representatives’ access to schools. All European unions, with the exception of Cyprus, report free access to schools always. While unions in Africa report that free access occurs always (67%), the proportion is lower in Latin America (43%), and lowest in Asia/Pacific (31%). In Cameroon, while the government has signed ILO Conventions 87 and 98 (freedom of association and protection of the right to organise, and the right to organise and to bargain collectively, respectively), it authorises only two unions to contact schools. The Tunisian and Ivory Coast respondents indicate that sometimes school principals refuse unions to have access to schools, especially when there are organising efforts in preparation for a strike. In some areas, union access to school is constrained by their inability to access remote areas, such as Tunisia, and Benin in Africa, and Paraguay in Latin America. Limitations to access due to school schedules are also noted by various unions.

A partial explanation for the degree of influence teacher unions have is provided by their reply to a question asking them to describe their relationship with government. Most of the time (59%), such a relationship is said to “depend on the topic,” which means that it may vary substantially. This interpretation is reinforced by the unions’ acknowledgment that their relationship with the government is almost evenly divided into “conflictive” (21%) and “collaborative and supportive” (17%). A rather large proportion of Latin American unions reports having a conflictual relationship with the government; in the cases of Asia/Pacific and Africa the relationship tends to vary according to the topic being discussed.

Several European unions report conflicting relationships with government (those in UK, Spain, Greece, and Romania). Reasons for conflict with government include the adoption of student loans in higher education, delays in scheduling negotiation tables, the lack of professional development offerings, reduction in salaries, and the absence of recruitment of permanent teachers.

**Figure 32. Types of Relationship Between the Teacher Union and the Government in the Past Five Years.**



## Areas of union/government consultation

As a whole, teacher unions considered themselves influential in shaping education policy and reforms. They rate their consultation from slightly influential (34%) and moderately influential (46%) to highly influential (18%). Several European teacher unions depict themselves as “highly influential.” They are located in Denmark, Cyprus, Ireland, Russia, Norway, UK, Portugal, and Bulgaria. Africa reports three “highly influential” unions in The Gambia, Togo, and Kenya. Latin America identifies one country as having a “highly influential” union: Argentina. No “highly influential” unions are reported in the Asian/Pacific and North American regions. The EI survey responses do not allow for the identification of the factors that account for the various degrees of union influence.

On the fundamental matter of consultation by the government with teacher unions, six major policy areas were explored by the EI survey: education policy, school organisation, pedagogical practices, curriculum development, development and selection of materials, and assessment practices. Indicating that consultation takes place “always” or “often” is identified for the areas of education policy (43%); school organisation, pedagogical practices, curriculum development, and assessment practices are identified by a third of the respondents as areas where this consultation also occurs always or often. Countries whose unions report being “always” consulted in the formulation of education policy are located primarily in Europe and Africa. The full set of such countries comprise Denmark (although less so at the higher education level), Belgium, Sweden, Ireland, Russia, Norway, Quebec, Chile, Lesotho, The Gambia, Ivory Coast, and Kenya. Not surprising, there is some overlap between a union considering itself “highly influential” and reporting “always” in consultation with government.

Globally, only 17% of the unions indicate a high level of consultation in the area of development and selection of materials. Conversely, a large number of unions report being consulted by the government “never” or “rarely” in the area of



the development and selection of materials (54%), curriculum development (44%), pedagogical practice and assessment (43% each), school organisation (33%), and education policy (29%). This limited consultation (“never” or “rarely”) is felt in the African region mostly in the areas of curriculum development and the selection of teaching materials. In Latin America all policy areas are said to suffer from infrequent government consultation with the teacher unions; it is unclear what causes the antagonistic relationship between unions and governments in Latin America, although long-standing disputes about teacher salaries might be a factor. In contrast, teacher unions in Asia/ Pacific report that consultations with government happen across all six policy areas either “sometimes” or “often.” Consultation “always” in areas of curriculum development—a crucial aspect of schooling—is reported in several European countries (Sweden, Cyprus, Ireland, Denmark, Norway, and UK) and seldom in other regions, except for Lesotho and Kenya in Africa, Uruguay in Latin America, and Canada (Quebec) in North America.

**Table 15. Degree of Union Consultation by Areas of Action, Percentages**

	Never		Rarely		Sometimes		Often		Always	
	Count	Row %	Count	Row %	Count	Row %	Count	Row %	Count	Row %
Education Policy	7	9.10%	15	19.50%	22	28.60%	20	26.00%	13	16.90%
School organisation	11	14.70%	14	18.70%	24	32.00%	19	25.30%	7	9.30%
Pedagogical practice	13	16.90%	20	26.00%	17	22.10%	19	24.70%	8	10.40%
Curriculum development	19	25.30%	14	18.70%	18	24.00%	13	17.30%	11	14.70%
Development and selection of teaching materials	25	33.30%	16	21.30%	21	28.00%	8	10.70%	5	6.70%
Assessment practices	15	20.00%	17	22.70%	19	25.30%	17	22.70%	7	9.30%

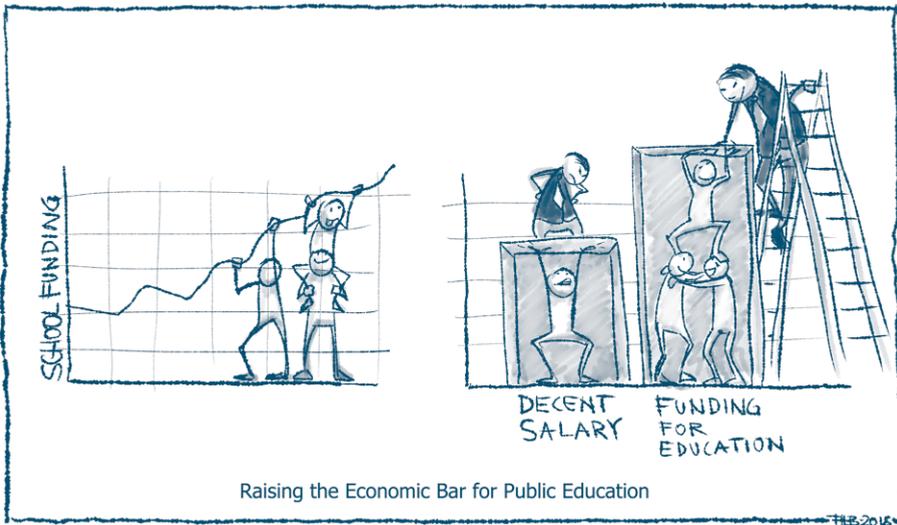
Cameroon reports that the government invites teacher unions to different processes involving the functioning of the school system (preparation for exams, evaluation of the school year) and that they enjoy monthly meetings. Morocco and the Central African Republic also report having regular meetings with the government. For their part, Morocco and Tunisia report having consultations with government regarding teacher transfers and the content of the teacher statute. Teacher unions in the Ivory Coast report the creation of a body to promote social dialogue, the Consulting Committee for National Education (Conseil Consultatif de l'Education Nationale—CCEN). Teacher unions in the Democratic Republic of Congo and Kenya indicate having salary discussions with government authorities, and Zambia indicates engaging in collective bargaining with them. The Gambia reports teacher union participation in all national statutory committees and councils of education. The situation is not positive in the Ivory Coast because, according to the union leaders, authorities see unions as excessively engaged in making demands and denouncing working/salary conditions. The Mexican teacher union reports successful negotiations resulting in the government paying for vacations of 15-20 days, offering a bonus for World Teachers Day, and creating a national system of professional development, which the union monitors and is helping to implement.

In the Asia/Pacific region, union leaders indicate that the relationship with government is affected by the political party in power, as observed by respondents from Australia, New Zealand, Fiji, and Korea. Generally, participation regarding transfers of teachers occurs in Sri Lanka, where unions also participate in changes in the curriculum and are helping in the implementation of the SDGs. Australia, in contrast, reports the federal minister has not met with the union despite repeated requests.

Latin America presents a conflicting landscape, with unions in Panama stating that the government has not complied with approved norms and failed to implement some programmes, including student scholarships. Argentina reports an “unfriendly government” that allows no participation by unions in educational policy; similar observations are made by unions in Brazil. Paraguay and Chile unions also report the existence of conflict regarding the elaboration of the education budgets, and the Chilean respondent observes that such conflict is likely to worsen.

## **Collective bargaining**

Governments allow teacher unions to engage in collective bargaining “always” in slightly more than half of the cases (53%). They allow it “sometimes, but in relation only to some negotiations” in 27% of the cases, and “sometimes, but in “very restricted ways” is reported in 9% of the cases. In 11% of the cases, unions say they do not have the right to represent their members in collective bargaining.



**Table 16. Frequency of Union Participation in Collective Agreements with Government**

Response	Yes	
	Count	Row %
Always	40	53.30%
Sometimes - But only in relation to some negotiations	20	26.70%
Sometimes - But in a very restricted way	7	9.30%
Never	8	10.70%

Only one European country union indicates “never” being able to engage in collective bargaining: Greece. But, “sometimes, but in very restricted ways” is experienced by the Netherlands and Germany. Interestingly, four other European unions (Switzerland, the UK, Spain, and France) report being allowed to engage in collective bargaining “sometimes, but only in relation to some specific areas.” Teacher unions in several African countries are not allowed to negotiate salary conditions: Cameroon, Algeria, Ivory Coast, The Gambia, and Togo. In a few countries across the world, teacher unions are “never” allowed to negotiate working conditions: Lesotho, Togo, Hungary, and Greece.

What kinds of issues are part of the bargaining process? Salaries stand foremost, being either “always” part of the negotiations (reported by 55% of the unions) or “sometimes, but in relation to some negotiations” (24%). Another top issue brought up in the negotiation process centres on working conditions: “always” in the case of 47% of the unions and “sometimes, but only in relation to some negotiations” in the case of 24% of the unions. A related issue—conditions of employment (i.e., permanent, fixed-contract, other legal arrangement)—is also common in the bargaining process, occurring “always” for 43% of the responding unions or “sometimes, but only in relation to some negotiations” according to 19% of the unions. Less often, but also a clear part of the unions’ agenda is negotiation

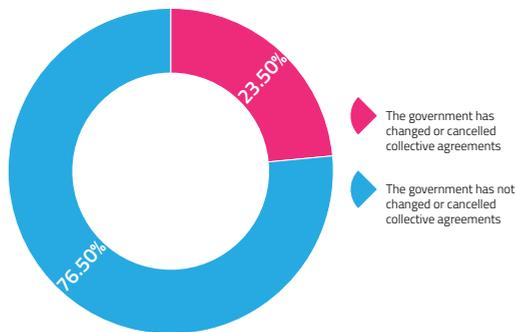
about equity and nondiscrimination; this issue emerges more as a sometimes practiced in negotiations (26%) or a sometimes practiced “sometimes, but in a very restricted way” (25%). Professional issues are also brought up for discussion by teacher unions, though they appear mostly as a “sometimes” rather than a regularly established practice.

**Table 17. Areas for Bargaining Between Unions and Government**

	<i>Always</i>		<i>Sometimes - But only in relation to some negotiations</i>		<i>Sometimes - But in a very restricted way</i>		<i>Never</i>	
	<i>Count</i>	<i>Row %</i>	<i>Count</i>	<i>Row %</i>	<i>Count</i>	<i>Row %</i>	<i>Count</i>	<i>Row %</i>
Salaries	41	55.41%	18	24.32%	7	9.46%	8	10.81%
Teachers' working conditions	35	46.67%	19	25.33%	15	20.00%	6	8.00%
Conditions of employment	31	42.47%	14	19.18%	19	26.03%	9	12.33%
Equity and non-discrimination	19	26.39%	19	26.39%	18	25.00%	16	22.22%
Professional issues	25	33.33%	20	26.67%	25	33.33%	5	6.67%

An issue of concern—in light of its crucial impact—is the rather prevalent practice of changes in or cancellations of collective agreements by the government without consulting the unions. Although 76% of the unions do not report such a government behaviour, nearly one quarter of the unions report that such incidents have occurred in the past five years. This practice can produce severe consequences for the unions’ legitimacy as representatives of education personnel or for their proposed negotiating agenda. Unions in four European countries report such cancellations (Spain, Greece, Romania, and Denmark). The predominant reason given by responding unions for such behaviour is the government’s austerity measures, which preclude consideration of salary increases.

**Figure 33. Government Changes or Cancellations of Collective Agreements Over the Past Five Years**



## Exemplary instances of union actions

A case of extraordinary success by a teacher union is the case of CONADU in Argentina, where after years of struggle it succeeded in securing a nationwide agreement by which all universities (which enjoy strong autonomy status in the country) and labour unions representing university teaching personnel agreed to standardise working conditions for their members. The various actions undertaken by CONADU appear in Box A, below.

### *Box A. The Collective Agreement for University Teachers in Argentina*

In 2015, the nation's then president, Cristina Fernández, approved the Collective Labour Agreement for teaching in the national universities of Argentina. For the first time in Latin America, sector unions and rectors reached a joint agreement that regulates working conditions and recognises labor rights for teaching in a university through an instrument that carries the force of law in Argentina—one of the founding objectives of the National Federation of University Teachers, CONADU, since its inception in 1984. Although throughout those years CONADU never stopped claiming a collective bargaining area to discuss these regulations, several factors combined to hamper the achievement of this objective, which undoubtedly represents the beginning of a new stage in the unionising of university teaching in Argentina, and constitutes a reference for the teaching struggle in universities of the region.

A decisive obstacle was the permanent financial crisis that generated in the universities the economic policy of successive governments in the universities that led to a reduction of public spending. In these circumstances, the priority of the universities could be no other than the defence of the salary. Only after the arrival of President Néstor Kirchner in 2003, was a decision made to maintain an economic policy independent of the dictates of international financial organisations, aimed at strengthening national production capacity, employment and macroeconomic variables. This decision was accompanied by heavy investment in education, and it became possible to advance the discussion of the regulation of working conditions.

This advance, however, was complicated by the principle of university autonomy. Argentine public universities are governed academically by collegiate bodies and each constituency elects its own members, who, although financially supported by national funds, administer their own budgets and regulate the employment conditions of their personnel. Following many days of debate and mobilisation in order to overcome these constraints to unity, the institutions defined their own representation in the negotiations with university rectors and agreed to adapt their bylaws to the obligations contracted collectively in the joint agreement. The pressure of the university base throughout the country should be strong enough that it convinces academic authorities of the need to respect the agreements reached at the national level.

The key element in this process was the task of raising the awareness of the university collective's membership to the situation of the working class. Those who traditionally identified themselves as a professional and academic elite began to recognise themselves as a sector of teaching work, and to value the Collective Labour Agreement as an instrument necessary for the defence of their rights.

This achievement, which allows us to carry on the struggle for continuous improvement of the conditions of our work and activities, also introduces the principle of democratisation of political relations in the university system by ensuring labour stability and regularising the recruitment of personnel, thereby establishing equality of conditions through teacher participation with the government.

A successful instance of teacher unions bringing together actors with diverse views and interests is presented below, in the case of Quebec.

### ***Box B. How to deal with neoliberalism in higher education?***

It would be easier to give in to the rise of managerial fundamentalism than to combat this trend, which is becoming more and more deeply engrained in all sectors of education. The Liberal Party of Quebec, in power for more than 15 years, has endorsed this market approach. Thus, education is gradually being replaced by a "product" that meets the needs of business firms. How to oppose or even reverse this movement? We believe that one of the solutions lies in coalition work. The Global Response (GR) to privatisation and the commodification of education, put forward by Education International, is an example of what is being done internationally. The organisation of the Estates General of Higher Education (ÉGES) in Quebec is a local example that we present below.

In 2012-2013, at the end of the great mobilisation that was the Maple Spring of 2012, the *Fédération nationale des enseignantes et enseignants du Québec* (FNEEQ) was mandated to organise the Estates General of Higher Education, with the largest coalition of partners in the university and college sectors. Since we wanted to create a broad coalition, we opted for a phased approach to bring all the partners together. Our first real test was the organisation of the "Education Space" within the World Social Forum held in Montreal in August 2016. The assessment of this event has been very positive and we have presented the ÉGES project to the partners. Although the interests were diverse, they were not incompatible and all the actors quickly recognised the importance of working together to defend higher education.

The first meeting of the ÉGES was held on May 18-20, 2017 at Laval University, Quebec City. The event was extraordinary and succeeded in attracting 500 participants. In the recent history of Quebec, there has been no similar event that was equally non-partisan, free, and open to all. EGES is organised by teacher unions, support staff

and professionals, student associations, and community groups, as well as other organisations interested in higher education. The entire event was held “open-mic”; that is to say, all participants could express themselves freely. The objectives were: (1) create a space for debate and reflection; (2) use this event to put back on the agenda some issues enjoying consensus; (3) create or strengthen links with other organisations working in higher education; (4) discuss solutions that fit our vision; and (5) develop an action plan and mobilise Quebec society.

One of the conclusions was to organise a second meeting and make it a political lever in the provincial elections of October 2018. This meeting was held on May 3-5, 2018, with representatives of the employers and political parties present. It is a rather rare event to have all those speakers in the same room. Have we been heard? The future will tell! However, the various actors in higher education have come forth and have developed common demands. This concrete approach gives a voice to the community—a new voice. We made the choice to fight and to give ourselves the means to lead our struggles.

Another accomplishment of importance is the action by the teacher union in Denmark to protect academic freedom in light of the increasing use of research for the production of goods and services for sale.

### ***Box C. Is research-based advice to ministries confidential?***

Over the last years, there has been a growing debate in Denmark about academic freedom in general and commissioned research from ministries for research-based advice and the related political process in parliament. The starting point for the general discussion is an analysis published by Danish professor Heine Andersen, the results of Terence Karran’s analysis of academic freedom in several European university systems, and consideration of the 1997 UNESCO Recommendation on the Status of Higher Education Teaching Personnel. In this analysis, Denmark occupies the unflattering ranking 24 out of 28 countries analysed.

The response from the Minister of Higher Education to these findings was that Danish universities were in the upper end of the EUA University Autonomy Index, so the level of academic freedom could not be as bad as claimed by Karran. A reality-check showed that the Autonomy Index does not present the full picture of university independence in Denmark.

The most remarkable example was introduced to the public by some journalists in collaboration with Professor Heine Andersen and the largest trade union for academics, Dansk Magisterforening (DM). The university involved was University of Aarhus, but it could have been any of the universities in Denmark as all are governed

by the same university law which has eliminated all collegiality in the governance of Danish universities and, thus, has paved the way for more focus on economy-related rather than academy-related decision-making by university boards, rectors, and deans. Along the same lines, the dominating view of many civil servants and politicians in parliament is that universities are public institutions, whose main mission is serving the policies of the government. Thus, the status and mission of universities as autonomous institutions, searching for new and improved understanding based on critical analysis of existing knowledge, has been under continued pressure. Most of the universities have by now signed contracts with ministries about research-based advice and analysis for either the ministerial role as public authority or for creating the best basis for future political negotiations and parliamentary decisions.

The essence of the Aarhus case was that the previous standard-contract for collaboration between universities and ministries was based on what became known as the “double confidentiality clause.” University researchers were not allowed to publish their results before receiving consent from the ministry, and they were not allowed to inform the public about this violation of the right to free publication of university research. In addition, the results from the university study were changed to fit better with governmental policies and the scandal that resulted led to the resignation of the responsible minister.

It is stated in Paragraph 2 of the University Law that the universities have an obligation to protect both institutional autonomy and individual academic freedom. Neither had been protected, so both the university management and the ministry were guilty of violating basic university principles. Fortunately, one of the main consequences of the pressure from DM and others has resulted in a changed wording of the standard contracts to better respect the rules of the university law and the basic principles of academic freedom.

Box D provides description of the plight of contingent faculty in India by focusing on one of the most prestigious public universities in India.

#### ***Box D. Higher education in “ad-hoc” mode: The case of Delhi University***

EI-affiliated unions in India represent mainly teachers in the primary and secondary levels of education. But they advocate for the recruitment of permanent faculty with equal pay and benefits in all sectors. Higher education unions in India have been demanding the regularisation of part-time and temporary faculty (called ad-hoc in India) in several universities with limited success so far. The central and state governments are more inclined to appoint contractual faculty, which make it easier to introduce policy changes without consulting the stakeholders while keeping labour costs low at the same time.

Delhi University is one of the most prestigious public higher education institutions in India, with more than 77 affiliated/constituent colleges serving 132,000 students in traditional ways and more than 260,000 students in non-formal (distance mode) education programs. There are three different categories of teachers in Delhi University and other higher education institutions in India with different service conditions, salaries and benefits, as follows:

1. Permanent faculty includes assistant professors, associate professor and professors, all with full benefits and good salaries. Their salaries range from US\$1,000 to \$2,500 per month, depending on their status and length of service.
2. Ad-hoc faculty are paid a monthly salary equivalent to the entry level salary of permanent assistant professor (about \$1,000 per month), but receive no annual increments and have no access to other forms of leave, such as medical, maternity, paternity, and academic leave. In many other universities the ad hoc faculty are appointed on a fixed salary that may be as low as \$400. They are expected to teach 16-18 hours a week, although the actual workload tends to be much higher.
3. Guest lecturers are paid on a per-class basis and can be appointed to teach up to 25 classes a month. They are paid \$15 for a class of one hour.

Delhi University presents a microcosm of the higher education system in India. While striving for excellence, approximately half of the teaching posts in Delhi University and its affiliated colleges are lying vacant. As a temporary measure, the posts have been filled by “ad-hoc” instructors on fixed-term contracts. In many colleges and departments these ad-hoc faculty constitute the majority as a result of retirements and related factors.

According to Delhi University rules, ad-hoc appointments can be made only in cases where the teaching vacancy exists for less than a month—a rule that has always been violated. Typically, the ad hoc faculty are appointed for a period of four months and their contract is renewed for another four months, with a one-day break in service so that their service is not continuous and thus not making them eligible to claim a permanent position according to current federal legislation. The services of the ad-hoc instructors are terminated and replaced by another ad-hoc faculty without any reason, a practice that perpetuates their vulnerability.

Though they are members of the university and college teachers’ unions, ad-hoc faculty are neither represented in union bodies nor can they voice their concerns for fear of antagonising higher authorities or the employer.

The work by teacher unions in New Zealand to guide government policies on school funding and student testing is described in Box E below.

### **Box E. New Zealand's teachers: Realising the power of collective action**

Nearly three decades ago the New Zealand education system faced major challenges. A government report titled *'Tomorrow's Schools'* put forward a range of reforms that threatened to transform New Zealand's schools from being part of a public service into a marketplace of autonomous and competing businesses. Financial and staffing decisions were to be devolved to school level and schools were to compete for students. These reforms were strikingly similar to policies presented at the same time in England (by the Thatcher government) and in the USA.

Three decades later and the picture looks quite different. Teachers in New Zealand are reaping the benefits of acting collectively and constantly making the case for public education.

Teachers in New Zealand are organised in two unions: the New Zealand Educational Institute (NZEI) represents primary teachers and the New Zealand Post Primary Teachers' Association (PPTA) represents secondary teachers. Although there are two separate unions there is no competing for the same members and the two organisations work extremely well together. When the government of the day in 2016 tried to re-introduce 'bulk funding' (a decentralised funding formula that had been introduced after *Tomorrow's Schools*, but defeated in 2000) the two unions worked together in an extraordinary display of unity. They produced joint campaign materials, organised huge joint union meetings and the two union presidents spoke side by side to the media, politicians and the public. The result was an unqualified victory for New Zealand's teachers as the government was forced to completely withdraw its proposals. Since then the government that tried to reintroduce bulk funding has been defeated and a Labour government elected. The new government quickly announced it would abandon standardised testing (so-called 'national standards') and end New Zealand's controversial system of charter schools. It has also committed to the principle that all early years educators are appropriately qualified and rejected the use of unqualified teachers in this level of schooling. More recently, the government has announced a review of *Tomorrow's Schools* to be undertaken by a panel of experts chaired by a past member of the PPTA national executive.

New Zealand teachers are not complacent. They know there are many challenges (workload and pay are significant issues) and they will remain vigilant and maintain their independence as they continue to defend and extend teacher's employment rights. But for now teachers in that country are reaping the benefits of standing by their unions and maintaining their collective strength. New Zealand unions have consistently defended their collective bargaining rights and the strength of their collective agreement ensures their voice is always heard. At the same time, the two unions have focused on engaging members and being outward looking – continually

framing the narrative about New Zealand's education as a public good and advocating for equity of access and support so that all akonga (learners) can thrive in New Zealand schools.

A significant contribution in drafting an innovative ECE policy in Denmark is presented in Box F.

### ***Box F. How BUPL Succeeded in Influencing a Revision of the Danish ECE Curriculum***

Since July 2018 a new revised and stronger pedagogical curriculum on early childhood education is in force in Denmark. It is a curriculum based upon respect for professional knowledge and autonomy. It is also a curriculum built upon a holistic learning environment celebrating the importance of children's play, well-being, and perspectives. This is a significant result given that the pervading focus at the start of the process was employability, fixed learning targets, and school readiness, which was an approach favouring private companies offering edutainment, early formal literacy and numeracy, and prescribed learning models.

The Danish Union of Early Childhood and Youth Educators (BUPL) encouraged the Ministry of Education, employers, parliamentary parties, and other stakeholders to appoint a commission to draw up a common understanding of the pedagogical foundation and frame as the basis for a revised curriculum for early childhood centers.

A Master Group was established in 2016 with experts and social partners including BUPL. In a short time the Master Group finished a report with a proposal for a pedagogical foundation and frame for the future, elaborating the themes in a curriculum with few but comprehensive educational aims directed at the learning environment of ECE centres.

The Master Group expressed in the report common views regarding the importance of play, children's togetherness as well as the importance of the learning environment to children's curiosity, experimentation, self esteem and creativity. These views are to be included in six revised themes of the pedagogical curriculum. Following the Master Group's report, working groups were formed with experts and early childhood educators with whom BUPL collaborated.

The result is that ECE centers (serving 0-5 year-old children) have these themes to include in their educational practice:

- Comprehensive personal development
- Communication and language
- Body, senses, and motion
- Culture, aesthetics, and togetherness



- Nature, out-door life, and science
- Social development

The report and proposals of themes were incorporated in a revised act on early childhood education passed by the Parliament in May 2018. The ECE centres have the next two years to implement the stronger pedagogical curriculum. Educators have the professional autonomy to decide how to implement the curriculum, which is now based at every center as a professional task.

At the same time, BUPL succeeded in persuading the Parliament to invest money into continuous professional development in order to implement the new curriculum and also to provide funds for a better child-staff ratio in ECE centres serving children with special needs.

In all, this has been a good step forward for the status of ECE educators, the teachers' union, and the right of children to a childhood of higher quality.

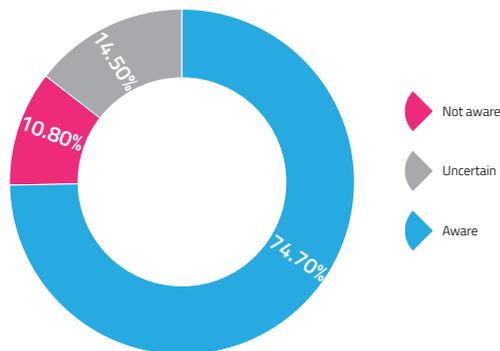
# International norms, rights, and protection

Over the past five decades, the teachers' union movement, in cooperation with UNESCO and ILO, has succeeded in having international norms agreed upon by the large majority of countries. Two instruments, one covering primary and secondary education, and another covering higher education, establish norms to protect the status and conditions of teachers throughout the world. Both documents were path-breaking as they set specific norms concerning the responsibility of educational institutions as well as the rights and responsibilities of those teaching in them. These documents have served as powerful tools in advocating and drafting national legislation to protect teacher conditions as well as to increase their levels of professionalism.



The document guiding the status and conditions of primary and secondary school teachers is the *ILO/UNESCO Recommendation concerning the Status of Teachers*, enacted in 1966. The document concerning the status and conditions of those teaching in higher education is the *UNESCO Recommendation concerning the Status of Higher Education Personnel*, enacted in 1997. These normative instruments are complemented by the ILO policy guidelines on the promotion of decent work for early childhood education personnel, adopted by the ILO Governing Board in 2014.

**Figure 34. Unions' Knowledge of the ILO/UNESCO Recommendation Concerning the Status of Teachers (1996)**

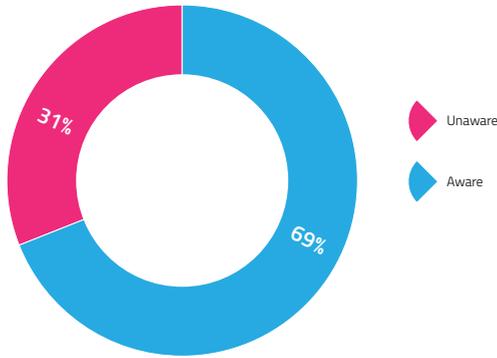


After over 50 years of existence, 75% of the EI unions in the study declare they are aware of the ILO/UNESCO Recommendation concerning *teachers*, although 10% still do not know it, and a surprising 15% is “uncertain.” The knowledge of this recommendation varies by region. Among European unions, 48% indicate that they know the document. Of those who expressed familiarity with this document, 73% reported that it had been valuable while 11% felt it had not been useful and a sizable 16% was “uncertain” of its usefulness. Nonetheless, the ILO/UNESCO Recommendations have been used extensively for the following purposes:

- To request reasonable class sizes and working conditions (Cameroon, Burkina Faso, and Fiji)
- To request better salaries (Morocco, Democratic Republic of Congo, and Congo)
- To guide the struggle for the rights and responsibilities of teachers (Sri Lanka and Afghanistan)
- To promote more coherent teacher, inspector, and principal recruitment (Tunisia)
- To formulate the union’s policy (Russia)
- As a tool for lobbying for education (Denmark, the Netherlands, and Romania)
- As a referent in crafting responses to educational policies proposed by government (UK)
- In negotiations with governments (Niger, Kenya, Morocco, Zambia, The Gambia, Argentina, and Malaysia)
- In efforts to adopt a career ladder (Ivory Coast)
- In teacher workshops and conferences (Niger, Lesotho, and Australia)
- To defend teachers’ freedom of expression (Burkina Faso and Algeria)
- To struggle against the violation of union rights (Ivory Coast)
- To develop a professional code of ethics (India) and consider ethical issues (Kenya and Zambia)
- As a key referent for the drafting the teachers’ statute, approved in 2001 (Paraguay)

The other document, concerning exclusively *teaching personnel in higher education institutions* (*UNESCO Recommendation concerning the Status of Higher Education Teaching Personnel*), is known by over two-thirds (69%) of the responding EI teacher unions representing higher education institutions, which means that one-third—after 20 years of its existence—are unaware of it. Among those unions that assert awareness of the UNESCO Recommendation, 68% report that it has been helpful to their work, while 5% consider it of no assistance. Surprisingly, 26% of those unions that know the document declare themselves “uncertain” of its value to them.

**Figure 35. Unions' Knowledge of the UNESCO Recommendations Concerning the Status of Higher Education Teaching Personnel**



Applications of the UNESCO 1997 Recommendation by the EI unions include the following:

- In negotiations to improve working and salary conditions (the Democratic Republic of Congo, Congo, Burkina Faso, and Argentina)
- In demands for greater union participation in decision-making (Afghanistan)
- To support arguments for scholarship workshops (Lesotho)
- As a guide to talk to union members (Malaysia)
- Using it to provide initial and continuing training (Afghanistan)
- As a guide to policy development skills (Korea)
- To defend the freedom of lecturers at universities to join the union (Fiji)
- To advocate security of tenure and proper disciplinary procedures (Afghanistan)
- To explain conditions for effective teaching and learning (Afghanistan)
- As a framework that higher education institutions must adhere to (Fiji)

In total, the ILO/UNESCO Recommendation addressing teachers seems to be better known than the UNESCO Recommendation addressing higher education teaching personnel. Both documents are reported to have provided key content that could be used in negotiations with governments and as a referent to provide training to labour union leaders and teachers in general. However, the fact that one-third of the unions still do not know of these documents should be of concern.

# Conclusions and policy implications

Teacher unions are complex organisations, with great diversity in size, financial resources, and in the ability to mobilise and influence public policy. Through their work they accumulate experiences that produce fundamental knowledge and perceptions about the education system and the challenges to its desirable functioning. This EI survey signals a number of critical points affecting teacher conditions and performance as well as union actions. There are several worrisome trends affecting the teaching profession. They include: (1) the increasing number of unqualified teachers across the world; (2) the decreasing level of teacher supply as many persons are not interested in teaching; (3) the significant teacher shortage across the world, particularly in secondary education; (4) the changing legal status of teachers and university teaching personnel, from stable employment to fixed-term contracts and part-time positions; (5) the diminishing level of support for public education; and (6) the expansion of privatisation in/of education. These trends are visible throughout the world and are highly likely to affect negatively the quality of education and the professionalism of the teaching force. These trends continue and deepen the concerns EI reported in its previous survey (2015) examining the status of teachers and the teaching profession (Symeonidis, 2015). The current EI findings further confirm observations made by the Incheon Declaration and Education 2030 Framework for Action (2015) regarding teacher shortages. This document observed that by 2030, some 2.3 million new teachers would be needed to achieve universal primary education and about 5.1 million to achieve universal lower secondary education. The Incheon Declaration further observed “growing trends to have unprepared non-professionals” and the “absence and inadequacy of continuous professional development.” Updated statistics by UIS (2016) now indicate that 69 million teachers will be needed to achieve quality primary and secondary education by 2030. To the extent that these conditions have become chronic, the prognosis does not bode well for the teaching profession throughout the world.

Governments' support for education is modest. While primary education receives the highest level of state support, public funds decrease substantially at secondary levels and they provide very small support at the higher education level. The fundamental problem, however, does not reside in the distribution of the education budget, but in the proportion of the national budget allocated to education. The insufficient support of public education is giving rise to the widespread emergence of private schools and universities. For-profit privatisation of education is moving at a fast pace, accompanied by deregulated teacher salaries in the private sector, which might be leading to salary stagnation among teachers in private schools. However, several unions consider that there is a positive trend toward greater monitoring by government of teacher qualifications in private schools.

It is worth noting that the negative changes in the educational labour force are being noticed by other social actors. For instance, graduate students in Europe—many of whom will become leaders of society in their countries—have expressed an explicit position in favour of teachers, by stating:

**Teachers are at the core of quality education. Today more is expected from teachers than ever before. This requires a genuine supportive environment for teachers and academics, including attractive working conditions, continuous professional development and specialised training in addressing diverse student populations, and sufficient preparation time (EI, OBESSU, & European Students' Union, 2016).**

Teaching personnel in higher education institutions are being affected negatively through the increasing casualisation of labour. The parallel development at lower levels of education is happening through the decreasing proportion of teachers with civil status and the growth of those with either fixed-term contracts or other forms of contractual arrangements.

Impediments to enhancing teacher professionalism are common, especially in less industrialised countries. These obstacles range from relying increasingly on teachers with low qualifications and not offering a salary competitive enough to attract and retain the most talented people, to insufficient and often inaccessible professional development. The data from the responding EI unions reveal a considerable distance between governments' rhetoric to offer a public school of high quality and the prevailing reality. Taking into consideration that most teachers receive low salaries, it would be critical for educational authorities to provide this training free of charge or with minimal payments by teachers.

A slogan adopted by a successful Indian grassroots group encourages us to think of “ways to move from grief to action; ways to move from coping to change.” These words present a welcome challenge to be both proactive and optimistic. Several policy implications of the teacher and teacher union conditions and practices found in this report follow below. Some of these implications are aimed at improving governments' policies and programmes in education; other implications are oriented toward teacher union renewal. We offer these policy implications for unions to consider in the belief that self-improvement should always be part of present and future institutional action.

## **Policy implications for governments**

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EI insists on social dialogue in the continuous effort to improve the educational system—a dialogue that engages the hiring authorities, public authorities and employees (EI, 2011). Such a dialogue requires initiating and maintaining regular contact between the teacher union and the ministry of education in the case of unitary/federal structures or between the union and regional authorities in the case of decentralised systems.

Emerging as two urgent issues concerning teachers is the increasing numbers of unqualified teachers hired to teach in public education systems and, conversely, the decreasing numbers of teachers graduating from teacher education institutions, which is linked to the low appeal of teaching as a profession and the subsequent shortage of teachers in important disciplines. Governments, therefore, should take action to ensure a high-quality teaching force, well prepared to implement the official curricula. A very useful step they can take in this direction is to collect and make readily available national statistics on the proportion of teachers who do not possess even the minimum teaching qualifications. These statistics should serve as a basis for joint planning by teacher unions and ministries of education to determine professional development activities for teachers in mathematics and science, for example, as identified by teacher unions in this EI survey. Statistics on teacher qualification levels would also serve to more effectively plan the expansion of teacher education programs and the institutional capacity for creating continuous development programs. All of this would facilitate the efforts of educational systems to increase the pool of potential teachers and ensure the selection, preparation, and retention of qualified teachers.

Also of concern—and hence in need of satisfactory government response—is the changing legal status of teachers. The reduction in permanent employment status and the proliferation of temporary and part-time employment is a trend visible throughout the world and a significant factor in the shift of teaching to a very vulnerable profession, forcing current and future teachers to consider alternative forms of employment that provide greater stability. At the higher education level, many teacher unions report an increasing hiring of contingent faculty, which is reaching the level of precarious conditions in some universities.

As noted in this EI study, teacher shortages constitute one of the major challenges facing the education system throughout the world, even when variations by geographic region and subject matter are acknowledged. These shortages lead to large class sizes that further compound the difficulty of serving diverse student populations. The teaching profession is experiencing shortages because of a two-fold problem: the expansion of teacher education programmes has been slow compared to the demand for trained teachers, and some governments have shown limited willingness to recruit graduates from teacher education programmes into the public school system. These twin and mutually reinforcing problems would benefit from intense and immediate government response.

Governments are responsible for the high quality of their teaching labour force and should provide fully-funded continuous professional development for teachers and higher education teaching personnel, as stated in the 1966 ILO/UNESCO and the UNESCO 1997 Recommendations. Teacher unions should continue to press ministries of education for their support in developing higher levels of professionalism. Where capacity and resourcing exists, teacher unions should engage in the provision of continuous professional development and provide governments with examples of successful programmes to improve the professionalism of teachers.

The quality of the teaching force in any country is crucial and efforts should be made to keep it at high levels. According to the teacher unions, actions to improve teacher status have to consider the improvement of collective bargaining and to grant teachers more autonomy.

Governments must consider increasing the funding budgeted for public education and re-evaluating the distribution of these resources to ensure a teaching force that can dedicate its time and effort to the diverse and complex educational environments in which they function. The fulfillment of SDG 4 and its multiple targets makes the provision of a larger education budget indispensable.

Teachers are often criticised when they demand improvement of their working conditions, as some people consider that such a petition is antithetical to professionalism (Stevenson, 2017). The fact that these demands do not go away and that they not infrequently turn into strikes should give policy makers grounds for reflection. One useful response is for policy makers to create structures that enable teachers to participate in social dialogues and thus be part of the solution (Stevenson, 2017).

The growth of the private sector is occurring through the expansion of low-fee private schools (a trend evident in developing countries), charter schools (a trend noticeable in countries such as US, UK, and Sweden), private tutoring, for-profit schools and universities, and the relatively recent phenomenon of virtual schools. The dangers of privatisation are many, but are often most serious where: (1) commercial firms are large enough to create monopolies and thus heavily influence personnel, curricula, and school expansion decisions in the educational system; (2) for-profit schools market themselves as better than public schools, despite the existence of ambiguous results about their effectiveness; (3) governments abrogate their obligation to provide free quality public education for all; and (4) public-private partnership arrangements where the government effectively outsources the provision of education. In light of the growing for-profit corporate role, including privatisation of and in education, governments should closely monitor and regulate their operations and insist on the respect of the right to free quality education for all and for teacher rights and conditions.

## **Implications for union actions**

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As noted earlier, collecting better statistics about the qualifications of teachers in the national teaching labour force serves as an indispensable point of departure for useful proactive action. In addition, it is highly advised to conduct studies of the various factors that lead to effective teacher recruitment and those that exacerbate the problem of teacher attrition and absenteeism, with special emphasis on understanding the specificity of urban and rural contexts.

Codes of professional conduct or ethics should not be imposed on teachers from outside. They are part of protecting the profession and its autonomy and assuring appropriate

standards for it. As indicated in the 1966 ILO/UNESCO Recommendation, that role is best played by teachers through their organisations. Such standards will also contribute to the development of a higher status for teaching as a profession. A number of teacher unions have developed such codes. Efforts are being made to develop global consensus in this area. EI and UNESCO are currently developing a global framework for professional standards to enable countries to develop their own; this resource will be available in the near future.

Teacher unions should continue to consider gender in their structures (e.g., women's committees, gender committees) to foster/ensure explicit participation of women in curriculum and education policy committees. In many respects, teacher unions should publicise the fact that most often the majority of teachers are women and recognise the need for their greater representation in positions of union leadership.

Teacher unions should conduct more proactive efforts to make the UNESCO/ILO and UNESCO statements on the teaching profession better known since these documents have shown their usefulness (as noted above) in diverse countries.

Teacher unions should consider qualitative studies of the causes for the varying levels of teacher union influence on national educational policies and related decision-making. The unions should study which factors are conducive to "collaborative and supportive" relationships between unions and government. Details about how conflicts were resolved in those situations, the frequency of their meetings and the venues for such encounters, and the historical trajectory of negotiations between both parties should produce useful insights that might well be considered by other unions and governments. The conducting of qualitative studies could also help provide a greater understanding of how different unions interpret such concepts as "evaluation," "civil status," "professionalism," and "successful union activities."

Finally, teacher unions should at all times keep in mind the principles endorsed at the time of the foundation of EI, including the notion that the improvement of public schools and education quality is a major concern of trade unions and thus, as argued by Albert Shanker, visionary union leader and former president of the International Federation of Free Teachers' Union (cited in Chenoweth, 1988, p. 87): "We [teacher unions and organisations] must develop our reform ideas and proposals, rather than wait for others to present theirs and then have to respond defensively."

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# Appendices

## Appendix 1

### Teacher Unions Participating in the Study

<b>Education Sector Key</b>	<b>PE</b>	<i>Primary Education</i>
	<b>HE</b>	<i>Higher Education</i>
	<b>LSE</b>	<i>Lower Secondary Education</i>
	<b>USE</b>	<i>Upper Secondary Education</i>
	<b>TVET</b>	<i>Technical Vocational Education Training</i>
	<b>ECE</b>	<i>Early Childhood Education</i>
	<b>ESP</b>	<i>Education Support Personnel</i>

### Overview of respondents

<i>Region Africa</i>			
<i>Country</i>	<i>Organisation Name</i>	<i>Education Sector</i>	<i>Membership Size</i>
Gambia	<i>The Gambia Teachers Union (GTU)</i>	<i>ECE, LSE, USE, HE, ESP</i>	11676
Kenya	<i>Kenya National Union of Teachers (KNUT)</i>	<i>ECE, PE, LSE, USE, PVET</i>	194418
Lesotho	<i>Lesotho Association of Teachers (LAT)</i>	<i>ECE, PE, LSE, USE, TVET, HE</i>	4500
Zambia	<i>Zambia National Union of Teachers (ZNUT)</i>	<i>ECE, PE, LSE, USE</i>	41210
Algeria	<i>Syndicat National Autonome des Professeurs d'Enseignement Secondaire et Technique (SNAPEST)</i>	<i>USE</i>	15250
Benin	<i>Syndicat National des Enseignants des Ecoles Maternelles du Benin (SYNAEM)</i>	<i>ECE</i>	3710
Burkina Faso	<i>Syndicat National des Enseignants du Secondaire et du Supérieur (SNESS)</i>	<i>LSE, USE, TVET, HE</i>	3500
Cameroon	<i>Fédération Camerounaise des Syndicats de l'Education (FECASE)</i>	<i>ECE, PE, LSE, USE, TVET</i>	2450
Central Africa	<i>Syndicat National des Enseignants Autonomes de Centrafrique (SYNEAC)</i>	<i>PE, LSE, USE, ESP</i>	1024
Democratic Republic of the Congo	<i>Fédération des Travailleurs de la Science, des Sports, de l'Enseignement, de l'Information et de la Culture (FETRASSEIC)</i>	<i>ECE, PE, LSE, USE, TVET, HE</i>	7600
Democratic Republic of the Congo	<i>Fédération Nationale des Enseignants et Educateurs sociaux du Congo (FENECSO)</i>	<i>ECE, PE, LSE, USE, TVET, HE</i>	10102
Democratic Republic of the Congo	<i>Syndicat des Enseignants du Congo (SYECO)</i>	<i>ECE, PE, USE, TVET, HE, ESP</i>	270000
Ivory Coast	<i>Syndicat National des Enseignants d'Education Permanente de Côte d'Ivoire (SYNADEEPCI)</i>	<i>PE, LSE</i>	2500

<b>Region Africa</b>			
Country	Organisation Name	Education Sector	Membership Size
Ivory Coast	<i>Syndicat National des Enseignants du Second Degré de Côte d'Ivoire (SYNESCI)</i>	LSE, USE	11787
Ivory Coast	<i>Syndicat National des Formateurs de l'Enseignement Technique et de la Formation Professionnelle (SYNAFETP-CI)</i>	TVET	2000
Morocco	<i>Syndicat National de l'enseignement / Confédération Démocratique du Travail (SNE-CDT)</i>	PE, LSE, USE, TVET	17000
Niger	<i>Syndicat National des Enseignants du Niger (SNE)</i>	ECE, PE, LSE, USE, TVET	34678
Togo	<i>Fédération des Syndicats de l'Education Nationale (FESEN)</i>	ECE, PE, LSE, USE, TVET, ESP	15030
Tunisia	<i>Fédération Générale de l'Enseignement de Base (FGEB)</i>	PE	58000

<b>Region Asia-Pacific</b>			
Country	Organisation Name	Education Sector	Membership Size
Afghanistan	<i>Afghan Teachers Social Support Association (ATSA)</i>	PE, ECE, LSE, USE, TVET, HE, ESP	1700
Australia	<i>Australian Education Union (AEU)</i>	ECE, PE, LSE, USE, TVET, ESP	187374
Australia	<i>Independent Education Union of Australia (IEU)</i>	ECE, PE, LASE, USE, TVET, ESP	72000
Fiji	<i>Fiji Teachers' Union (FTU)</i>	PE, LSE, USE, TVET, HE, ESP	4980
India	<i>All India Primary Teachers' Federation (AIPTF)</i>	PE	2210178
Japan	<i>Japan Teachers' Union (JTU)</i>	ECE, PE, LSE, USE, TVET, ESP, HE	186546
Korea	<i>Korean Federation of Teachers' Associations (KFTA)</i>	PE, ECE, LSE, USE, TVET, HE	161000
Malaysia	<i>Malaysian Academics Movement (MOVE)</i>	HE	800
Malaysia	<i>Sarawak Teachers' Union (STU-Sarawak/Malaysia)</i>	ECE, PE, LSE, USE, TVET	18000
New Zealand	<i>New Zealand Educational Institute Te Riu Roa (NZEI Te Riu Roa)</i>	ECE, PE, ESP	46208
New Zealand	<i>New Zealand Post Primary Teachers' Association (NZPPTA)</i>	LSE, USE	17000
Sri Lanka	<i>All Ceylon Union Of English Teachers (ACUET)</i>	PE, LSE, USE, ESP	2455
Sri Lanka	<i>Union of Sri Lanka Teachers' Solidarity (USLTS)</i>	ECE, PE, ESP, USE	4408

<b>Region Europe</b>			
Country	Organisation Name	Education Sector	Membership Size
Armenia		ECE, PE, LSE, USE, TVET, ESP	52200
Belgium	<i>Christelijk Onderwijzersverbond (COV)</i>	ECE, PE, ESP	30900

<b>Region Europe</b>			
<i>Country</i>	<i>Organisation Name</i>	<i>Education Sector</i>	<i>Membership Size</i>
Bulgaria	<i>Bulgarian Union of Teachers (SEB)</i>	<i>ECE, PE, LSE, USE, TVET</i>	<i>72000</i>
Cyprus	<i>Cyprus Turkish Teachers' Trade Union (KTÖS)</i>	<i>ECE, PE</i>	<i>2085</i>
Cyprus	<i>Organisation of Secondary School Teachers of Cyprus (OELMEK)</i>	<i>HE</i>	<i>6000</i>
Denmark	<i>Danish Union of Teachers (DLF)</i>	<i>PE</i>	<i>60466</i>
Denmark	<i>Gymnasieskolernes Laererforening (GL)</i>	<i>USE</i>	<i>13000</i>
Denmark	<i>The Danish National Federation of Early Childhood and Youth Educators (BUPL)</i>	<i>ECE, PE</i>	<i>51000</i>
Estonia	<i>Federation of the Estonian Universities, Institutions of Science, Research and Development (UNIVERSITAS)</i>	<i>HE, ESP</i>	<i>700</i>
Georgia	<i>Educators and Scientists Free Trade Union of Georgia (ESFTUG)</i>	<i>ECE, PE, LSE, USE, HE, ESP</i>	<i>40000</i>
Germany	<i>Gewerkschaft Erziehung und Wissenschaft (GEW)</i>	<i>TVET, HE</i>	<i>278000</i>
Greece	<i>Greek Federation of Secondary Education Public School Teachers (OLME)</i>	<i>LSE, USE, TVET</i>	<i>15000</i>
Greece	<i>Greek Primary Teachers' Federation (DOE)</i>	<i>ECE, PE</i>	<i>20325</i>
Hungary	<i>Keresztény Pedagógusok Szakszervezete (KPSZ-KPT)/Workers Councils' Teacher Branch</i>	<i>ECE, PE, LSE, USE, TVET, HE,ESP</i>	<i>100</i>
Hungary	<i>Syndicat des Enseignants de Hongrie (SEH)/ Syndicat des Enseignants de Hongrie (SEH)</i>	<i>ECE, PE, LSE, USE, TVET</i>	<i>27000</i>
Ireland	<i>Irish National Teachers Organisation (INTO)</i>	<i>PE</i>	<i>36000</i>
Ireland	<i>Teachers' Union of Ireland (TUI)</i>	<i>LSE, USE, TVET, HE</i>	<i>17000</i>
Montenegro	<i>Trade Union of Education of Montenegro (TUEM)</i>	<i>ECE, PE, LSE, USE, TVET, ESP</i>	<i>10500</i>
Netherlands	<i>Algemene Onderwijsbond (AOb)</i>	<i>PE, LSE, USE, TVET, HE, ESP</i>	<i>83406</i>
Norway	<i>Union of Education Norway (UEN)</i>	<i>ECE, PE, LSE, USE, TVET, ESP, HE</i>	<i>175161</i>
Poland	<i>Związek Nauczycielstwa Polskiego (ZNP)</i>	<i>ECE, PE, LSE, USE, PVET, ESP, HE</i>	<i>200000</i>
Romania	<i>Federatia Sindicatelor Libere din Invatamant (FSLI)/ Fédération des Syndicats Libres de l'Enseignement</i>	<i>ECE, PE, LSE, USE, TVET, ESP</i>	<i>175000</i>
Russia	<i>Education and Science Employees' Union of Russia (ESEUR)</i>	<i>ECE, PE, LSE, USE, TVET, ESP, HE</i>	<i>4199736</i>
Slovakia	<i>Trade Union of Workers in Education and Science of Slovakia (OZPŠaV)</i>	<i>ECE, PE, LSE, USE, TVET, ESP, HE</i>	<i>21172</i>
Sweden	<i>Lärarförbundet/Swedish Teachers' Union</i>	<i>ECE, PE, LSE, USE, TVET, HE, ESP</i>	<i>230000</i>
Switzerland	<i>Dachverband Lehrerinnen und Lehrer Schweiz (LCH)</i>	<i>ECE, PE, LSE, USE, TVET, HE, ESP</i>	<i>50000</i>
United Kingdom	<i>NASUWT- The Teachers' Union</i>	<i>ECE, PE, LSE, USE, TVET</i>	<i>293000</i>
United Kingdom	<i>The Educational Institute of Scotland (EIS)</i>	<i>ECE, PE, LSE, USE, TVET, HE, ESP</i>	<i>55000</i>

<b>Region Europe</b>			
<i>Country</i>	<i>Organisation Name</i>	<i>Education Sector</i>	<i>Membership Size</i>
United Kingdom	<i>University and College Union (UCU)</i>	<i>TVET, HE</i>	<i>105000</i>
France	<i>Syndicat national des enseignants de second degré (SNES-FSU)</i>	<i>LSE, USE, ESP</i>	<i>58600</i>
France	<i>Syndicat national unitaire des instituteurs, professeurs des écoles et PEGC (SNUipp-FSU)</i>	<i>ECE, PE</i>	<i>35000</i>
Luxembourg	<i>Syndicat National des Enseignants (SNE)</i>	<i>ECE, PE, LSE</i>	<i>3800</i>
Portugal	<i>Federacion Nacional dos Professores (FENPROF)</i>	<i>ECE, PE, LSE, USE, TVET, HE</i>	<i>49239</i>
Spain	<i>Confederación de Sindicatos de Trabajadoras y Trabajadores de la Enseñanza - Intersindical (STEs-Intersindical)</i>	<i>ECE, PE, LSE, USE, TVET, HE, ESP</i>	<i>9600</i>

<b>Region Latin America</b>			
<i>Country</i>	<i>Organisation Name</i>	<i>Education Sector</i>	<i>Membership Size</i>
Argentina	<i>Federacion Nacional de Docentes Universitarios (CONADU)</i>	<i>ECE, HE, LSE, USE, TVET, ESP, HE</i>	<i>382000</i>
Argentina	<i>Confederacion de Trabajadores de la Educacion de la Republica Argentina (CTERA)</i>	<i>HE</i>	<i>17000</i>
Brazil	<i>Confederacao Nacional dos Trabalhadores em Educacao (CNTE)</i>	<i>ECE, PE, LSE, USE, ESP</i>	<i>1091394</i>
Chile	<i>Colegio de Profesores de Chile (CPC)</i>	<i>ECE, PE, LSE, USE, TVET</i>	<i>57831</i>
Paraguay	<i>Organización de Trabajadores de la Educación del Paraguay - Autentica (OTEP-Auténtica)</i>	<i>ECE, PE, LSE, USE, TVET, HE, ESP</i>	<i>6000</i>
Peru	<i>Sindicato Unico de Trabajadores en Educacion del Peru (SUTEP)</i>	<i>ECE, PE, LSE, USE, TVET, HE</i>	<i>350000</i>
Uruguay	<i>Federación Uruguaya de Magisterio - Trabajadores de Educación Primaria (FUM-TEP)</i>	<i>PE</i>	<i>20000</i>

<b>Region North America and the Carribean</b>			
<i>Country</i>	<i>Organisation Name</i>	<i>Education Sector</i>	<i>Membership Size</i>
Canada	<i>Canadian Teachers' Federation (CTF-FCE)</i>	<i>PE, LSE, USE</i>	<i>238000</i>
Canada	<i>Centrale des Syndicats du Quebec (CSQ)</i>	<i>ECE, PE, LSE, USE, TVET, ESP, HE</i>	<i>95000</i>
USA	<i>American Federation of Teachers (AFT)</i>	<i>ECE, PE, LSE, USE, TVET, ESP, HE</i>	<i>1700000</i>
USA	<i>National Education Association (NEA)</i>	<i>ECE, PE, LSE, USE, HE, ESP</i>	<i>2972240</i>

## Appendix 2

### Per Student Expenditures on Public Primary and Secondary Education PPP Dollars by Region and Country, 2014

<i>Country or territory</i>	<i>Government expenditures on primary education per pupil in constant 2014 PPP US\$</i>	<i>Government expenditures on secondary education per student in constant 2014 PPP US\$</i>
<b><i>Caucasus and Central Asia</i></b>		
Armenia	947	1,221
Azerbaijan	...	...
Georgia	753 <sup>x</sup>	...
Kazakhstan	...	4,743
Kyrgyzstan	...	...
Tajikistan	...	...
Turkmenistan	...	...
Uzbekistan	...	...
<b><i>Eastern and South-eastern Asia</i></b>		
Brunei Darussalam	6,894	18,370
Cambodia	217 <sup>z</sup>	...
China	...	...
R Korea	...	...
Hong Kong, China	8,137	11,123
Indonesia	1,447	1,146
Japan	8,791	9,333
Lao PDR	553	761
Macao, China	...	27,312 <sup>y</sup>
Malaysia	4,309	4,911
Mongolia	...	...
Myanmar	...	...
Philippines	...	...
Republic of Korea	9,991	9,528
Singapore	...	...
Thailand	3627 <sup>y</sup>	2,800 <sup>y</sup>
Timor-Leste	553 <sup>z</sup>	526 <sup>z</sup>
Viet Nam	1,130 <sup>y</sup>	...

Country or territory	Government expenditures on primary education per pupil in constant 2014 PPP US\$	Government expenditures on secondary education per student in constant 2014 PPP US\$
<b>Europe and Northern America</b>		
Albania	...	651 <sup>y</sup>
Andorra	...	...
Austria	11,369 <sup>z</sup>	13,213 <sup>z</sup>
Belarus	...	...
Belgium	9,950 <sup>z</sup>	11,504 <sup>z</sup>
Bosnia and Herzegovina	...	...
Bulgaria	3,914 <sup>y</sup>	3,775 <sup>y</sup>
Canada	...	...
Croatia	...	...
Cyprus	9,854 <sup>z</sup>	11,925 <sup>z</sup>
Czechia	4,908 <sup>y</sup>	7,441 <sup>y</sup>
Denmark	11,909 <sup>y</sup>	13,126 <sup>y</sup>
Estonia	6,560 <sup>z</sup>	6,897 <sup>z</sup>
Finland	8,818 <sup>z</sup>	...
France	7,212 <sup>y</sup>	10,739 <sup>y</sup>
Germany	8,430 <sup>z</sup>	10,993 <sup>z</sup>
Greece	...	...
Hungary	3,741 <sup>z</sup>	5,848 <sup>z</sup>
Iceland	10,675 <sup>y</sup>	8,009 <sup>y</sup>
Ireland	7,970 <sup>y</sup>	12,158 <sup>x</sup>
Italy	7,698 <sup>z</sup>	8,303 <sup>z</sup>
Latvia	6,598 <sup>z</sup>	6,459 <sup>z</sup>
Liechtenstein	...	...
Lithuania	5,152 <sup>y</sup>	4,816 <sup>y</sup>
Luxembourg	19,720 <sup>z</sup>	20,393 <sup>z</sup>
Malta	9,013 <sup>y</sup>	12,184 <sup>y</sup>
Monaco	...	...
Montenegro	...	...
Netherlands	8,403 <sup>z</sup>	11,706 <sup>z</sup>
Norway	13,006 <sup>y</sup>	...
Poland	7,010 <sup>z</sup>	5,715 <sup>z</sup>
Portugal	6,813 <sup>z</sup>	8,452 <sup>z</sup>
Republic of Moldova	2,075	1,958
Romania	2,250 <sup>x</sup>	3,289 <sup>z</sup>
Russian Federation	...	...
San Marino	...	...

<i>Country or territory</i>	<i>Government expenditures on primary education per pupil in constant 2014 PPP US\$</i>	<i>Government expenditures on secondary education per student in constant 2014 PPP US\$</i>
Serbia	...	...
Slovakia	5,945 <sup>z</sup>	6,003 <sup>z</sup>
Slovenia	8,705 <sup>y</sup>	7,805 <sup>y</sup>
Spain	5,964 <sup>z</sup>	7,456 <sup>y</sup>
Sweden	10,407 <sup>z</sup>	11,499 <sup>z</sup>
Switzerland	15,636 <sup>z</sup>	15,620 <sup>z</sup>
TFYR Macedonia	...	...
Ukraine	2,348 <sup>z</sup>	2,250 <sup>z</sup>
United Kingdom	8,768 <sup>z</sup>	9,011 <sup>z</sup>
United States	10,509 <sup>z</sup>	11,877 <sup>z</sup>
<b><i>Latin America and the Caribbean</i></b>		
Anguilla	...	...
Antigua and Barbuda	...	...
Argentina	2,862 <sup>z</sup>	4,242 <sup>z</sup>
Aruba	...	...
Bahamas	...	...
Barbados	...	3,215 <sup>z</sup>
Belize	1,318 <sup>z</sup>	1,919 <sup>z</sup>
Bermuda	4,437 <sup>z</sup>	6,582 <sup>z</sup>
Bolivia, P.S.	1,585 <sup>z</sup>	1,228 <sup>z</sup>
Brazil	3,227 <sup>y</sup>	3,484 <sup>y</sup>
British Virgin Islands	...	...
Cayman Islands	...	...
Chile	3,566	3,906
Colombia	2,430	2,189
Costa Rica	4,135	3,889
Cuba	...	...
Curaçao	...	...
Dominica	1,433 <sup>x</sup>	...
Dominican Republic	2,175	2,079
Ecuador	1,007	566
El Salvador	1,015	981
Grenada	...	...
Guatemala	773	389
Guyana	524 <sup>x</sup>	627 <sup>x</sup>
Haiti	...	...

<i>Country or territory</i>	<i>Government expenditures on primary education per pupil in constant 2014 PPP US\$</i>	<i>Government expenditures on secondary education per student in constant 2014 PPP US\$</i>
Honduras	928 <sup>y</sup>	881 <sup>y</sup>
Jamaica	1,848	2,385
Mexico	2574 <sup>z</sup>	2829 <sup>z</sup>
Montserrat	...	...
Nicaragua	...	...
Panama	...	...
Paraguay	1,113 <sup>x</sup>	1,275 <sup>x</sup>
Peru	1,610	1,780
Saint Kitts and Nevis	1,502	3,579
Saint Lucia	1,913	3,121
Saint Martin	1,893	2,388
Saint Vincent/Grenadines	...	...
Sint Maarten	...	...
Surinam	...	...
Trinidad and Tobago	...	...
Turks and Caicos Islands	...	...
Uruguay	...	...
Venezuela, B. R.	...	...
<b><i>Northern Africa and Western Asia</i></b>		
Algeria	...	...
Bahrain	5,166	8,101
Egypt	...	...
Iraq	...	...
Israel	7,279 <sup>z</sup>	6,240 <sup>z</sup>
Jordan	...	...
Kuwait	11,240 <sup>z</sup>	13,530 <sup>z</sup>
Lebanon	...	894 <sup>y</sup>
Libya	...	...
Morocco	1,450 <sup>y</sup>	8,925 <sup>y</sup>
Oman	...	...
Palestine	...	...
Qatar	...	...
Saudi Arabia	...	...
Sudan	...	...
Syrian Arab Republic	...	...
Tunisia	...	...

<i>Country or territory</i>	<i>Government expenditures on primary education per pupil in constant 2014 PPP US\$</i>	<i>Government expenditures on secondary education per student in constant 2014 PPP US\$</i>
Turkey	2,588 <sup>y</sup>	2,866 <sup>y</sup>
United Arab Republics	...	...
Yemen	...	...
<b><i>The Pacific</i></b>		
Australia	8,514 <sup>z</sup>	7,724 <sup>z</sup>
Cook Islands	...	...
Fiji	1,055 <sup>y</sup>	...
Kiribati	...	...
Marshall Islands	...	...
Micronesia, F. S.	...	...
Nauru	...	...
New Zealand	6,717	8,078
Niue	...	...
Palau	...	...
Papua New Guinea	...	...
Samoa	...	...
Solomon Islands	...	...
Tokelau	...	...
Tonga	...	...
Tuvalu	...	...
Vanuatu	390	607
<b><i>Southern Asia</i></b>		
Afghanistan	183	185
Bangladesh	230	245
Bhutan	2,451	2,445
India	488 <sup>y</sup>	841 <sup>y</sup>
Iran, Islamic Republic of	1,360	2,586
Maldives	2,096 <sup>z</sup>	...
Nepal	305	258
Pakistan	364	721
Sri Lanka	848	678 <sup>y</sup>
<b><i>Sub-Saharan Africa</i></b>		
Angola	...	...
Benin	215	238

<i>Country or territory</i>	<i>Government expenditures on primary education per pupil in constant 2014 PPP US\$</i>	<i>Government expenditures on secondary education per student in constant 2014 PPP US\$</i>
Botswana	...	...
Burkina Faso	264	282
Burundi	98 <sup>y</sup>	237 <sup>y</sup>
Cabo Verde	926 <sup>y</sup>	1,057 <sup>y</sup>
Cameroon	170 <sup>x</sup>	553 <sup>x</sup>
Central African Republic	...	...
Chad	129 <sup>x</sup>	262 <sup>x</sup>
Comoros	261 <sup>z</sup>	227 <sup>z</sup>
Congo	...	...
Côte d'Ivoire	489	857
D. R. Congo	56 <sup>y</sup>	42 <sup>y</sup>
Djibouti	...	33
Equatorial Guinea	...	...
Eritrea	...	...
Ethiopia	102	310 <sup>x</sup>
Gabon	...	...
Gambia	175 <sup>y</sup>	...
Ghana	357 <sup>z</sup>	1,105 <sup>z</sup>
Guinea	109 <sup>z</sup>	148 <sup>z</sup>
Guinea-Bissau	...	...
Kenya	307	...
Lesotho	...	...
Liberia	...	...
Madagascar	95 <sup>x</sup>	121 <sup>x</sup>
Malawi	113	289
Mali	247 <sup>z</sup>	442 <sup>z</sup>
Mauritania	331 <sup>y</sup>	593 <sup>y</sup>
Mauritius	2,490	6,101
Mozambique	165 <sup>y</sup>	566 <sup>y</sup>
Namibia	...	...
Niger	279 <sup>z</sup>	689 <sup>z</sup>
Nigeria	...	...
Rwanda	94	531
Sao Tome and Principe	354 <sup>z</sup>	255 <sup>z</sup>
Senegal	465 <sup>z</sup>	...
Seychelles	...	...
Sierra Leone	108 <sup>y</sup>	152 <sup>y</sup>







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# The Global Status of Teachers and the Teaching Profession

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