

A STRATEGY FOR MANAGING TEACHER MIGRATION IN SOUTHERN AFRICA

by

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DECLARATION

I declare that *A Strategy for managing teacher migration in Southern Africa* is my own work and that all the sources that I have used or quoted have been indicated and acknowledged by means of complete references.

A rectangular box containing a handwritten signature in blue ink. The signature appears to be 'D Sinyolo' with a horizontal line underneath.

.....30/11/2012.....
SIGNATURE DATE

(Dennis Sinyolo)

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ABSTRACT

International teacher migration has emerged as one of the key policy challenges confronting many countries, particularly in Southern Africa, with Botswana, South Africa and Zambia experiencing variable degrees of the cross-border movement of teachers. The aim of this research was to develop a strategy for managing teacher migration in Southern Africa, and balancing the right of individual teachers to migrate internationally, while protecting the integrity of vulnerable education systems and their human resources. The research comprised a literature review and an empirical study based on a mixed-methods research design combining the quantitative and qualitative research approaches. The literature study examined international teacher migration, including its main concepts, theories, causes and effects, while the empirical study assessed the statistical scope of teacher migration in Southern Africa (Botswana, South Africa and Zambia), its causes, effects, and management. A self-administered questionnaire was used to gather quantitative data from education officials, school principals and migrant teachers, while personal in-depth interviews were used to elicit complementary qualitative data from some experts on migration, education officials, teacher union leaders, school principals and migrant teachers. The results of the study revealed that teacher migration statistics and data were generally patchy and incomplete in Southern Africa; that international teacher migration in the region was driven by three main causes related to economic, political and salary conditions; and that teacher migration had both positive and negative effects on the education systems of Southern African countries, migrant teachers and their families. The findings further revealed that improving the management of teacher migration in Southern Africa required a systematic and coordinated approach involving sending and receiving countries, with reference to a common policy and legal framework supported by comprehensive teacher migration data. In this regard, and based on the identification of key principles and guidelines for teacher migration management, a model is proposed for the viable management of teacher migration in the Southern African region.

KEY WORDS

Migration; International migration; International labour migration; International teacher migration; Emigration; Immigration; Migrant teachers; Globalisation and migration; International migration norms and instruments; Commonwealth Teacher Recruitment Protocol; Rights; Southern Africa

TABLE OF CONTENTS

DECLARATION	i
ACKNOWLEDGEMENTS	ii
ABSTRACT.....	iii
TABLE OF CONTENTS.....	v
LIST OF TABLES	xi
LIST OF FIGURES	xii
LIST OF TEXT BOXES.....	xiii
LIST OF APPENDICES.....	xiv

CHAPTER 1: ORIENTATION TO THE STUDY

1.1 INTRODUCTION	1
1.2 BACKGROUND TO THE STUDY	4
1.3 MOTIVATION FOR THE STUDY	10
1.4 PROBLEM STATEMENT	13
1.5 AIM OF THE STUDY.....	14
1.6 RESEARCH DESIGN AND METHODOLOGY	15
1.6.1 Research approach	15
1.6.2 Selection of sites and participants.....	16
1.6.3 Data collection	17
1.6.4 Data analysis	18
1.6.5 Validity and reliability	18
1.6.6 Ethical considerations	18
1.7 DELIMITATION OF THE STUDY	19
1.8 CONCEPT CLARIFICATION.....	19
1.8.1 International migration.....	19
1.8.2 International labour migration	20
1.8.3 International teacher migration and brain drain.....	20
1.8.4 Return migration	20
1.8.5 Sending, receiving and transit countries.	21
1.8.6 Education management.....	21
1.9 ORGANISATION OF THE THESIS	21
1.10 CONCLUSION.....	23

CHAPTER 2: INTERNATIONAL MIGRATION, GLOBALISATION AND TEACHER MIGRATION: A LITERATURE REVIEW

2.1 INTRODUCTION	24
2.2 MIGRATION CONCEPTS DEFINED AND DISCUSSED.....	25
2.2.1 The concept of migration	25
2.2.2 Migrants (long-term and short-term migrants)	25
2.2.3 Internal, international migration and international labour migration.....	25
2.2.4 Brain drain and brain waste	27
2.2.5 Return and circular migration	28
2.3 INTERNATIONAL LABOUR MIGRATION AND GLOBALISATION.....	30
2.3.1 What is globalisation?.....	31
2.3.2 The link between international migration and globalisation.....	31
2.4. INTERNATIONAL MIGRATION FLOWS.....	32
2.5 THEORIES OF MIGRATION	35
2.5.1 The individual model	36
2.5.2 The historical-structural approach	37
2.5.3 The push-pull model	38
2.5.4 Transnationalism and networks theory	39
2.5.5 The migration systems theory	40
2.6 INTERNATIONAL MIGRATION POLICY AND INSTRUMENTS	42
2.6.1 The UN Convention on Migrant Workers’ Rights	42
2.6.2 The Global Commission on International Migration.....	43
2.6.3 The Global Forum on Migration and Development	45
2.6.4 ILO Conventions on migrant workers	45
2.6.5 The ILO/UNESCO Recommendation concerning the Status of Teachers, 1966	47
2.6.6 The Commonwealth Teacher Recruitment Protocol.....	48
2.7 THE BENEFITS AND COSTS OF INTERNATIONAL LABOUR MIGRATION	49
2.7.1 Benefits and costs of international migration to the host country	49
2.7.2 Costs and benefits of international labour migration to sending countries.....	54
2.7.3 The costs and benefits of international labour migration to individual migrants and their families	56
2.8 TEACHER RETENTION STRATEGIES.....	58
2.9 CONCLUSION.....	61

CHAPTER 3: TEACHER MIGRATION IN SOUTHERN AFRICA: A LITERATURE REVIEW

3.1 INTRODUCTION	64
3.2 THE MIGRATION AND TEACHER MIGRATION CONTEXT IN AFRICA	64
3.2.1 The demographic context.....	65
3.2.2 Main reasons for outward migration from Africa.....	66
3.2.3 The African Union’s response to the migration phenomenon	66
3.3 THE MIGRATION CONTEXT AND TEACHER MIGRATION IN SOUTHERN AFRICA	68
3.3.1 The migration context in Southern Africa	68
3.3.2 Stock of migrants in Southern Africa	70
3.3.3 Migration patterns, causes and impact: evidence from SAMP and other surveys.....	70
3.3.4 Xenophobia and regional attitudes to migration and migrants	72
3.3.5 Migration, labour migration and teacher migration in Botswana	73
3.3.6 Migration, labour migration and teacher migration in South Africa	74
3.3.6.1 Outward skilled migration and its causes	74
3.3.6.2 The impact of teacher emigration from South Africa.....	75
3.3.6.3 Inward teacher migration.....	76
3.3.7 Migration, labour migration and teacher migration in Zambia.....	77
3.3.7.1 Labour migration policies in Zambia	78
3.4 CONCLUSION.....	79

CHAPTER 4: EMPIRICAL RESEARCH METHODOLOGY

4.1 INTRODUCTION	82
4.2 RESEARCH DESIGN AND METHODOLOGY	83
4.2.1 Rationale for a mixed-methods design	83
4.2.2 Comparing and contrasting quantitative and qualitative approaches	84
4.3 POPULATION AND SAMPLING PROCEDURES	88
4.3.1 Contemplating the research population and the research sample	88
4.3.2 Research sample.....	92
4.4 DATA COLLECTION TECHNIQUES AND INSTRUMENTS.....	93
4.4.1 Questionnaire	93
4.4.2 Interview	95
4.5 RELIABILITY AND VALIDITY	97

4.5.1 Reliability.....	97
4.5.2 Validity	98
4.6 DATA ANALYSIS.....	99
4.7 PRINCIPLES AND ETHICS WHICH GUIDED THE RESEARCH.....	101
4.8 CONCLUSION.....	102

CHAPTER 5: ANALYSIS AND INTERPRETATION OF QUANTITATIVE DATA

5.1 INTRODUCTION	103
5.2 RESPONSE RATE AND CHALLENGES ENCOUNTERED.....	104
5.3 THE QUESTIONNAIRE.....	106
5.4. STATISTICAL SCOPE OF TEACHER MIGRATION IN SOUTHERN AFRICA	107
5.4.1 Number of migrant teachers.....	108
5.4.2 Profile of the migrant teachers who participated in the study	112
5.5 CAUSES OF TEACHER MIGRATION.....	119
5.6 EFFECTS OF TEACHER MIGRATION	124
5.7 SUGGESTIONS ON HOW TO MANAGE TEACHER MIGRATION VIABLY.....	129
5.7.1 Suggestions provided by school principals.....	130
5.7.2 Suggestions provided by migrant teachers	131
5.8 CONCLUSION.....	132

CHAPTER 6: ANALYSIS AND INTERPRETATION OF QUALITATIVE DATA

6.1 INTRODUCTION	136
6.2 INTERVIEW GUIDE.....	136
6.3 CAUSES OF TEACHER MIGRATION.....	138
6.3.1 Causes of teacher migration from the perspective of migration experts	138
6.3.2 Causes of teacher migration from the perspective of education officials.....	140
6.3.3 Causes of teacher migration from the perspective of teacher union leaders.....	142
6.3.4 Causes of teacher migration from the perspective of school principals	143
6.3.5 Migrant teachers’ reasons for choosing to migrate.....	145
6.4 EFFECTS OF TEACHER MIGRATION	146
6.4.1 Effects of teacher migration from the perspective of migration experts	146
6.4.2 Teacher union leaders’ perspective on the effects of teacher migration.....	153
6.4.3 Education officials’ perspective on the effects of teacher migration.....	155

6.4.4 School principals' perception of the effects of teacher migration	156
6.4.5 Migrant teachers' perspective and experiences regarding the effects of teacher migration	158
6.5 MANAGING TEACHER MIGRATION IN SOUTHERN AFRICA.....	161
6.5.1 Migration experts' perspective on how to manage teacher migration	162
6.5.2 Education officials' perspective on how to manage teacher migration	165
6.5.3 Teacher union leaders' perspective on how to manage teacher migration	167
6.5.4 School principals' perspective on how to manage teacher migration.....	168
6.5.5 Migrant teacher perspective on how to manage teacher migration	169
6.6 CONCLUSION.....	173

CHAPTER 7: RESEARCH FINDINGS, RECOMMENDATIONS AND AREAS FOR FURTHER STUDY

7.1 INTRODUCTION	176
7.2 SUMMARY OF THE MAIN RESEARCH FINDINGS AND CONCLUSIONS	178
7.2.1 Results and conclusions from the literature review	178
7.2.2 Results and conclusions from the empirical study.....	181
7.2.2.1 The scarcity and incompleteness of teacher migration data.....	182
7.2.2.2 The profile of migrant teachers in Southern Africa.....	183
7.2.2.3 The subjects taught by migrant teachers.....	184
7.2.2.4 Push and pull factors of teacher migration	184
7.2.2.5 The positive contribution of migrant teachers to the education systems of receiving countries.....	185
7.2.2.6 The positive and negative impact of teacher migration on migrant teachers and their families	185
7.2.2.7 The teacher migration paradox	186
7.2.2.8 Migrant teachers' return and rehire possibilities	187
7.2.2.9 The bureaucratic nature of migrant teachers' recruitment and registration processes.....	187
7.2.2.10 Effective strategies for managing teacher migration.....	188
7.3 PARAMETERS AND FEATURES OF A STRATEGY FOR MANAGING TEACHER MIGRATION IN SOUTHERN AFRICA	188
7.3.1 Comprehensive teacher migration data.....	188
7.3.2 A clear national policy, legal framework and coordinated implementation.....	189
7.3.3 A clear regional teacher migration and mobility policy with enabling instruments for implementation	189

7.3.4 Organised teacher recruitment, bilateral and multilateral agreements.....	189
7.3.5 Guaranteeing the rights of migrant teachers and their families	190
7.3.6 Improving teacher retention and managing teacher supply and demand.....	190
7.3.7 Harmonisation of teacher qualifications and salaries	191
7.4 A PROPOSED MODEL FOR MANAGING TEACHER MIGRATION IN SOUTHERN AFRICA	191
7.5 RECOMMENDATIONS	194
7.6 SUGGESTED AREAS FOR FURTHER STUDY	197
7.7 CONCLUSION.....	199
REFERENCES	201
APPENDICES	216

LIST OF TABLES

Table 4.1 Sample size at 95% confidence level and margin of error.....	90
Table 5.1 Migrant teachers in Botswana according to gender and age – 2011.....	109
Table 5.2 Migrant teachers in Limpopo Province of South Africa according to gender - 2010 to 2012.....	110
Table 5.3 Major source countries for teacher migration – 2012.....	113
Table 5.4 Ages of teachers from different source countries – 2012.....	115
Table 5.5 Causes of teacher migration according to school principals – 2012.....	120
Table 5.6 Push factors determined by migrant teachers – 2012.....	121
Table 5.7 Pull factors for teacher migration determined by migrant teachers – 2012.....	123
Table 5.8 School principals’ views on the impact of teacher emigration on the quality of education at their schools - 2012.....	124
Table 5.9 School Principals’ views on the impact of teacher migration on receiving countries – 2012.....	125
Table 5.10 Benefits of teacher migration cited by migrant teacher respondents – 2012.....	126
Table 6.2 A summary of the key proposals for managing teacher migration in Southern Africa - 2012.....	172

LIST OF FIGURES

Figure 5.1 Three-year migration trends in Limpopo Province - 2010 to 2012.....	111
Figure 5.2 Schematic representation of migrant teachers' countries of origin – 2012.....	113
Figure 5.3 Gender composition of migrant teachers who participated in the study – 2012...	114
Figure 5.4 Ages of migrant teachers - 2012	115
Figure 5.5 Highest professional qualifications of migrant teachers – 2012.....	116
Figure 5.6 Migrant teachers' years of teaching experience before departure - 2012.....	117
Figure 5.7 Subjects taught by migrant teachers – 2012.....	119
Figure 5.8 Push factors for teacher migration determined by migrant teachers – 2012.....	122
Figure 5.9 Pull factors for teacher migration determined by migrant teachers – 2012.....	123
Figure 5.10 Proportion of migrant teachers who maintained regular professional contact with their former schools.....	128
Figure 5.11 Migrant teachers' perception of challenges with the migration process – 2012.	129
Figure 7.1: A model for the optimal management of teacher migration in Southern Africa.	192

LIST OF TEXT BOXES

Box 6.1 A migrant teacher's experience of the teacher registration process in South Africa – 2012.....	160
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LIST OF APPENDICES

Appendix A: Letter to education officials requesting permission to conduct research	216
Appendix B: Letter to school principals requesting permission to conduct research at the site.....	222
Appendix C: Informed consent for individual interviews.....	224
Appendix D: Ministry of Education questionnaire.....	225
Appendix E: School principals' questionnaire.....	230
Appendix F: Migrant teachers' questionnaire.....	234
Appendix G: Interview guide.....	239

CHAPTER 1

ORIENTATION TO THE STUDY

1.1 INTRODUCTION

Human migration or mobility is probably as old as the human race itself. Population movements in response to demographic growth, climatic changes, warfare, the development of production and trade, have always been part of human history (Castles & Miller, 2003:50). Globalisation seems to have given rise or an impetus to a new wave of migration across the globe. The International Labour Organisation (ILO, 1999:7) contends that globalisation has had a profound effect on international labour migration. This is supported by Castles and Miller (2003:1) who say that the most striking features of globalisation are the growth of cross-border flows of various kinds, including investment, trade, cultural products, ideas and people and the proliferation of transnational networks. Thus, growing interdependency of countries, facilitated by technological developments such as modern communication and transport links, means that cross-border transactions in goods, services and capital occur much more frequently than ever before.

The term ‘migration’, as it relates to humans, is defined differently by different authors, but all of them seem to converge on one essential element, that migration involves the movement of people from one place to another. Skeldon (2008:27) defines migration as population movements, while Harris (2007:33) simply refers to it as ‘the movement of people’. The Organisation for Economic Cooperation and Development (OECD, 2008b:2) refers to migration as ‘human mobility’, while the American Federation of Teachers (AFT, 2009:14) says migration, in its broadest sense, simply refers to the process of moving from one location to another. In view of the above, one would conclude that human migration simply refers to the movement of people from one place to another. As the International Organisation for Migration (IOM, 2008:173) explains, such human movements may be internal (occurring within a country) or external (taking place across national borders) and be motivated by employment or other factors. Cross-border employment-related migration is known as international labour migration (Perruchoud, 2004:38). The main focus of this study is international teacher migration, which is an important component of international labour migration. In this regard, international teacher migration, generally referred to as ‘teacher

migration' in this thesis, refers to the cross-border movement of teachers and includes both emigration (outward migration) and immigration (inward migration).

Although migration statistics are patchy and inconsistent (Legrain, 2007:53), the World Bank (2006:27), estimates that the number of migrants to developed countries increased by 3% per year from 1980 to 2000, as compared to 2.4% in the 1970s. According to the same report, the number of migrants stood at 175 million globally in the year 2005. By 2006, this number had grown to 190.6 million, representing an 8.9% increase (Ratha & Xu, 2008:1). According to the International Organisation for Migration (IOM, 2010:115), by 2010 the number of international migrants had risen to 214 million, representing an increase of 12.3% within a period of 4 years. The International Labour Organisation (ILO, 2008:1) reveals that migrants constitute about 3% of the world's population and that migrant workers account for 90% of international migrants. Women make up close to 50% of migrant workers. The above statistics indicate that labour migration constitutes a very significant proportion of population movements across borders and studying international labour migration may thus help shed more light on the international migration phenomenon as a whole and on teacher migration, in particular.

Apparently, sub-Saharan Africa is one of the sub-continent with the highest number of migrants. Castles and Miller (2003:138-139) assert that Africa is the continent with the most mobile population. The above authors go on to reveal that in 1990, there were 30 million voluntary international migrants in sub-Saharan Africa, which is about 3.5% of the total population (0.5% above the global average). They further indicate that sub-Saharan Africa generates significant outflows of intercontinental migrants, mainly to Western Europe, North America and the Arab Region. However, the vast bulk of international migration in sub-Saharan Africa remains within the continent, thus showing the importance of studying intra-regional migration or migration occurring within the sub-continent.

Southern Africa has not been immune from migration and its impact. Peberdy and Crush (2007:179) reveal that skilled migration or brain drain from the Southern African Development Community (SADC) region has accelerated since 1990, particularly from South Africa, Malawi and Zimbabwe. There is also sizable intra-regional brain drain or brain circulation in the SADC region, usually resulting in tensions between countries (Peberdy & Crush, 2007:180). Pendleton (2008:35) corroborates the view that migration has increased

throughout the SADC region, with South Africa being the major regional destination. He partly attributes this to the end of apartheid in South Africa, the prevalence of better working and living conditions in South Africa as opposed to the rest of the continent, the integration of South Africa into the region's linkages to the global economy and increased poverty and unemployment in many African countries in the region. The author reveals that cross-border migration from South Africa is primarily to developed countries such as the United Kingdom, Australia, Canada and the United States of America (Pendleton, 2008:37).

Labour migration or migration in general, is not without causes. Most of these are attributed to the push and pull factors supported by the neo-classical model of migration (Castles & Miller, 2003:22). The push factors are those conditions that cause, motivate or force people to emigrate and these are found in the sending countries, while pull factors are those conditions that attract people to the destination country (Perruchoud, 2004:10). Push factors in the sending countries may be low salaries, poor conditions of work, lack of opportunities, poverty and conflict, while examples of pull factors in the destination country may be higher salaries accompanied by better working and living conditions. For example, the International Organisation for Migration (IOM, 2006:123) attributes the emigration of Zimbabweans to political and economic reasons in the source country. Once migrants have established themselves in a foreign country, they tend to maintain links with their home country and to encourage relatives and friends to join them. This phenomenon is linked to the network factors, which are another significant driver of international migration (Castles & Miller, 2003:28).

International migration has both positive and negative effects, on both the sending and receiving countries. Legrain (2007:181) contends that the emigration of skilled persons, known as brain drain, can harm sending countries, particularly developing countries in a variety of ways. Educated, talented and enterprising individuals contribute to the economic development of their countries through their skills; they create jobs and prosperity for others. When they emigrate, they deprive their country, not only of their own skills and experience, but also of these positive by-products. If highly skilled workers such as accountants, doctors, teachers and scientists emigrate, governments may lose out financially as it is very costly to train and replace such highly skilled professionals.

On the other hand, the receiving countries gain from the skills and the experience of the migrants. These skilled migrants may contribute significantly to the development of the economies of the destination countries (Legrain, 2007:181; Stalker, 2008:63). It is out of realisation of the enormous benefits of skilled migration that the Organisation for Economic Cooperation and Development (OECD) has been urging its member states to develop policies that attract talent and highly skilled migrants (OECD, 2008a:10). The OECD argues that the international mobility of labour is necessary, given aging populations and falling interest in certain occupations in OECD countries such as healthcare and teaching, with related concerns about potential labour shortages (OECD, 2008a:18).

Developing countries can also benefit from exporting their brain power (Legrain, 2007:182). This may boost the wages of the highly skilled workers who remain, since there will be fewer of them. Moreover, migrants send remittances to their family members in the source country and this improves their relatives' economic and social well-being. The International Organisation for Migration (IOM, 2006:22-23) reveals that remittance flows are the second largest source of external funding for developing countries, second only to foreign direct investment. In addition, returning migrants may possess additional skills, expertise and experience that can benefit the economy of their country of origin.

1.2 BACKGROUND TO THE STUDY

Southern Africa falls within the Southern African Development Community (SADC) Region. SADC, formerly known as the Southern African Development Coordination Conference (SADCC), was established in 1980 in Lusaka, Zambia. One of SADCC's main original aims was to reduce economic dependency on the then Apartheid South Africa by promoting economic integration among the member states. The SADC Treaty, which was later signed in 1992, places binding obligations on member countries with the aim of promoting economic integration, and this remains the regional body's fundamental goal. The SADC member states are Angola, Botswana, the Democratic Republic of Congo, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, Tanzania, Zambia and Zimbabwe. The SADC Secretariat is based in Gaborone, Botswana (Frame, 2008:1418-1419).

Although the main focus of the Southern African Development Community (SADC) is economic integration among the member states, the organisation has several social and human development programmes, some of them dealing directly with education and training. For example, the organisation has an Intra-regional Skills Development Programme and a Technical Committee on Accreditation and Certification, which seeks to harmonise the education and training systems in the region. In addition, the institution has a protocol on Education and Training. In Article 3 (g) of the protocol, the member states commit themselves to work towards the relaxation and eventual elimination of immigration formalities to facilitate freer movement of students and staff within the region for the specific purpose of study, teaching, research and any other pursuits related to education and training (SADC, 2008:2). The provisions of the protocol, which was ratified by almost all the member states in 1997, imply that the SADC supports student and staff mobility in the education sector. This is in line with the migration-development nexus school of thought, which seeks to emphasise the benefits of international migration, as opposed to its losses or brain drain (Pecoud & Guchteneire, 2007:12).

Several studies on international migration in the Southern African Development Community (SADC) Region have been conducted by various individuals and organisations, notably by the Southern African Migration Project (SAMP), the International Organisation for Migration (IOM), the Commonwealth Secretariat, and academics and researchers (Pendleton, 2008:35). In this regard, the SAMP has conducted four major regional migration projects: the National Immigration Policy Survey (NIPS), focusing on the attitudes of local citizens towards migrants and refugees and proposing various migration policy options for dealing with immigration; the Potential Skills Base Survey (PSBS), highlighting the migration behaviour and intentions of skilled nationals and skilled foreigners; the Cross Border Migration and Remittances Survey (MARS), analysing the development potential of the SADC diaspora; and the Migration and Poverty Survey (MAPS), examining the relationship between poverty and migration. The SAMP surveys covered both internal and cross-border migration across the region. The countries covered were Botswana, Lesotho, Malawi, Mozambique, Namibia, South Africa, Swaziland and Zimbabwe and the main focus of the surveys was migration in general, and labour migration in particular. However, none of the surveys focused specifically on teacher migration (Pendleton, 2008:36). This is a significant gap that was addressed in this study, by having an in-depth assessment and analysis of the teacher migration phenomenon in the Southern Africa region. Nevertheless, the findings of the

SAMP surveys provide relevant and useful information on migration patterns in the region, its causes, impact, benefits and costs. This information informed the empirical study and the formulation of a strategy for the management of teacher migration in Southern Africa.

The main findings from the Southern African Migration Project (SAMP) surveys reveal that South Africa is the main regional destination, followed by Botswana. South Africa is both a receiving and a sending country, with most of its emigrants going to such developed countries as the United Kingdom, Australia, Canada and the United States of America. The main sending countries in the region are Zimbabwe, Mozambique and Lesotho. The decision to migrate is mainly influenced by multiple factors, the most important of which are economic and family networks, political stability concerns, health and living conditions and access to schooling. Although most of the migrants were male (65%), increased female migration is becoming a major characteristic of the present and future migration patterns (Crush, 2008:26; Pendleton, 2008:37-38).

The International Organisation for Migration (IOM) has undertaken studies in selected countries in the Southern Africa region. For example, a study on general migration and development was carried out in Angola and Zambia in 2004 (Ammassari, 2005:1-92) and in Zimbabwe in 2005 (Bloch, 2005:1-93). The overall aim of the former was to gain a better understanding of the general migration and development situation of these two countries, while that of the latter was to obtain a profile of Zimbabweans in the United Kingdom and South Africa in terms of their skills base, transnational links and interest in contributing to development in their home country. Although these studies provide useful information on migration issues in these countries, none of them focused specifically on migration in the education sector.

Some notable studies on teacher migration in Southern Africa were conducted by Nunn (2005:1-72), Appleton, Sives and Morgan (2006a:121-142), Sinyolo (2007:1-79) and by researchers commissioned by the Commonwealth Secretariat (De Villiers & Degazon-Johnson, 2007:7-12; Ochs, 2007:1-49; Reid, 2006:1-32). Nunn (2005:1) reviewed available literature on brain drain, with a specific emphasis on its impact on developing countries in Africa and on academic labour in the United Kingdom (UK). Nunn (2005:7) argues that the loss of teachers undermines the ability of schools and education systems to function, and that brain drain is a serious barrier to economic growth, development and poverty reduction. The

author reveals that the push factors driving academic brain drain include a lack of life chances, low living standards, political and social instability, a lack of opportunities to utilise skills and natural disasters. The pull factors include higher wages, job opportunities, good working conditions, freedom from political instability and the use of immigration policies meant to attract skilled migrants. Nunn (2005:65) recommends the development of protocols to regulate international recruitment practices. Apart from the fact that this study relied solely on secondary data in that it analysed existing studies on skilled migration, it mainly focused on the migration of academics in higher education to the United Kingdom. This is another gap this research addressed by collecting both primary and secondary data and by focusing on teachers involved in migration activities at secondary school level.

In their study on teacher migration, Appleton, Sives and Morgan (2006a:121) assessed the impact of international teacher migration on Southern Africa with a specific focus on South Africa and Botswana. This was a micro level study concentrating on individual schools in the two countries. The authors reveal that South Africa has been a net sender of educators, mainly to the United Kingdom and that the country has been at the forefront of protests about international teacher mobility. All the 16 schools participating in the study had been affected by international teacher migration and each school had lost three teachers on average between 2000 and 2004. Most of the educators who had left, such as mathematics and commerce teachers, were usually hard to replace and this negatively affected the quality of education in the affected schools.

On the other hand, Botswana has been a net receiver of teachers. The administrative data from Botswana provided in 2006 recorded that 4.5 % of the teachers were expatriates. In government secondary schools, the proportion of expatriate teachers rose to 15%. The private school sector was almost exclusively run by expatriate teachers and the majority of foreign teachers in Botswana were from Ghana, Kenya Swaziland, Zambia and Zimbabwe (Appleton, Sives & Morgan, 2006b:774).

Sinyolo (2007: 53-55) carried out a study on teacher supply, recruitment and retention in which he assessed teacher migration in the framework of teacher attrition (total teacher loss) at primary and secondary school levels. The study covered six Anglophone sub-Saharan African countries, namely, The Gambia, Kenya, Lesotho, Tanzania, Uganda and Zambia. According to the author, the average rate of teacher attrition attributable to brain drain at

primary school level in the six countries is 0.5%. For example, in 2004 Uganda lost 2 110 primary school teachers to migration, while Kenya lost 210 teachers, Zambia 200 teachers and Lesotho 10 teachers. Most Ugandan and Kenyan teachers were going to South Sudan and Rwanda, while Zambian teachers, particularly at secondary school level, were leaving the country for greener pastures in Botswana, South Africa, Swaziland, Namibia and Angola. Most of the secondary school teachers who had left the country were experienced mathematics and science teachers, thus creating a shortage of these teachers in the local schools. The main causes of teacher emigration in the participating countries were cited as low salaries, poor conditions of service, a serious back-log in the payment of allowances and lack of accommodation.

The Commonwealth Secretariat has conducted and commissioned several studies on teacher migration, particularly from developing to developed countries. Most of these studies revolve around the development and implementation of the Commonwealth Teacher Recruitment Protocol (CTRP), a non-binding instrument adopted by the Commonwealth Conference of Education Ministers, at Stoke Rochford Hall, Lincolnshire, United Kingdom, in 2004 (De Villiers & Degazon-Johnson, 2007:7). The CTRP aims to balance the rights of teachers to migrate internationally, on a temporary or permanent basis, against the need to protect the integrity of national education systems, and to prevent the exploitation of the scarce human resources of poor countries. The CTRP also seeks to safeguard the rights of recruited teachers and the conditions related to their service in the recruiting country. Although the CTRP is not binding, it holds moral authority on the matters it addresses. Therefore, Commonwealth member states have a moral obligation to uphold its principles (De Villiers & Degazon-Johnson, 2007:9).

Examples of the studies conducted and commissioned by the Commonwealth Secretariat include a study on teacher mobility and loss conducted in 2003. This study revealed that developed countries such as the United Kingdom, the United States of America, Australia and New Zealand were 'poaching' teachers from developing countries, mainly from the Caribbean, Asia and Africa. The term 'poaching' is used to illustrate that the recruitment of teachers took place without the consent of the source countries involved. The loss of qualified and experienced teachers was seriously affecting the capacity of these developing countries to deliver quality education. This study on capacity loss on account of teacher mobility informed and influenced the adoption of the Commonwealth Teacher Recruitment

Protocol (CTRP) in 2004. The adoption of the CTRP was an attempt to try to manage or control the recruitment of teachers, particularly from developing to developed countries (De Villiers & Degazon-Johnson, 2007:10; Miller, Mulvaney & Ochs, 2007:154).

In 2005, Reid (2006:1) conducted a study on the experiences of teachers working in the United Kingdom recruited in the Commonwealth. This study, which included respondents from countries in Southern Africa, sheds light on the causes of teacher migration and on the difficulties experienced by these teachers in the United Kingdom. In 2007, the Commonwealth Secretariat organised a teacher research symposium, in collaboration with the National Union of Teachers (Ochs, 2007:1). The symposium discussed various research findings on the international mobility and migration of teachers, including progress on the implementation of the Commonwealth Teacher Recruitment Protocol (CTRP).

What emerges from the above discussion is that some notable studies have been conducted on international migration in Southern Africa. However, most of these studies have focused on migration in general, with little or no reference to the education sector and the dilemma of respecting the right of individual teachers to migrate, while protecting the integrity of national education systems and their scarce human resources (teachers). Even where specific studies have been conducted on international migration in the education sector in this region, none of them seem to have analysed the various dimensions of teacher migration in detail in order to make it possible for policy makers to fully understand the phenomenon and how to manage it.

Using the Commonwealth Teacher Recruitment Protocol (CTRP) as a frame of reference, this thesis examined how the principle of balancing the rights of individual teachers to migrate internationally, against the need to protect the integrity of national education systems and prevent the exploitation of the human resources of poor countries may be applied to Southern Africa. The thesis assessed and analysed various aspects and dimensions of teacher migration, including its scope, causes and impact. This study also discussed possible ways of dealing with the dilemma of balancing the rights of individual teachers to migrate, while at the same time protecting poor countries from losing their qualified teaching personnel and the detrimental effect this might have on their education systems. This study thus contributes to the existing pool of knowledge in this field by providing an in-depth analysis and insights into the teacher migration phenomenon in Southern Africa and by coming up with basic

principles for managing teacher migration. The thesis proffers a strategy and a model for the management of teacher migration in Southern Africa. Such a strategy and model may be used by policy-makers and planners at Southern African Development Community (SADC) level, country level and other levels such as schools.

1.3 MOTIVATION FOR THE STUDY

The education sector is a labour-intensive social service whose success depends on the availability of teachers and other human resources. The availability (or non-availability) of teachers does not only affect access to education, it also affects the quality of education provided (Sinyolo, 2007:16; Watkins, 2008:117).

In 1990, representatives of the majority of the world's nations committed themselves at the World Conference on Education for All (EFA) in Jomtien, Thailand, to achieve universal primary education (UPE) and reduce illiteracy by the year 2000. As the new millennium approached, it was clear that many developing countries were still very far from reaching these targets; in 2000 in Dakar, Senegal, representatives from the international community met again at the World Education Forum (WEF) and committed themselves to achieving EFA by 2015. The Dakar Framework for Action, adopted at the WEF, pledges to expand learning opportunities for every child, youth and adult through six key educational goals (UNESCO, 2000; Watkins, 2008:1).

The six EFA goals are summarised by Education International (EI, 2008:2) as follows:

- Expand early childhood care and education;
- Provide free and compulsory primary education for all;
- Promote learning and life skills for young people and adults;
- Increase adult literacy by 50% ;
- Achieve gender parity by 2005 and gender equality by 2015;
- Improve the quality of education.

In September 2000, world leaders came together at the United Nations (UN) Headquarters in New York to adopt the United Nations Millennium Declaration, committing their nations to a

new global partnership to reduce extreme poverty and to set out a series of time-bound targets - the Millennium Development Goals - with a deadline of 2015 (UN, 2000:1-9).

The six Education for All (EFA) goals correlate with the following two Millennium Development Goals (MDGs), (Sinyolo, 2007:18):

Goal 2: Achieve universal primary education. Target: Ensure that by 2015 children everywhere, boys and girls will be able to complete a full course of good quality primary schooling.

Goal 3: Promote gender equality and empower women. Target: Eliminate gender disparity in primary and secondary education, preferably by 2005, and at all levels of education no later than 2015.

Inevitably, the Millennium Development Goals (MDGs) cannot be achieved without adequate numbers of trained teachers (Sinyolo, 2007:16), yet current estimates show that many parts of the world, including Southern Africa, have a serious shortage of qualified teachers. For example, the United Nations Educational Scientific and Cultural Organisation (UNESCO) Institute for Statistics (UIS) estimated that in 2006 the world needed over 18 million additional primary school teachers to achieve universal primary education by 2015. Sub-Saharan Africa alone needed close to four million primary school teachers to achieve the same goal (UIS, 2006:100). Recent data from the Education for All Global Monitoring Report (GMR, 2012:7-8) reveals that over two million new teachers, 55% of them in sub-Saharan Africa, are still needed to achieve the goal of universal primary Education by 2015.

International teacher migration or brain drain tends to aggravate teacher shortages in a number of sending countries. For example, Zimbabwe has been losing large numbers of teachers to neighbouring countries, particularly South Africa, and this was partly responsible for the collapse of the country's education system in the last decade (ZIMTA, 2007:1). According to anecdotal evidence, mainly from sources quoted in the press, the country experienced an exodus of teachers, particularly since the beginning of 2007. For example, according to Ncube (2007:2), more than 500 public school teachers in Zimbabwe's second largest city of Bulawayo deserted their jobs over poor pay, leaving students unattended. Kandemiri (2007:1) reported that the country had a shortage of over 10 000 teachers country-

wide. Some of the teachers who emigrated were special subject teachers, such as mathematics and science teachers. Some of these teachers migrated to South Africa to fill vacancies left by South African teachers who had migrated, mainly to the United Kingdom.

Nunn (2005:56) reveals that in 2004, South Africa had the highest number of academic migrants from Africa in the United Kingdom. The demand for teachers in the West is likely to increase owing to the region's aging population (OECD, 2008a:18). These developed countries are likely to turn to developing countries, such as those in Southern Africa to meet their own shortfalls. This partly explains why the OECD encourages its member states to promote mobility of the highly skilled (OECD, 2008a:22). Such competition for talent is likely to further undermine the integrity of Southern Africa's education systems and to retard progress and development. These vulnerable countries may continue to spend enormous financial and other resources training their professionals only to lose them to developed countries, yet these advanced economies have the financial and other means to train their own manpower.

As noted in Section 1.1, international migration can have enormous, individual, social and economic benefits for the sending country as well. For example, economic benefits in the form of remittances sent back home and additional knowledge and skills acquired by returning migrants can be of great benefit to the country (Villalba, 2008:52-53). Furthermore, allowing the free movement of teachers and other professionals or brain circulation, particularly within the Southern African Development Community (SADC) region, would constitute brain gain and a win-win situation for both the sending and receiving countries (Degazon-Johnson, 2007:3). In that respect, teacher mobility within the region would encourage a cross-pollination of ideas and the acquisition and utilisation of new skills, for the benefit of both the sending and receiving countries in the region.

In view of the foregoing, teacher migration has both negative and positive impacts, for both the sending and the receiving country. The need to explore ways to minimise the negative effects of teacher migration in Southern Africa and to maximise its benefits in the region motivated the researcher to embark on this particular study. It is also the desire to see the Southern African Development Community (SADC) region keep and manage its teachers more effectively to achieve the Education for All (EFA) targets and the Millennium Development Goals (MDGs) that influenced the researcher to embark on this particular

study. In addition, the researcher's personal experience as a migrant worker from Southern Africa, particularly, the migration related joys and challenges he has experienced in his work situation (which partly involves dealing with migration issues in the education sector) further motivated the researcher to investigate this issue.

As has emerged from the foregoing analysis, several gaps exist in the area of teacher migration in Southern Africa. These relate to the lack of specific and in-depth studies on teacher migration in Southern Africa and the challenge of dealing with the dilemma of respecting the right of individual teachers to migrate, while protecting the integrity of national education systems and their scarce human resources (teachers). As was noted in Section 1.2, even where specific studies have been conducted on international teacher migration in Southern Africa, none of them seem to have analysed the various dimensions of teacher migration in detail in order to make it possible for policy makers to fully understand the phenomenon and how to manage it.

This study addressed these gaps, particularly the general absence of specific studies on minimising the negative effects and optimising the mutual benefits of teacher migration to both sending and receiving countries in Southern Africa.

1.4 PROBLEM STATEMENT

The current levels of teacher migration in some countries in Southern Africa have reached significant levels, thereby threatening to derail the achievement of the Education for All (EFA) targets and Millennium Development Goals (MDGs), the general provision of education and the attainment of quality education. There is a need to find ways to minimise the negative effects of international teacher migration in the region and to maximise the benefits of this global phenomenon. This calls for the development of effective policies and strategies for managing teacher migration in the region. Therefore, the problem statement of this thesis, articulated into a research problem, is:

- How can the migration of teachers be managed in Southern Africa in order to balance the rights of teachers to migrate internationally against the need to protect the integrity of national education systems and to prevent the exploitation of poor countries' human resources?

A number of research sub-questions arise from the problem statement. Answers to these sub-problems contributed to solving the main research question and enabled the researcher to address the main problem under investigation. These sub-questions are:

- What is the statistical scope of teacher migration in Southern Africa in terms of countries, gender, age group, skill level and subjects most affected?
- What are the main causes of teacher migration?
- What are the main effects of teacher migration?
- What are the main principles and guidelines that can be formulated to manage teacher migration?
- What are the parameters and essential features of a strategy for managing teacher migration viably?

1.5 AIM OF THE STUDY

The aim of this research was to devise a strategy for analysing, understanding and managing teacher migration in Southern Africa. The study pays particular attention to the push-and-pull factors in teacher migration, teacher migration trends and effects (both negative and positive) on education systems in the region. Policy recommendations based on the study's findings are conveyed to policy makers in the region, governments, educational planners and other stakeholders.

Explicitly stated, the aims of this research were to:

- Assess the statistical scope of teacher migration in Southern Africa in terms of countries, gender, age group, skill level and subjects most affected;
- Carry out an analysis of the main causes of teacher migration;

- Investigate the main effects of teacher migration;
- Formulate the main principles and guidelines for managing teacher migration; and,
- Develop a model for managing teacher migration viably.

1.6 RESEARCH DESIGN AND METHODOLOGY

This study consisted of a literature analysis and an empirical investigation of teacher migration in Southern Africa. The literature study focused on both primary and secondary sources of information. Since the literature study reveals what is already known about the area of study and the main concepts and theories relevant to the area (Bryman, 2008:81), it enabled the researcher to deepen his understanding of teacher migration, its main concepts, theories, causes and effects. This, and the subsequent empirical study enabled the researcher to understand education management implications of teacher migration in Southern Africa and to develop a model for analysing, understanding and managing the phenomenon in a viable way.

1.6.1 Research approach

This study employed a mixed-methods research design by combining the quantitative and qualitative approaches. Since combined methods present different ways of seeing the world, and since those viewpoints complement each other (Chilisa & Preece, 2005:184), their use in this study enhanced the validity and the integrity of the findings (Bryman, 2008:609). As Creswell (2003:16) reveals, the advantage of combining quantitative and qualitative methods is that the biases inherent in one method are overcome by the use of the other method.

The mixed-methods approach was applied by combining the descriptive survey design (part of the quantitative paradigm) with qualitative interviewing and by using quantitative and qualitative data analysis. Such a combination of methods is used in many studies, on a regular basis; among others it was used successfully by Wacman & Martin in 2002 in a study of the attitudes of male and female managers in Australia (Bryman, 2008:623).

According to Chivore (2003:14), 98% of all educational research employs survey methods. This implies that the descriptive survey design is one of the most effective methods used in studying educational issues. Best (in Cohen, Manion & Morrison, 2000:169) says the descriptive survey design is concerned with conditions or relationships that exist, opinions that are held, processes that are going on and trends that are developing in social units. Data gathering techniques used in surveys include structured or semi-structured interviews, self-administered or structured questionnaires, standardised tests and attitude scales (Cohen, Manion & Morrison, 2000:169). The descriptive survey method is broad in scope and flexible and it can be a relatively cheap and a quick way of obtaining reliable and representative data (Chivore, 2003:14). Qualitative interviewing enables the researcher to conduct in-depth interviews which may reveal much more information than the standard questionnaire which is normally used in survey research (Bryman, 2008:623).

In view of the above, the mixed-methods approach, combining the descriptive survey design with qualitative interviewing helped the researcher to discover, describe, analyse and interpret those conditions that relate to teacher migration in Southern Africa, including its magnitude, nature, causes and effects. Furthermore, the combined methods approach enabled the researcher to use the mainly quantitatively constructed questionnaire and the in-depth individual interview to gather complementary data and to analyse the data both quantitatively and qualitatively.

1.6.2 Selection of sites and participants

In this study, the target population comprised secondary school migrant teachers, school principals in secondary schools with migrant teachers, Ministry/Department of Education officials and leaders of teachers' unions in three Southern African countries, namely, Botswana, South Africa and Zambia. These countries were purposefully selected because literature reveals that they are all affected by teacher migration in different ways, with Botswana and South Africa being both sending and receiving countries, while Zambia is predominantly a sending country (Castles & Miller, 2003:142-143; IOM, 2006:299-307). A combined sample of respondents and participants, comprising the following categories and sizes was drawn from the three countries: three Education Officers (one from each Ministry/Department of Education), 30 school principals (10 from each country), 30 migrant teachers (10 from each country), three leaders of teachers' unions (one from each country),

11 migration experts, comprising four representatives of regional/international organisations, namely, the Commonwealth Secretariat, the International Organisation for Migration [IOM], the Southern African Migration Project [SAMP] and the Southern African Development Community [SADC] and seven academics purposefully selected on the basis of their published works on migration and/or teacher migration in the region. A total of 77 respondents and participants were approached for data collection. Of these, 63 respondents, comprising three Education Officers, 30 school principals and 30 migrant teachers were approached to respond to the self-administered survey questionnaire. The 11 migration experts, the three Education Officers, the three representatives of teacher unions, 10 school principals and 10 migrant teachers were approached to participate in the in-depth individual interviews. The number of interviewees, 37 in total, was considered ample to dedicate sufficient time to each interview and delve deeper into the migration issues under investigation.

Purposeful sampling, based on secondary schools that had experienced immigration and emigration, was used to identify the most appropriate sites (participating secondary schools) from which the respondents and participants were drawn. However, the migrant teachers participating in this research were mainly identified using the snowballing sampling technique and their personal experiences enabled the researcher to have an in-depth understanding of the teacher migration phenomenon in Southern Africa and how it can be managed.

1.6.3 Data collection

The questionnaire and interview were the main data gathering instruments. Self-administered questionnaires were selected for this study because they are relatively easy to use and inexpensive, while interviews were chosen because they can yield in-depth information from the interviewee's perspective (Cooper, Donohue & Tharenou, 2007:102). The questionnaire had both structured and semi-structured items, while the individual in-depth interview was of a semi-structured nature. The use of these complementary data gathering instruments enabled the researcher to validate the information obtained and helped him to gain a deeper insight into the issues under investigation. The researcher engaged research assistants who helped dispatch questionnaires to, and collect completed questionnaires from the respondents.

1.6.4 Data analysis

The results of the study were presented and analysed both quantitatively and qualitatively. The results were presented quantitatively in terms of statistics expressed as percentages and frequency tables, and qualitatively in terms of main categories and themes. Descriptive statistics were used to analyse the data quantitatively, while the phenomenological method was used to analyse the data qualitatively through the rigorous examination of interview data and the identification of common themes. The use of descriptive statistics enabled the researcher to present the data using tables, frequency distributions, diagrams and other graphic devices that can be easily understood by policy makers, education managers, including school principals, and by other stakeholders in Southern Africa and beyond, while the use of the phenomenological approach enabled the researcher to code data and form themes, resulting in an in-depth description of the teacher migration phenomenon (Watling, 2006:272; Creswell 2007:270; Bryman, 2008: 324).

1.6.5 Validity and reliability

Lankshear and Knobel (2004:161) advise researchers to pay particular attention to validity and reliability. Validity is the extent to which an indicator or a set of indicators measures what it is devised to gauge, while reliability is the consistency of a measure of a concept (Bryman, 2008:149;151). In this study, the researcher ensured validity and reliability through careful sampling, meticulous development of both the questionnaire and interview guide, piloting the questionnaire among migrant teachers and school principals in South Africa and using the results to refine the instrument, and by employing triangulation, the latter pertaining to the incorporation of different data collection instruments and gathering data from different sources that included Education Officers, school principals, migrant teachers, teacher union leaders, and migration experts.

1.6.6 Ethical considerations

Busher (2006:74) stresses the need to respect the dignity and privacy of the participants in research. Leary (in Oluwatoyin, 2006:123) maintains that every researcher has an obligation to participants' welfare and that one way of doing this is to obtain informed consent. In this study, permission to conduct the research was obtained from each country's Permanent

Secretary for Education/Director of the Department of Education to collect data from the Education Officers and schools. Permission was also sought from the participating principals and migrant teachers. The anonymity of individual institutions and respondents was protected and the confidentiality of their identities ensured. To achieve the above, the completed questionnaires and recorded interviews were coded so that they did not refer to individuals and their institutions by name.

1.7 DELIMITATION OF THE STUDY

It is important to recognise that a number of boundaries or delimitations exist within the scope of this study. This study focused on the cross-border migration of secondary school teachers in Botswana, South Africa and Zambia. The study focused on both the emigration and immigration of teachers in these countries, paying particular attention to the latter. The study did not examine internal teacher migration occurring within individual countries because its main aim was to assess and analyse international teacher migration within the region and devise a strategy for managing teacher migration across country borders.

1.8 CONCEPT CLARIFICATION

This section defines the main terms used in this thesis. The clarification of the main concepts conveys the sense in which they are used in this study.

1.8.1 International migration

Castles and Miller (2003:1) view international migration as international population movements. These are cross-border flows of people, or movements from one country to another. The Organisation for Economic Cooperation and Development (OECD, 2008a:18) defines international migration as international mobility. This view is also held by Stalker (2008:10) who defines international migration as international flows of people and goes on to classify migrants as settlers, temporary workers, professionals, unauthorised workers (illegal immigrants), refugees and asylum-seekers. In view of the foregoing, international migration is the movement of people from one country to another regardless of their socio-economic or professional status. Such movement may be attributed to push factors in the sending countries (countries of origin), or pull factors in the receiving or destination countries (Castles & Miller, 2003:22). Some of the push factors may be war, poverty and natural disasters, while

some of the pull factors may be peace, better employment opportunities, higher salaries and a higher standard of living.

1.8.2 International labour migration

In this context, international labour migration refers to the cross-border movement of workers. These are what Stalker (2008:10) classifies as temporary workers, unauthorised workers and professionals. The Organisation for Economic Cooperation and Development (OECD, 2008a:18) views labour migration as 'the international mobility of labour'. This refers to the cross-border movement of all categories of labour, be they unskilled, semi-skilled or skilled.

1.8.3 International teacher migration and brain drain

Since teachers are basically skilled individuals, teacher migration falls into the category of skilled labour migration, defined by the International Organisation for Migration (IOM, 2006:13) as the emigration of individuals with considerable skill or educational attainment. The Organisation for Economic Cooperation and Development (OECD, 2008a:10) refers to skilled labour migration as 'mobility of the highly skilled' or 'mobility of talent'. Therefore, in this study, international teacher migration, generally referred to as 'teacher migration', is viewed as the movement of teachers (as skilled individuals) from one country to another and includes both outward and inward teacher migration.

Sometimes the emigration of teachers is viewed as a drain or loss, particularly by poor sending countries. It is this loss of skilled or educated personnel and its adverse consequences on the source country that is referred to as 'brain drain' (IOM, 2008:62).

1.8.4 Return migration

Return migration occurs when international migrants return to their country of citizenship (OECD, 2008b:164). Legrain (2007:194) defines return migration as 'brain gain' or 'brain circulation'. This is because returning migrants may possess enhanced skills and technological expertise which can contribute to their countries' development.

1.8.5 Sending, receiving and transit countries

The sending country is the migrant's country of origin, while the receiving country is the migrant's country of destination. The transit country is the third country or the country through which the migrant passes from the sending country to the receiving country (OECD, 2008a:10-11). For example, migrant workers from Malawi (sending country) may pass through Mozambique (transit country) on their way to South Africa (receiving or destination country). Similarly, Zambian teachers intending to teach in Botswana may transit through Zimbabwe.

1.8.6 Education management

Management refers to getting things done, effectively and efficiently, through and with other people (Robbins & DeCenzo, 2008:6). This definition seems to be in line with that of Mpokosa and Ndarutse (2008:11) who say education management comprises planning, organising, resourcing, leading, coordinating, directing and controlling an organisation with the objective of accomplishing a goal. Robbins and DeCenzo (2008:7) refer to planning, organising, leading and controlling as management processes. In light of the above, this thesis sought to explore what education authorities can do to manage (plan, organise, lead and control) teacher migration in Southern Africa in order to balance the rights of individual teachers to migrate internationally, against the need to protect the integrity of national education systems and to prevent the exploitation of poor countries' human resources.

1.9 ORGANISATION OF THE THESIS

Chapter 1 introduces the migration phenomenon, discusses the background to the study and its significance and relevance. The problem is stated and broken down into research questions or sub-problems, which guided the researcher during the inquiry. The research aim, research design and methodology are presented and unique terms clarified and given their contextual meaning. The chapter also highlights the programme of study which guided the researcher throughout the period of enquiry.

Chapter 2 represents a literature review specifically focused on reviewing literature on migration, globalisation and the world of work, labour migration, teacher migration and brain-drain, from a general or global perspective. Various migration models and international

instruments governing migration are identified and discussed. Chapter 2 also discusses the benefits and disadvantages of labour migration, and teacher migration, in particular. Finally, the chapter reviews literature on teacher retention strategies and the role of education management in ensuring teacher retention. Such teacher retention strategies shed some light on how to manage teacher migration.

Chapter 3 represents a contextual focus on literature related to migration, labour migration, teacher migration, brain drain and teacher retention in Southern Africa. In this chapter, the researcher specifically assesses and analyses the magnitude of teacher migration in Southern Africa, and its nature, causes and effects in line with the research aims. The review of the related literature helped the researcher to gain an in-depth understanding of the problem, its context and major components and to identify major principles that could guide the development of a strategy for managing teacher migration in Southern Africa.

Chapter 4 focuses on the empirical study and its methodology. The research design, population and sampling procedures, as well as data collection and analysis procedures, are discussed in detail. Validity, reliability and ethical considerations are also discussed in more detail.

Chapter 5 addresses the quantitative research findings of the empirical investigation. In this chapter, the researcher presents and discusses the findings from the quantitative investigation, guided by the research questions.

Chapter 6 focuses on qualitative data analysis, interpretation and presentation. The chapter analyses and presents data from the individual in-depth interviews, guided by the research questions.

Finally, Chapter 7 summarises the research findings, addresses the conclusions drawn from the findings and provides recommendations for consideration by policy makers, education planners, school principals and other interested stakeholders. The chapter proffers the main features of a strategy and a model for managing teacher migration in Southern Africa. Finally, recommendations for further study are given.

1.10 CONCLUSION

This chapter has discussed the background to the study. The problem statement and sub-problems have been highlighted and the research design and methodology discussed. The main concepts have also been clarified and the programme of study highlighted. What has emerged from this chapter is that teacher migration is a real phenomenon in Southern Africa and if left unchecked, it may threaten the capacity of some countries in the region to deliver quality education to its young people and derail the achievement of the Education for All (EFA) targets and the Millennium Development Goals (MDGs). Therefore, there is an urgent and compelling need to understand teacher migration in Southern Africa, its causes, nature and effects and to develop effective policies for managing the phenomenon. This study contributes to a more in-depth understanding of the migration phenomenon in the education sector and to the development of a model for the viable management of teacher migration in Southern Africa.

The following chapter explores the literature from a general or global perspective with particular focus on migration, globalisation and the world of work, labour migration, teacher migration and brain-drain. The benefits and disadvantages of labour migration, and teacher migration, in particular are discussed as well as the literature on teacher retention strategies and the role of education management in ensuring teacher retention. It is envisaged that exploring such teacher retention strategies will shed some light on how to manage teacher migration in Southern Africa.

CHAPTER 2

INTERNATIONAL MIGRATION, GLOBALISATION AND TEACHER MIGRATION: A LITERATURE REVIEW

2.1 INTRODUCTION

Chapter 1 discussed the background to the study. The problem statement and sub-problems were highlighted and the research design and methodology discussed. Key terms and concepts, as well as the programme of the study were also highlighted. What emerged from Chapter 1 is that teacher migration is a real phenomenon in Southern Africa (and globally) and if left unchecked, it may threaten the capacity of some countries in the region to deliver quality education to their children and young people and to derail the achievement of Education for All (EFA) targets and Millennium Development Goals (MDGs).

This chapter will review and analyse literature related to the concept of migration, international labour migration and globalisation and issues around the cross-border movement of teachers. The chapter will specifically focus on the review of literature on migration, globalisation and the world of work, labour migration, teacher migration and brain-drain, from a global perspective. Various migration models and international instruments governing migration will be identified and discussed. Chapter 2 will also discuss the costs and benefits of international labour migration, with an eventual focus on cross-border teacher migration, within the context of globalisation. Finally, this chapter will discuss teacher retention strategies and their implications on dealing with brain drain and the management of teacher migration.

International migration is increasingly becoming a global phenomenon and rising to the top of the policy agenda in many parts of the world. The increasing scale, scope and complexity of the issue, as well as challenges and opportunities presented by the cross-border movement of people, especially workers, calls for further investigation of the phenomenon (Global Commission on International Migration, 2005:vii). An investigation of the teacher migration phenomenon, its scale, scope, causes and effects, within the broader framework of international migration and globalisation, through the literature review, enabled the researcher to gain a deeper understanding of the problem being investigated (Bryman, 2008:81).

2.2 MIGRATION CONCEPTS DEFINED AND DISCUSSED

This section defines and discusses the main terms related to migration and international teacher migration. An understanding of these terms and concepts helped the researcher to deepen his understanding of the migration phenomenon.

2.2.1 The concept of migration

As was explained in Sections 1.1 and 1.8, human migration refers to the movement of people from one place to another. Such human movements may be internal or external, as discussed in Section 2.2.3. (Skeldon, 2008:27; Harris, 2007:33).

2.2.2 Migrants (long-term and short-term migrants)

A person who moves from one location to another is known as a migrant. Literature distinguishes between long-term and short term migrants. For example, the International Organisation for Migration (IOM, 2008:495) defines a long-term migrant as a person who moves to a country other than that of his or her usual residence for a period of at least a year, so that the country of destination effectively becomes his or her new country of usual residence. From the perspective of the country of departure (also known as the country of origin, sending or source country), the person will be a long term emigrant, and in the country of arrival (also known as the receiving or destination country) the person will be a long term immigrant. A short-term migrant is defined as a person who moves to a country other than of his or her usual residence for a period of at least three months, but less than a year, except in cases where such movement is for the purposes of recreation, holiday visits, business or medical treatment (IOM, 2008:498-499). To that end, seasonal migrant workers would be classified as short-term migrants. In this thesis, the term ‘migrant teacher’ is used to refer to both short and long-term migrant teachers. However, it should be noted that migration data and statistics usually refer to long-term migrants.

2.2.3 Internal, international migration and international labour migration

Various authors distinguish between internal and international migration. Internal migration takes place within national borders, while international migration takes place between countries or across national borders (IOM, 2008:173). Perhaps a more comprehensive and

technical definition of international migration is the one given by Perruchoud (2004:33), who views it as the movement of persons who leave their country of origin, or the country of habitual residence, to establish themselves, either permanently or temporarily in another country. From this definition, the main features of international migration seem to be a) the movement of people b) moving from one country to another and c) establishing oneself in the destination country. The third aspect would disqualify travellers in transit, visitors or tourists as migrants, since they do not normally intend to establish themselves (either permanently or temporarily) in the country they have visited.

The International Organisation for Migration (IOM, 2006:16) also uses the term ‘transnational migration’ to refer to international migration, and makes a distinction between internal and international migration. The former refers to the movement of people within their country of origin, while the latter refers to the movement of persons across national borders or from one country to another. Skeldon (2008:29) posits that internal migration is usually associated with urbanisation or forced movement of people owing to violent conflict or natural disasters and also argues that the poor tend to move internally and for short periods of time, while the rich tend to move internationally, for longer periods of time and for employment purposes. The latter gives rise to the concept of international labour migration, an important component of labour migration or migration for work-related purposes, the main focus of this study.

International labour migration is defined by Perruchoud (2004:38), as ‘the movement of persons from their home state to another state for the purpose of employment’, while the Organisation for Economic Cooperation and Development [OECD, 2008a:18) defines it as the ‘international mobility of labour’, thus suggesting that this organisation would like to adopt a more positive approach to a concept (migration) that normally evokes negative feelings, or even hostile reactions in many countries (Legrain, 2007:9). Dayton-Johnson, Katseli, Maniatis, Munz & Papandemetriou (2007:23) confirm the OECD’s positive approach to international migration, contrasting it with the European approach, which they claim is static and problematic. In promoting a different approach or what they call ‘the new thinking’, Dayton-Johnson, et al (2007:24) posit: ‘The new system should not be thought of as an immigration system at all, it should be conceptualised as an emerging system of international labour mobility’. From the above discussion, it appears plausible to conclude that the OECD may prefer to use the term ‘international labour mobility’ to ‘international

labour migration' in order to promote a paradigm shift among its member states so that they view immigration from a positive perspective and devise policies that promote migration of the highly skilled into this economic area.

In view of the meaning of international labour migration defined and explained in the preceding discussion above, one may thus define international teacher migration as the movement of educators from one country to another or across national borders. Such movement is usually for purposes of employment, although there may be instances where teachers may be escaping violent conflict or natural disasters.

2.2.4 Brain drain and brain waste

In the same way that some receiving countries may view immigration as a problem, sending countries often view emigration, particularly that of the highly skilled, as a loss. This refers to the concept of 'brain drain', a term related, but not synonymous with skilled labour migration, with the latter not necessarily viewed as a loss by sending countries. Robertson (2006:1) explains that the term 'brain drain' was popularised in the 1950s with reference to immigration to the United States of America. Countries such as the United States of America race to attract 'the best brains' from around the world in order to generate ideas that will lead to innovation and more profits. The 'brains competition', as it were, causes a drain or loss of skills from the sending countries, most of which are developing or small economies. Stalker (2000:107) clarifies the concept of brain drain as representing a considerable loss to countries that have invested in workers' training and skill, while the International Organisation for Migration (IOM, 2008:62) contends that a brain drain occurs where there is clear evidence that migration flows have had adverse consequences for the source economy. Research evidence shows that a relatively large scale emigration of highly skilled workers, particularly from least developing economies, may have adverse effects on economic growth (Castles & Wise, 2008:7; Ochs & Jackson, 2009:1). This would thus imply that the emigration of teachers, as trained and skilled individuals, may be viewed as a brain drain, particularly by the source country, owing to the amount of money spent training the teachers and the departure or loss of these skilled and usually experienced educators.

On the other hand, the term 'skilled migration' seems to have positive or neutral connotations (when compared to 'brain drain') and refers to the cross-border movement or mobility of

workers with low, medium and high skills (Regets, 2008:65). Teacher migration falls within the category of skilled labour migration and the loss or emigration of skilled educators may be viewed as a brain drain. Therefore, many concepts that relate to skilled or highly skilled migration and brain drain would normally apply to teacher migration as well.

Sometimes skilled professionals end up taking up menial, unskilled or semi-skilled jobs in the receiving country, amounting to a waste of skills and experience, a phenomenon described by the International Organisation for Migration (IOM, 2006:127) as 'brain-waste' or 'deskilling'. In her discussion of this phenomenon in the education sector, Degazon-Johnson (2008:7) revealed that Samoan teachers were being recruited to New Zealand as prison warders and bus drivers; Cameroonian teachers recruited to Canada were being employed as domestic helpers, while teachers from Tanzania and Kenya, with Master's level teaching qualifications, were working as child-minders and care-givers in the United Kingdom. She attributed this loss of teachers to the profession to the widespread lack of recognition of teaching qualifications across national borders resulting, not only in brain drain, but also in 'brain waste' (Degazon-Johnson, 2008:7). The researcher hypothesises that, in addition to lack of cross-border recognition of teaching qualifications cited above, brain waste may be caused by a sheer shortage of teaching jobs and bureaucratic hurdles such as delays in the processing or accreditation of foreign teaching qualifications. Anecdotal tales of Zimbabwean teachers working as bartenders, restaurant attendants and other menial workers in South Africa, while waiting for the accreditation of their teaching qualifications are not uncommon.

2.2.5 Return and circular migration

Two other relevant migration-related concepts pertain to return and circular migration. The International Organisation for Migration (IOM, 2008:498) defines return migration as the movement of persons who are returning to their country of origin or habitual residence, usually after at least one year in another country. Return migration occurs when the returning persons are coming back, not just to have a short visit, but to remain in their home country. Although such returns may be voluntary or forced (for example, through deportations), the focus of this thesis is mainly on voluntary returns. Such returns may, or may not be based on incentives, as opposed to sanctions or use of force.

Return migration is also known as ‘brain gain’ or ‘reverse brain drain’ (Perruchoud, 2004:11). Return migration is a gain because returning students or migrant workers come back with new skills, knowledge, expertise and experience which may benefit their home country. The skills and experience acquired abroad, including the capacity to innovate and establish international networks, may contribute to national development, as has been the case in Taiwan, China and India (Steiner, 2009:55). Similarly, returning teachers may have new skills, expertise and experience that may help develop their home country’s education and training system and improve its quality, thus contributing to socio-economic development. Unfortunately, as Degazon-Johnson (2007:3-4) observes, brain gain or brain circulation in the education sector is not happening to any great extent in developing countries, being mainly confined to such developed countries as Australia, New Zealand, the United Kingdom, Canada and the United States of America. This, therefore, implies that many developing countries should have effective return migration policies, create attractive conditions for their foreign based citizens to come back home and help their returning professionals, including teachers, to reintegrate and fully utilise their newly acquired skills, expertise and experience.

Related, but not similar to return migration is the concept of circular migration, also known as brain circulation (Robertson, 2006:3). Circular migration is defined by the International Organisation for Migration (IOM, 2008:492) as the fluid movement of people between countries. While return migration may be considered a case of re-emigration, one in which the new country of destination is the same as the country of origin, in circular migration, the new country of destination may be different from the country of origin (OECD, 2008b:172).

Degazon-Johnson (2007:3) emphasises the continuous movement of migrants in circular migration by calling the phenomenon the ‘Migration Merry-Go-Round’. Just like return migration, circular migration may benefit all countries involved by meeting the labour needs of countries of origin and destination. For example, countries may share scarce human resources for their mutual benefit. As they move around freely, workers may acquire new skills and use them in the new destination country, thereby benefiting the whole region. In addition, regions that normally lose their skilled manpower to overseas countries such as the Southern African Development Community (SADC) may retain some of their highly qualified and experienced personnel, including teachers, by encouraging them to move freely within the region, that is, by promoting intra-regional migration. Such a mobility system is

already in place in Europe as part of what is known as the ‘Bologna Process’. The Bologna Process ensures the free movement of European citizens, workers and students within the European Union (EU). EU nationals are, therefore, free to live, work and study in other EU member states and contribute to the development of the whole region (OECD, 2007:47).

One of the biggest challenges to implementing circular migration schemes in the education sector is that of variable teacher qualification standards across countries, quite often leading to non-recognition and loss of qualified teacher status when teachers migrate (Degazon-Johnson, 2009:15). This thus implies that an effective intra-regional teacher migration strategy ought to address the issue of qualification equivalency and standards.

This section has defined and discussed the term ‘migration’ and other related concepts. What has emerged from this examination is that migration involves the movement of people from one place to another and that international migration transcends national boundaries, as it involves the cross-border movement of people. Teacher migration, including international teacher migration, falls within the broader concept or framework of labour migration, thus, implying that most tenets and principles that apply to this category of migration would normally apply to teacher migration as well.

Having defined migration and related concepts, it is paramount to examine the link between international migration and globalisation. The next section will examine and discuss this link, with a view to shedding more light on the application thereof to the teacher migration phenomenon.

2.3 INTERNATIONAL LABOUR MIGRATION AND GLOBALISATION

International labour migration is integrally linked to globalisation and the global integration of financial markets, as well as markets for the manufacture and supply of goods and services. In that respect, it would be difficult, if not impossible, to separate international migration from globalisation (Council of Global Unions, 2008:1).

2.3.1 What is globalisation?

Globalisation can mean different things to different people. The International Organisation for Migration (IOM, 2008:24) defines globalisation as a multitude of interactions and growing interdependence among governments, organisations, businesses and people across the world. These interactions or processes are diverse in nature and encompass a wide array of social, cultural, technological and political developments. The interdependence and interconnectedness of various countries of the world has reduced our sphere into the so-called 'global village'. An economic-related perspective of globalisation is given by Bhagwati (2004:3) who articulates that globalisation constitutes integration of national economies into the international economy through trade, direct foreign investment, short-term capital flows, international flows of workers and people generally, as well as flows of technology. What emerges from these two definitions is that globalisation is a worldwide phenomenon and that it includes or involves trade and human flows or migration. Apparently, migration is both a product and an integral part of globalisation.

Bhagwati (2004:4) distinguishes between two different types of globalisation, namely, cultural and economic globalisation. The former mainly deals with the cultural aspects of globalisation such as language, religion, entertainment, food and drink, while the latter refers to the economic aspects of globalisation such as trade, investment and the international flows of people or workers. Wolf (2005:14) defines economic globalisation as free movement of goods, services, labour and capital. It is important to note that labour migration also features in this definition, thereby confirming the strong link between globalisation and migration. In this chapter and in the thesis as a whole, the main focus is on economic globalisation and its impact and implications for international labour migration and teacher migration in particular.

2.3.2 The link between international migration and globalisation

First and foremost, it should be noted that international labour migration is both an integral part and product of globalisation, a worldwide phenomenon with permanency status (Bhagwati, 2004:3). This view is supported by Martin (2004:474), who argues that migration is playing out on a global stage in which demographic, economic and security differences are widening between many nation-states, thereby encouraging more and more economically motivated migration. The cross-border flows of trade, capital and labour are necessary in a

global economy and help address the 'global employment challenge' of unemployment (Ghose, Majid & Ernst, 2008:37).

Globalisation has had a profound effect on international labour migration. Sherlley (2007:27) contends that globalisation has generated new demand for and supply of migrant labour, citing the high demand for healthcare workers in Britain, leading to the migration of nurses and doctors from Ghana, South Africa and other developing countries. Furthermore, as the International Labour Organisation (ILO, 1999:7) reveals, the growing interdependency of countries, facilitated by technological developments, means that cross-border transactions in goods, services and capital (including human capital) occur much more frequently than ever before. The growth of communication networks and developments in international transport as a result of globalisation have facilitated international migration, which is viewed by many as a means of escaping poverty, unemployment and other social, economic and political pressures in the home country. As the World Commission on the Social Dimension of Globalisation (2004:96) explains, the advent of cheap mass travel, the information and communication technology (ICT) revolution and the universal reach of the media, as well as the emergence of intermediaries and agents, have meant a vast diffusion of awareness of differences in living standards between rich and poor countries and job prospects, leading to increased migration.

In view of the above, migration, and international labour migration, in particular, is an integral part of globalisation and here to stay. It would, therefore, be futile to try to stop international labour migration altogether, as long as globalisation remains a reality. However, appropriate measures can be taken to manage international migration so that both sending and receiving countries, as well as individual migrants, benefit from the phenomenon.

2.4. INTERNATIONAL MIGRATION FLOWS

In their analysis of the history of migration, Harzig, Hoerder and Gabaccia (2009:8) came to the conclusion that the history of humanity is a history of migration. People have been on the move since time immemorial. For example, homo sapiens migrated out of East Africa to the rest of the world, while the slave trade was a form of forced migration. The colonisation of Africa (mainly by countries in Western Europe) and other regions of the world was characterised by mass international movements of people. International migration from the

Old World (Europe) to the New World (North America, Australia and New Zealand) took place in the early nineteenth century, mainly made possible by a revolution in transport technology and stimulated by the huge demand for labour in the New World. The First World War slowed immigration to a trickle. Whereas international migration before the First World War was primarily from the Old World to the New, since the Second World War, it has mainly been from the Third World to the First World and Europe has switched from being a continent of emigration to a continent of immigration.

The pattern of migration has been heavily influenced by proximity and history such as former colonial ties and language (Legrain, 2007:47). Colonial links probably explain why many British immigrants come from the Commonwealth, while the proximity factor may explain why many South African immigrants come from countries in the Southern African Development Community (SADC).

As was noted in Section 1.1, while migration statistics ‘are often patchy, flawed and inconsistent’ (Legrain, 2007:53), official estimates from the United Nations (UN), based on census figures, indicate that in 2005, 175 million people had been living for over a year outside the country where they were born. By 2006 the number of migrants globally had reached 190.6 million, representing an increase of 8.9% (Ratha & Xu, 2008:1), and constituting nearly 3% of the world’s population, or just one in thirty-five of the world’s population (Legrain, 2007:54). The International Organisation for Migration (IOM, 2010:115) indicates that by 2010 the number of international migrants had risen to 214 million, representing an increase of 12.3% within a period of four years. However, the actual number of international migrants may be higher because some illegal migrants may go uncounted.

The Global Commission on International Migration (GCIM, 2005:83-85) gives the following synopsis of vital migration statistics:

- International migrants constitute 3% of the world’s population.
- The number of international migrants is increasing rapidly: from 82 million international migrants in 1970 to 175 million in 2000.
- Almost half of the world’s international migrants are women (48.6%).
- Sixty per cent (60%) of the world’s migrants live in the developed world.

- The majority of international migrants are found in Europe, Asia, North America, Africa, Latin America and Australia (in descending order).
- The five most important host countries include the United States of America (USA), which is home to 20% of the world's migrants, the Russian Federation (7.6%), Germany (4.2%), Ukraine (4.0%) and India (3.6%).
- The three most important origin countries are China with a diaspora population estimated at 35 million, India with a diaspora of population of 20 million and the Philippines with some 7 million of its citizens living overseas.
- From 1990 to 2000 international migration accounted for 56% of population growth in the developed world and a significant 89% of population growth in Europe.

Several studies conducted recently indicate a growing trend in international skilled migration. For example, in 2005, skilled migrants and their families constituted 50% of migrants entering Australia, Canada and New Zealand (GCIM, 2005:84). The Organisation for Economic Cooperation and Development (OECD, 2008a:74) reveals that, in 2001, 24.3% of the migrants in its 30 member states were highly skilled (had a tertiary education). In Luxembourg, Switzerland, Australia, New Zealand and Ireland, highly skilled migrants were equivalent to more than 15% of the native-born highly skilled in the country. The proportion of highly skilled migrants from developing countries was even higher in Canada, equal to more than 20% of the highly skilled native population. After analysing data from 1965 to 2000, the International Monetary Fund (IMF) concluded that over 60% of highly skilled workers had migrated from the Caribbean to OECD countries (Ochs, 2007:17-18). Sub-Saharan Africa was another major source region for skilled workers, particularly those migrating to Europe, North America (the United States and Canada) and the Pacific (Australia and New Zealand).

Although it is difficult to access comprehensive teacher migration data, recent trends and a few examples illustrate a growing phenomenon (Ochs & Jackson, 2009:x). For example, though conceding that there are no comprehensive figures on the numbers of migrant teachers, De Villiers (2007:70) estimates the number of migrant teachers in the United Kingdom (UK) to be in their thousands, including over 6 000 South African teachers. The United States of America (USA) has 'imported' teachers from the Caribbean, Asia-Pacific and other parts of the world. In its recent study, the American Federation of Teachers (AFT,

2009:9) estimates that 19 000 teachers were working in the USA on temporary visas and that the number of overseas trained teachers being hired in the USA was increasing steadily.

In their analysis of teacher migration trends within the Commonwealth, Ochs and Jackson (2009:4) observed that, in addition to the United Kingdom (UK) and the United States of America (USA) being the main destination countries for migrant teachers from developing countries, Korea, Japan and the Middle East were also becoming preferred destination countries. Migration flows have been particularly affected by changes in migration policy and legislation. For example, in the United Kingdom, the elimination of the Working Holiday visa and creation of the new Youth Mobility Scheme significantly impacted the migration of South African teachers to the UK after the South African Government opted out of the scheme. In addition, the UK's new points-based migration policy and the requirement for migrants to arrive with a minimum amount of funds support saw many South African teachers opt for the Middle East instead where conditions remained more favourable (Ochs & Jackson, 2009:5).

The demand for migrant teachers and other skilled workers in developed countries is likely to continue to increase owing to the aging skilled labour population in these countries, thereby fueling more international labour migration (Dayton-Johnson, Katseli, Maniatis, Munz & Papademetriou, 2007:26). This thus suggests that current teacher migration trends are likely to continue unabated, or even accelerate.

2.5 THEORIES OF MIGRATION

Several theories have been proffered to explain the migration process and why it occurs. Stalker (2008:21) identifies two main theories of migration: the individual and the structuralist approach. In addition, migration theory includes the push-pull model, transnationalism and the migration systems theory. These five approaches served as a theoretical framework for this study on the teacher migration phenomenon in Southern Africa and each one of them is discussed in the following sub-sections.

2.5.1 The individual model

The individual approach, also known as the human capital approach, is centred on the decisions made by an individual to migrate. The individual approach regards each migrant as a rational being who carefully weighs up the available options and looks at the destinations that offer the highest wage rates and the best prospects for finding work. Stalker (2008:21) explains this notion of seeking the best returns as follows:

... just as footloose financial capital roams the world seeking the most profitable opportunities, so individual migrants who are endowed with certain educational qualifications, or expertise, or just plain muscle power, will assess where they can get the best returns on the human capital that they embody.

In view of the above, the individual model presupposes that each migrant is a rational being who can make appropriate judgements concerning potential destination countries, based on best prospects for finding work and better earnings. Castles and Miller (2003:22) link the individual model to cost-benefit analysis by emphasising that the individual decision to migrate is based on rational comparison of the relative costs and benefits of remaining in the area of origin or moving to various alternative destinations. Individuals will choose to migrate if they consider it profitable. This model views constraining factors such as restrictions on emigration and immigration as distortions of the rational market which should be removed.

For individuals to make rational decisions, they would need appropriate tools and means such as accurate information about potential destination countries and wage levels, as well as a certain level of education. Perhaps this model might explain why and how teachers, as educated and 'rational' individuals with the ability to make reasonable judgements about job prospects in different countries, migrate.

It should be noted that, although the above approach is known as the individual model, in reality, the decision to migrate may involve, not just the individual migrant, but the entire family. While the individual model might be useful in explaining the causes and other aspects of migration, its main weakness is that it seems to limit the causes of migration to the rational

initiative taken by individuals to migrate, ignoring external or environmental factors that might be the main driving force. This then begs for another model and the structuralist approach, discussed below, may provide an alternative or complementary perspective.

2.5.2 The historical-structural approach

Castles and Miller (2003:25-26) describe the historical-structural approach or structuralist model as an alternative explanation of international migration having its intellectual roots in Marxist political economy and in world systems theory. This approach stresses the unequal distribution of economic and political power in the world and its effects on the cross-border movement of people. Migration is often seen as a way of mobilising cheap labour for capital. International migration is often criticised for perpetuating uneven development by exploiting the resources of poor countries to make the rich even richer. In light of this model, addressing the challenge of migration would entail dealing with structural causes of emigration such as poverty and low levels of economic development in sending countries.

The structuralist model is further explained by Stalker (2008:22), who compares the migrant within a structuralist approach to a ball in a pinball machine 'knocked around by forces beyond his or her control'. Although this description seems rather extreme and exaggerated, it stresses the significance of external forces as the main drivers of international migration. The structural forces that drive migration could be economic, social or political - pushing people out of one country and pulling them towards another. In the sending country the structural forces pushing emigrants out could be population pressure, land shortage or gender discrimination. In the receiving country, structural forces attracting the immigrant could be a shrinking population, or a shortage of people to work on the land, or the demand for domestic servants. This model may be used to explain the mass exodus or emigration of Zimbabweans, including teachers, in the last decade. The main structural forces at play were political and economic. The structural forces in the preferred destination countries such as South Africa and the United Kingdom have mainly been economic, including the demand for menial labour.

A significant part of the structuralist approach seems to be the same as the push-pull model advanced by neo-classical economists and explained by Harzig, Hoerder and Gabaccia (2009: 62) and Castles and Miller (2003:25). This model is briefly discussed below.

2.5.3 The push-pull model

The push-pull model is probably the most commonly known model used to explain international migration. The push-pull model is a migration theory based on the neo-classical economic perspective (Castles & Miller, 2003:22). The neo-classical economic perspective has its antecedents in the earlier systematic theory of the 19th century geographer, Ravenstein, who formulated statistical laws of migration. The model emphasises tendencies of people to move from densely to sparsely populated areas or from low to high income areas. The push-pull theories perceive the causes of migration to lie in a combination of push factors, impelling people to leave the areas of origin and pull factors, attracting them to certain receiving countries.

Examples of push factors are demographic growth, low living standards, lack of economic opportunities and political repression, while pull factors may be demand for labour, availability of land, good economic opportunities and political freedoms. The United States of America (USA) attracts a lot of labour migrants from Mexico, the Caribbean and other parts of the world, mainly because of its more vibrant economy and relatively higher wages. It is this type of economy that Lauder and Brown (2006:25) describe as the ‘magnet economy’. In this case, the USA has strong pull factors and as a result, the country becomes a preferred destination by many international migrants.

Bhagwati (2004:209-112) relates the push and pull factors to the supply and demand factors in economics, with the former affecting the decision of emigrants to leave and the latter influencing the entry of immigrants. He argues that the improvement of one’s standard of living, enhancement of educational opportunities for one’s children and attraction of better professional facilities are among the principal economic drivers of emigration.

The demand for migrant workers has grown and is likely to surge as a result of the aging population and drastic decline in birth rates in most developed countries. The decreasing birth rates would seem to suggest that the demand for migrant teachers in developed countries might be on the decline, yet current trends show otherwise. While projections made by the United Nations, Educational, Scientific and Cultural Organisation (UNESCO) Institute for Statistics (UIS) show a decline in learner population in developed countries, such decline remains marginal, partly owing to relatively higher birth rates among migrants and the aging

population of teachers, coupled with the locals' apparent dislike of teaching, thus keeping the demand for migrant teachers high (UIS, 2006:100-103).

2.5.4 Transnationalism and networks theory

Globalisation has led to a rapid improvement in technologies of transport and communication, making it increasingly easier for migrants to maintain links with their countries of origin. These developments facilitate the growth of migration, as people tend to move between places where they have economic, social or cultural linkages. This is the very essence of transnational theory, as described by Castles and Miller (2003:29).

Transnationalism is defined by Basch, Schiller and Blanc (in Mazzucato, 2008:71), as the processes by which immigrants forge and sustain multi-stranded social relations that link together their societies of origin and settlement. Transnationalism puts emphasis on the linkages that bind people living in different countries, thus a migrant is a member of a larger group that transcends geographical boundaries. Transnational communities are basically virtual communities which are bound by common business interests, cultural, social or family ties and they communicate regularly. Castles and Miller (2003:28) point out that migrants often follow 'beaten paths' and are helped by relatives and friends already in the area of immigration. These networks, often based on family ties or common origin, usually provide shelter, work and assistance in dealing with bureaucratic procedures or difficult personal circumstances, thereby making the migratory process safer and more manageable.

The concept of transnationalism and networks theory is also explained by Harzig, Hoerder and Gabaccia (2009:79-81), who contend that international labour migration depends on both human or personal resources and social capital or networks a person has developed in the process of socialisation and has augmented in adolescent and adult life. Human capital includes social skills, professional expertise, languages, capabilities and strategic competences, while social capital denotes people's ability to mobilise resources, to use structures and institutions and to form or belong to supportive associations (Harzig, Hoerder and Gabaccia, 2009:79). Migrants and non-migrants pursue their goals and projects in the context of other human beings, the immediate family, the community and society as a whole by means of networks of human relations. For migrants, networks are the connections to both the community of origin and the new community. Sequential or chain migration is based on

networks, whereby migrants or previous migrants send back information and/or prepaid tickets to ‘migrants-in-waiting’ who come to join them in the host country. Thus migrant networks tend to influence migration continuity and expansion, as family members and friends migrate to join their relatives or associates in the destination country. Similarly, networks linking migrant teachers with their families, friends and former colleagues would potentially contribute to an increase in international migration. Cross-border teacher recruitment agencies, which usually advertise in the press and provide vital information on their websites, may be considered a form of network linkage that may facilitate international teacher migration.

International migration data released by the Organisation for Economic Cooperation and Development (OECD, 2008b:36) reveal that about 44% of total migration into the OECD was family-related (family reunification and marriage-related), compared to labour migration which accounted for 14%. The rest was due to free movement involving citizens of the OECD and humanitarian causes. These statistics show that family networks, advanced by the networks theory, help explain why a significant proportion of migrants move across national boundaries. Therefore, it was considered important to take this factor into account when developing the teacher migration management model suggested in Chapter 7.

2.5.5 The migration systems theory

According to Castles and Miller (2003:26), the migration systems theory arose as a result of a critique of the other models, which were considered inadequate in explaining the migration phenomenon. Therefore, this model attempts to include a wide range of disciplines and to cover all dimensions of the migration experience.

A migration system is constituted by two or more countries which exchange migrants with each other. Therefore, the migration systems approach means examining both ends of migration flows and all the linkages between the places concerned. These linkages may be categorised as state-to-state relations and comparisons, mass culture connections and family and social networks (Fawcett and Arnold in Castles & Miller, 2003:26). In world systems theory, migration is induced by the penetration of capitalist markets and production into peripheral societies. Investments spread from the core (developed capitalist societies) to the periphery (less developed societies) and internal and international mobility reflect the flow of

capital and goods but counter its direction, hence migration usually takes place from less developed to more developed societies. Migration systems theory also asserts that migratory movements generally arise from the existence of prior links between sending and receiving countries, based on colonisation, political influence, trade, investments or cultural ties (Harzig, Hoerder & Gabaccia, 2009:74). Thus the migrations from India, Pakistan, Jamaica, South Africa and Zimbabwe to Great Britain are mainly linked to previous colonial occupation, while the Turkish presence in Germany and the Moroccan presence in Belgium is a result of direct labour recruitment by these destination countries in the past.

To sum up, the migration systems approach is part of a trend towards a more inclusive and interdisciplinary understanding of migration, whose basic principle is that any migration movement should be seen as a result of many interacting factors. These may be factors in the sending, receiving or transit country and may be linked to macro and micro structures, with macro structures referring to large scale institutional factors (for example, the political economy of the world market and the laws, structures and practices established by the states of sending and receiving countries to control migration), while micro structures embrace the networks, practices and beliefs of the migrants themselves (Castles & Miller, 2003:27). The systems model's comprehensiveness suggests that it may be the most appropriate tool for analysing international migration, including teacher migration. However, it may be difficult to apply owing to its complexity, mainly related to the combination of the various migration models discussed in Sections 2.5.1, 2.5.2, 2.5.3 and 2.5.4 and the amount of detail involved. The complexity of the migration systems theory may be overcome by using each of the other models to analyse international teacher migration separately, before drawing common conclusions arising from the separate analyses.

This section has discussed five migration models – the individual, structuralist and push-pull models, transnationalism and systems theory. Each of these models seeks to explain the nature and functioning of the migration phenomenon in terms of what the phenomenon represents and why and how it occurs. These models informed the empirical study and guided the researcher in developing a specific model for managing teacher migration in Southern Africa.

2.6 INTERNATIONAL MIGRATION POLICY AND INSTRUMENTS

The United Nations system plays a prominent role in migration policy and practice, mainly through two key agencies, the International Organisation for Migration (IOM) and the International Labour Organisation (ILO). The IOM was established in 1951 and its main mandate is to address the challenges of migration management, advance understanding of migration issues, encourage social and economic development through migration and uphold the human dignity and well-being of migrants (IOM, 2006:24). On the other hand, the ILO, which was established in 1919, seeks to protect the rights and dignity of workers, including those of migrant workers (ILO, 1999:17). Migrant workers are usually vulnerable and liable to exploitation, particularly if they are in an irregular situation and are victims of manpower trafficking (ILO, 1999:17), hence the need for their protection.

2.6.1 The UN Convention on Migrant Workers' Rights

The rights of migrant workers and their families are enshrined in the United Nations (UN) International Convention on the Protection of the Rights of All Migrant Workers and Members of their Families (ICRMW), adopted by the UN General Assembly in 1990. As De Guchteneire and Pecoud (2009:1) disclose, the ICRMW is the most comprehensive international instrument promoting the human rights of migrants. The strength of the Convention lies in enabling all those persons, who qualify as migrant workers under its provisions, to enjoy their human rights regardless of their legal status. Thus, the Convention protects both documented and undocumented workers by setting human rights standards that individual states must guarantee, including freedom of movement and the right to equality with nationals before the law and with respect to remuneration, working conditions and social security. The Convention also guarantees migrants' right not to be subjected to collective expulsions and not to be stripped of their passports and travel documents. There is also a supervisory mechanism through a UN Special Rapporteur on the human rights of migrants, established in 1999. The Rapporteur is in charge of ensuring that member states guarantee the rights of migrants, including those of migrant workers and their families.

Unfortunately, only forty-one (41) states have ratified the United Nations (UN) International Convention on the Protection of the Rights of All Migrant Workers and Members of their Families (ICRMW), with no major immigration country included in this number.

Furthermore, none of the countries included in the empirical study of this thesis (Botswana, South Africa and Zambia) had ratified the ICRMW as of June 2009 (Guchteneire & Pecoud, 2009:437-439). Failure by most countries to ratify the ICRMW suggests that many countries may be reluctant to be bound by the strict provisions of this essential international human rights treaty, leaving migrants at the mercy of domestic law, which does not always sufficiently safeguard their rights and interests.

2.6.2 The Global Commission on International Migration

In 2003, the United Nations (UN) created the Global Commission on International Migration (GCIM), with a mandate to provide a framework for the formulation of a coherent, comprehensive and global response to the issue of international migration. The Commission came up with a set of principles that can be employed by states and the international community as a guide to the formulation of comprehensive, coherent and effective migration policies. The principles, as given in GCIM (2005:4), are:

- Women, men and children should be able to realise their potential, meet their needs, exercise their human rights and fulfil their aspirations in their country of origin, and hence migrate out of choice, rather than necessity. Those women and men who migrate and enter the global labour market should be able to do so in a safe and authorised manner, and because they and their skills are valued and needed by the states and societies that receive them.
- The role that migrants play in promoting development and poverty reduction in countries of origin, as well as the contribution they make towards the prosperity of destination countries, should be recognised and reinforced. International migration should become an integral part of national, regional and global strategies for economic growth, in both the developing and developed world.
- States, exercising their sovereign right to determine who enters and remains in their territory, should fulfil their responsibility and obligation to protect the rights of migrants and to re-admit those citizens who wish or who are obliged to return to their country of origin. In stemming irregular migration, states should actively cooperate

with one another, ensuring that their efforts do not jeopardise human rights, including the right of refugees to seek asylum. Governments should consult with employers, trade unions and civil society on this issue.

- Migrants and citizens of destination countries should respect their legal obligations and benefit from a mutual process of adaptation and integration that accommodates cultural diversity and fosters social cohesion. The integration process should be actively supported by local and national authorities, employers and members of civil society, and should be based on a commitment to non-discrimination and gender equity. It should also be informed by an objective public, political and media discourse on international migration.
- The legal and normative framework affecting international migrants should be strengthened, implemented more effectively and applied in a non-discriminatory manner, so as to protect human rights and labour standards that should be enjoyed by all migrant women and men. Respecting the provisions of this legal and normative framework, states and other stakeholders must address migration issues in a more consistent and coherent manner.
- The governance of international migration should be enhanced by improved coherence and strengthened capacity at the national level, greater consultation and cooperation between states at the regional level, and more effective dialogue and cooperation among governments and between international organisations at the global level. Such efforts must be based on a better appreciation of the close linkages that exist between international migration and development and other key policy issues, including trade, aid, state security, human security and human rights.

The main elements of the above principles may be summarised as the need for states to work collaboratively to ensure the safety of migrants, the human and labour rights of migrants, and recognition that international migration has mutual benefits to both sending and receiving countries relating to economic development and poverty reduction. These principles, together with other findings from the literature review and empirical study informed the teacher migration management strategy presented by the researcher later in this thesis.

2.6.3 The Global Forum on Migration and Development

In 2006, the United Nations (UN) established a Global Forum on Migration and Development (GFMD). The GFMD was established during the UN General Assembly High-Level Dialogue Forum on International Migration and Development. The GFMD provides an international consultation process on migration and development policy and practice. The GFMD met for the first time in Brussels in July 2007 and was attended by 150 governments and a range of international and civil society entities. The meeting confirmed that migrants who are socially and economically protected and empowered are likely to make a more positive contribution in their countries of origin and in the host country. The meeting advised that international migration policies should tie migration planning to development and labour market planning; ensure decent and standard labour contracts; inform, orient and train the migrants; regulate recruiters, employers and other non-state agencies; address gender and family issues; and strengthen diaspora engagement with home country efforts (Council of Global Unions, 2008:1; IOM, 2008:8).

The outcomes of the 2007 GFMD given above have far-reaching implications for managing teacher migration. For example, the outcomes imply that migrant teachers should be properly and fairly recruited, given decent labour contracts and appropriate orientation and training. In addition, their gender and family situation should be taken into account during and after recruitment.

2.6.4 ILO Conventions on migrant workers

The protection of workers employed in a country other than their country of origin has been one of the priority activities of the International Labour Organisation (ILO) since its formation (ILO, 1999:17). The need to protect migrant workers was raised at the first International Labour Conference in 1919 and the obligation to protect the interests of workers who are employed in a country other than their own is specifically stated in the preamble of the ILO Constitution.

The International Labour Organisation (ILO) has also adopted specific standards related to migrant workers. These include ILO Conventions 97 (Migration for Employment Convention), adopted in 1939 and revised in 1949, and 143 (Migrant Workers Convention),

adopted in 1975. These instruments provide a labour migration framework based on core labour standards and decent work. The former stipulates the right of migrants to join trade unions and benefit from collective bargaining, as well as their right to equal treatment with nationals in terms of conditions of service, while the latter requires sending and receiving countries to take all necessary measures to facilitate the reunification of the families of migrant workers.

United Nations (UN) and International Labour Organisation (ILO) Conventions are international treaties with legal force and are subject to ratification by member states. By ratifying a convention the member state signifies that the convention standards are incorporated into national law and the country has become a contracting or state party to the convention (Global Unions, 1998:23). If it is ratified, a convention generally comes into force for that country one year after the date of ratification. Ratifying countries commit themselves to applying the convention in national law and practice and reporting on its application at regular intervals. In addition, representation and complaint procedures can be initiated against countries for violations of a convention they have ratified. However, ratifying ILO conventions is voluntary and a prerogative of each member state. An analysis of the list of countries that have ratified the United Nations (UN) International Convention on the Protection of the Rights of All Migrant Workers and Members of their Families (ICRMW) and ILO Migrant Workers Conventions 97 and 143, reveals that, of the three countries participating in the empirical study (Botswana, South Africa and Zambia) only Zambia had ratified Convention 97, as of June 2009 (Guchteneire, Pecoud & Cholewinski, 2009:437-439). This seems to suggest that there has been reluctance by the other two countries to be bound by the provisions of these international treaties in their domestic migration policies.

In addition to the above instruments, the International Labour Organisation (ILO) has devised recommendations that safeguard the interests of migrant workers. These include the Migration for Employment Recommendation passed in 1949, the Protection of Migrant Workers (Underdeveloped Countries) Recommendation, adopted in 1955 and the Migrant Workers Recommendation, passed in 1975. These recommendations deal with such matters as the preparation and organisation of migration, social services to be provided to migrant workers and their families, in particular before their departure and during their journey, equality of treatment and the regulation of the stay and return of migrant workers and their families (Council of Global Unions, 2008:11; ILO, 1999:18-19). Unlike the Conventions, the

ILO recommendations are not subject to national ratification, nor do they have legal force. However, they have persuasive effect as they provide a useful framework for dealing with migration issues.

The International Labour Organisation (ILO) normally works through a tripartite arrangement involving governments, employers/business and labour. In 1997, the ILO held a Tripartite Meeting of Experts to consider the future activities of the ILO in the field of migration (ILO, 1999:21). This meeting resulted in the adoption of two sets of guidelines for member states aimed at preventing the abuse of particularly vulnerable migrant workers. The first set of guidelines dealt with special protective measures for migrant workers, focusing on such issues as family reunification, provision of accommodation, wages and other terms of employment, freedom of association, social security and conditions of the return of short term migrant workers. The second set of guidelines provided special protective measures for migrant workers recruited by private agencies. These measures provided a framework for the regulation of the activities of recruitment agencies, with a view to curbing malpractices and protecting migrant workers (ILO, 1999:21). Though useful in providing indications of best practice, the main weakness of guidelines such as these is that they have no legal force. Member states or recruitment agencies may simply ignore them without facing any sanctions. However, the regulatory framework they provide can inform and influence migration policy, including the management of international teacher migration.

2.6.5 The ILO/UNESCO Recommendation concerning the Status of Teachers, 1966

The International Labour Organisation (ILO), in collaboration with the United Nations Educational, Scientific and Cultural Organisation (UNESCO) developed the ILO/UNESCO Recommendation Concerning the Status of Teachers in 1966 (ILO & UNESCO, 2008:3). Although the provisions of this recommendation do not deal exclusively with migrant teachers, they provide a comprehensive policy framework for addressing the various factors which affect the status of teachers. For example, Articles 104-107, as given in ILO and UNESCO (2008:38), stipulate that teacher exchange programmes should be encouraged between various countries and that teachers who travel in order to study and work abroad should be given adequate facilities to do so with proper safe-guards of their posts and status. The recommendation also stresses the need for all teachers to enjoy the same or similar conditions of employment, established in consultation with their representative organisations.

Although the provisions of the 1966 recommendation are not binding, they have a strong persuasive effect, more so because of the existence of a joint monitoring mechanism. The two organisations (International Labour Organisation [ILO] and United Nations Educational, Scientific and Cultural Organisation [UNESCO]) work together to support the recommendation (together with the 1997 Recommendation Concerning the Status of Higher Education Teaching Personnel) through the Joint ILO/UNESCO Committee of Experts on the Application of the Recommendations concerning Teaching Personnel (CEART). According to Education International (EI, 2009:2) the CEART meets every three years to examine studies, reports and information concerning the application of the two recommendations cited above. Education International (EI), which represents nearly 30 million teachers (including migrant teachers) often presents written and oral evidence before the CEART, highlighting the extent to which the recommendations concerning teaching personnel are implemented, or not implemented across the globe, touching on different categories of educators, including migrant teachers (EI, 2009:3-4).

2.6.6 The Commonwealth Teacher Recruitment Protocol

The Commonwealth has a policy instrument that can be used to address teacher migration issues, known as the Commonwealth Teacher Recruitment Protocol (CTRP). The CTRP was adopted by Commonwealth Ministers of Education in the United Kingdom on 1 September 2004. This protocol was the culmination of efforts by Education Ministers to respond to teacher migration and the subsequent reduction in the pool of available teachers in developing countries. Of particular concern was an international teacher recruitment drive in wealthier countries that had resulted in a dwindling pool of available teachers and that had caused ‘brain drain’ on the education system resources of many developing countries (Ochs & Jackson, 2009:9).

The main aim of the Commonwealth Teacher Recruitment Protocol (CTRP), as given in Article 2.3.1 of the instrument, is to balance the right of teachers to migrate internationally, on a temporary or permanent basis, against the need to protect the integrity of national education systems and to prevent the exploitation of scarce human resources of poor countries (Commonwealth Secretariat, 2004:7). The CTRP provides a regulatory framework for structured and well-managed teacher mobility, which benefits both the sending and the receiving countries, as well as stipulating the rights of migrant teachers and the

responsibilities of recruiting countries and agencies. Although the CTRP is non-binding, it holds moral authority on the matters it addresses. Commonwealth member states are usually encouraged to apply and uphold its principles, particularly through the Commonwealth Conference of Education Ministers (CCEM), held triennially and the programmatic activities of the Commonwealth Secretariat (Sinyolo, 2010:4). The relevance of the CTRP in dealing with teacher migration issues is evidenced by the fact that it has been endorsed by the International Labour Organisation (ILO) and cited by UNESCO and Education International (EI) as a good model for adoption as an international best practice (Commonwealth Secretariat, 2006:2). Hence, its principles, particularly to balance the rights of teachers to migrate internationally against the need to protect the integrity of national education systems, were taken into account when developing a strategy and model for managing teacher migration in Southern Africa. However, an evaluation carried out by Ochs and Jackson (2009:x) revealed that many Commonwealth member states, including Botswana, South Africa and Zambia, had not fully implemented the provisions of the CTRP. This was mainly because the CTRP was non-binding, only relying on moral force for its implementation.

2.7 THE BENEFITS AND COSTS OF INTERNATIONAL LABOUR MIGRATION

International migration has a number of advantages and disadvantages. The migration phenomenon also presents many opportunities and challenges to both sending and receiving countries. In its examination of the effects of international migration on economic and social development, the International Organisation for Migration (IOM, 2006:1) concludes that there is a two way connection between migration and development, arguing that migration can be both a cause and a result of underdevelopment, while underdevelopment can either be alleviated or exacerbated by migration. Put differently, this means that international migration may have a positive or negative impact on development, be it economic, social or otherwise.

2.7.1 Benefits and costs of international migration to the host country

With regard to the positive effects of international migration to the receiving countries, the International Organisation for Migration (IOM, 2006:1) reveals that migration can bring substantial macro-economic benefits to destination countries through mitigation of labour

shortages, enrichment of human capital and the job opportunities and wealth which results from migrant entrepreneurial activities. A similar view regarding the benefits of international skilled labour migration to the host country is shared by the Organisation for Economic Cooperation and Development (OECD, 2008a:20) which argues that the inflow of talent has positive effects relating to knowledge flows, including the possibility of increased economic activity, owing to the availability of additional skilled workers, improved knowledge flows and potential job creation by immigrant entrepreneurs.

Even unskilled or low skilled migration may be of great benefit to the receiving country, as revealed by Legrain (2007:66), who emphasises that, through their willingness to do unskilled work at lower wages than native people, immigrants fill jobs that would otherwise not exist. Immigrants thus fill many essential jobs that may be shunned by the local population. Examples of migrants working as carers in old people's homes in the United Kingdom, or as restaurant attendants or farm labourers in South Africa are not uncommon, thus proving that immigration can be of great benefit to the receiving country. It is for this reason that Legrain (2007:66) dismisses the notion that immigrants take local people's jobs as 'a mere common misconception'.

Illustrating the economic benefits of international migration, Martin (2004:473-474) argues that doubling the number of migrants in the rich countries, if there were no changes in Gross Domestic Product (GDP) per capita in sending and receiving countries as a result of the migration, could increase global GDP by \$2.8 trillion or 8%. The movement of 10 million migrants would raise global GDP by \$260 billion or 1%, almost five times the annual amount of Official Development Assistance (ODA).

Martin (2004:447) argues that more economic oriented migration should be encouraged by lowering resistance to more migration in destination countries, and asserts that this can be achieved by:

- Selecting migrants in a manner that ensures they will be successful and then compensating their countries of origin so that inequalities between countries are reduced;

- Opening wider channels for less skilled migrants by aligning the incentives of employers with guest worker programmes; and,
- Ensuring that economic differences between sending and receiving countries are narrowed.

In view of the foregoing, international labour migration may have significant benefits to receiving countries, ranging from the mitigation of labour shortages to the creation of employment. These factors can increase the flexibility of the labour market and productivity of the economy and contribute to economic growth.

The Organisation for Economic Cooperation and Development (OECD) seems to recognise the multiple benefits international migration may bring to the economies of its member states by encouraging them to develop policies to attract skilled migrants (OECD, 2008a:18-19). The United States of America (USA) attracts and recruits highly skilled professionals from around the globe through its 'Green Card' scheme by granting migrants permanent residence rights. In addition, the USA offers high-skilled foreigners an opportunity to work as temporary workers by issuing them H-1B visas, which are valid for 6 years. In order to compete with the USA and to attract highly skilled migrant workers, the European Union (EU) is in the process of creating a 'Blue Card'. (Baldwin-Edwards, 2009:133; Steiner, 2009:16). The schemes illustrated above reflect a deliberate policy by developed countries to attract highly skilled and experienced professionals from developing countries in order to meet their own domestic manpower needs and stimulate economic growth. This raises the following question: To what extent are developing countries creating policies to retain their own highly skilled and experienced professionals, including teachers in order to develop their own domestic economies? Some of the answers to this question are examined in Section 2.8 dealing with teacher retention.

The capacity of Organisation for Economic Cooperation and Development (OECD) countries to attract professionals and other skilled workers is particularly important given the region's ageing population. For example, Ochs and Jackson (2009:4) reveal that between 25% and 40% of teachers in industrialised countries are over the age of 50 and will be retiring within the next ten years. If the above estimates are correct, many industrialised countries are likely to experience serious teacher shortages within the next two decades and are likely to turn to

developing countries to mitigate these shortages, thereby accelerating the rate of teacher migration. As a stop-gap measure and to mitigate serious labour shortages and strain on social security, many European countries such as Denmark, Spain and the United Kingdom have responded by raising the retirement age.

Many countries, both low and high-income countries, have met their local teacher needs through migration. Examples of countries that have supplemented their domestic teacher supply needs through migration include Australia, New Zealand, the United Kingdom (UK), the United States of America (USA), South Africa and, most recently, the Middle East (Ochs & Jackson, 2009:x; Castles & Miller, 2003:139). According to De Villiers (2007:68), the UK experienced the highest level of teacher shortages in the years 2000-2001 and most of these were at secondary school level. Most teacher shortages involved special subjects such as mathematics, science, design and technology and home economics. To fill these crucial posts and to mitigate general teacher shortage, the UK had to turn to developing countries, mainly the Caribbean and Southern Africa. Although conceding that there are no comprehensive figures on the numbers of migrant teachers in the UK, De Villiers (2007:70) estimates these to be in their thousands, including over 6 000 South African teachers.

Unfortunately, all migrant teachers from outside the European Union (EU), with the exception of those from a few developed countries such as Australia and the United States of America (USA), are treated as unqualified teachers in the United Kingdom (UK). This means less pay and less attractive conditions of service for the majority of migrant teachers in the UK. The majority of migrant teachers are, therefore, required to achieve Qualified Teacher Status (QTS) before they can be recognised and paid as qualified professionals (Ochs & Jackson, 2009:31). According to De Villiers (2007:70), 3 665 migrant teachers had either completed or were undertaking the overseas-trained teacher programme (QTS) in 2006 and 19.6% of them were South Africans. Non-recognition of teacher qualifications across borders tends to limit the movement of teachers.

The South African Qualifications Authority (SAQA) has undertaken an intensive study on teacher qualifications across 35 Commonwealth member states, at the request of the Commonwealth Steering Group on Teacher Qualifications (Keevy & Jansen, 2010:7). This study resulted in the development of a Pan-Commonwealth Teacher Qualifications Comparability Table to provide the basis for pathways for the recognition of qualifications of

teachers when they move across national borders (Keevy & Jansen, 2010:12). The Comparability Table is a summary of first level teacher qualifications at both primary and secondary school levels in 35 Commonwealth countries. For example, the comparability table shows that the average minimum duration to qualified primary teacher status is 2.6 years, while the minimum duration to secondary teacher status across all the participating countries is 2.9 years. The maximum duration of teacher training (primary) ranges from one year in The Gambia to seven years in Canada. This pioneering work can serve as a basis for making informed decisions on the recognition of teacher qualifications across borders. This information can also be used to develop minimum teaching standards within and beyond the Commonwealth and facilitate the free movement of teachers, for example, within Southern Africa.

The United States of America (USA) has 'imported' teachers from the Caribbean, Asia-Pacific and other parts of the world. In its recent study, the American Federation of Teachers (AFT, 2009:9) reveals that 200 000 new teachers need to be hired across the USA each year, a demand that cannot be met locally. Although the actual number of migrant teachers in the USA is unknown, mainly owing to the unavailability of federal data, the AFT (2009:5) estimates that 19 000 teachers were working in the USA on temporary visas and that the number of overseas trained teachers being hired in the USA is increasing steadily.

The American Federation of Teachers (AFT, 2009:5-17) reveals widespread and egregious abuses of overseas trained teachers, particularly by recruitment agencies. These abuses include unfulfilled promises given to migrant teachers such as the promises of teaching jobs in the United States of America (USA), permanent residency status and family reunion. Migrant teachers were additionally required to pay exorbitant recruitment fees (up to \$ 10 000) and forced to take loans with very high interest rates. Sometimes migrant teachers were housed in hostels in groups of 10 to 15 and had to ask for permission to leave the housing premises. Their original certificates were sometimes confiscated and dissenting voices threatened with deportation (AFT, 2009:17-18). The unscrupulous activities of some recruitment agencies are also confirmed in a Commonwealth study conducted by Ochs and Jackson (2009:61-67). Some of these agencies usually discouraged migrant teachers from joining trade unions, possibly because they feared that the unions would raise the migrant teachers' awareness of their human and trade union rights.

2.7.2 Costs and benefits of international labour migration to sending countries

Labour migration has both disadvantages and advantages to sending or source countries. Nunn (2005:7-8) posits that skills and education are important for development, arguing that human, social and institutional capacity are central to successful development, with education being a key component in building this capacity. In this context, skilled labour is of crucial importance for developing countries to overcome social and institutional barriers to development, yet it is the 'best and brightest' that leave (Castles & Wise, 2008:7).

Nunn (2005:7) reaches the conclusion that brain drain marks a potentially serious barrier to economic growth, development and poverty reduction. Legrain (2007:181) also contends that brain drain can harm developing countries in a variety of ways. He explains that talented and enterprising people create jobs and prosperity for others. When they emigrate, they deprive their country, not only of their skills and experience, but also of these positive by-products/spill-over benefits. The above points are buttressed by the Organisation for Economic Cooperation and Development (OECD, 2008a:44) which concludes that brain drain may affect economic development by holding back the production of goods and services, wasting public expenditure on education and holding back institutional development in less developed countries. In the light of the above, loss of skilled manpower would hamper a sending country's capacity to develop, while promoting growth in the receiving country. Similarly, the loss of teachers in the source countries undermines the ability of schools and education systems to function effectively and inhibits their capacity to produce the requisite skilled manpower required for economic growth and development.

Stalker (2000:107) also contends that brain drain represents considerable loss to countries that have invested in workers' training and skills. In addition, governments may lose out financially (through taxation) from the departure of the country's highest income earners (Legrain, 2007:181). Training skilled professionals like teachers costs a lot of money and takes time. For example, Shelley (2007:26) reveals that the price of survival to the age of 20 of a migrant in a developing country is £2 000 (about US\$ 3 100), meaning that every 20-year old migrant who leaves costs the national economy of his/her own country about £2 000. With each migrant who arrives, an underdeveloped country is subsidising a developed one to that amount.

Most of the countries that lose highly skilled and experienced professionals are small or developing states with very limited resources, while the beneficiaries are usually well-developed countries with the necessary resource capacity to train their own manpower (Legrain, 2007:57). It was for this reason that in 2004, a Commonwealth Teacher Recruitment Protocol (CTRP) was adopted by the association's Education Ministers. As was explained in Sections 1.2 and 2.6.6, the CTRP aims to balance the right of teachers to migrate internationally, against the need to protect the integrity of national education systems and to prevent the exploitation of the scarce human resources of poor countries (Commonwealth Secretariat, 2004:5-7). As a way of mitigating the impact of international teacher recruitment from developing countries, the CTRP encourages recruiting countries to manage domestic teacher supply and demand in a manner that limits the need to recruit from developing countries. In addition, the CTRP calls upon recruiting countries to provide 'compensation' to the source countries. Such compensation may be in the form of technical support for institutional strengthening, capacity building to increase the output of trained teachers in the source countries, or other forms of support agreed between the sending and receiving country (Commonwealth Secretariat, 2004: 9).

What has emerged so far is that international labour/teacher migration has substantial benefits to the receiving countries and considerable costs or disadvantages to the sending countries. Despite the costs of migration to source countries discussed above, international migration may have considerable benefits to these countries as well, as discussed below.

Nunn (2005:9) identifies two major benefits of international migration to source countries, namely, remittances and technology and knowledge transfer. Migrants send huge financial transfers back to their home country, and in some countries remittances are a major source of foreign earnings and livelihoods. The International Organisation for Migration (IOM, 2006:22-23) reports that the global volume of remittances is significant and increasing rapidly. For example, global remittances going through official channels increased by more than 20% from 2001 to 2003, reaching an estimated \$93 billion in 2003. Remittances are an important source of finance for developing countries, whose domestic revenues are usually not sufficient to promote development and provide quality public services, including education. In 2003, for 36 countries the total remittances were greater than both official and private financial flows. Remittances, therefore, constitute an important source of foreign exchange and can have a positive effect on economic growth. For example, remittances can be invested in construction, agriculture,

education and health and help to generate savings. Remittances can also help to alleviate poverty in the source country, particularly for rural households by helping them to smooth income flows and to invest in assets and human capital (IOM, 2008:185). For example, during the hyperinflationary years experienced in Zimbabwe in the past decade, many households were sustained by their relatives and friends in the diaspora (IOM, 2006:199).

The impact of remittances on economic growth is hampered by the fact that most of these cash transfers are used for consumption purposes. For example, a study conducted by the Kenya Diaspora Investment Forum (KDIF, 2006:7) revealed that 82% of the diaspora respondents remit to Kenya for sustenance purposes, thereby implying that only a small portion of remittances is used for investment.

Nunn (2005:9) argues that technology and knowledge transfer can have tremendous economic and other benefits to the source country. For example, migrants may return to their country of origin after a period in the receiving country with enhanced skills, new knowledge and experience. Migrants may also develop networks between developed and developing countries for the purposes of transferring knowledge to their home country. Regets (2008:64) confirms the benefits of international migration to sending countries by arguing that highly skilled diasporans become part of global business and networks that connect their home countries to the world. These connections allow for the facilitated transfer of technical knowledge and create business opportunities for the source country. Such connections, however, are of little benefit to poor countries because they lack skilled personnel and financial capital necessary to take full advantage of new opportunities and knowledge (Regets, 2008:64). Following the benefits of international labour migration discussed above, one would conclude that cross-border teacher migration would provide similar benefits to the sending country. The additional skills and experience acquired by returning teachers would benefit the education systems of their home countries, while the networks they establish may help share teaching and learning resources and methods and improve pedagogical practice.

2.7.3 The costs and benefits of international labour migration to individual migrants and their families

International labour migration may have enormous benefits and costs to individual migrants and their families. Gainfully employed individual migrants may benefit financially and

economically. Salaries may be relatively higher in the host country than in the migrants' country of origin, thus enabling the migrants to realise their long-cherished life-dreams and to support their families through remittances sent to their countries of origin (Steiner, 2007:45). For example, a survey conducted by the International Organisation for Migration (IOM) found that 74% of Zimbabweans working in the United Kingdom and South Africa sent remittances back to Zimbabwe. The bulk of these remittances (85%) were used to support family members, while the rest were invested in various projects, including housing and transport (IOM, 2006:199). Similarly, teachers who migrate may be able to earn higher salaries in the host country, resulting in higher social mobility. In addition, they may be able to send remittances to their families in their countries of origin and to invest in capital and other projects. The new skills, expertise and experience acquired in the host country can have both individual and societal benefits and enable the teacher to perform better. Many migrants, including migrant teachers, can also take advantage of learning opportunities in the destination country and acquire higher qualifications, leading to enhanced income levels.

However, migrants can also face many challenges, both in the host country and their country of origin. Taran (2009:150) observes that, despite the positive experiences of many migrant workers, a significant number of them face undue hardships and abuse in the form of low wages, poor working conditions, absence of social protection, denial of freedom of association and workers' rights, discrimination, social exclusion and xenophobia. The xenophobic attacks on foreign citizens in South Africa experienced in the last few months reflect some of the real and potential dangers faced by individual migrants in a number of host countries. Locals sometimes blame unemployment, crime and other social ills on migrants, instead of putting pressure on their governments to improve their economic and social well-being.

In Europe, there has been a rise of anti-immigration politics and far-right political parties appear to be making in-roads in a number of countries, including Austria, the United Kingdom, the Netherlands and Switzerland. These parties usually refer to public safety and national identity concerns to whip up anti-immigrant sentiments, sometimes blaming foreigners for crime, terrorism and for 'diluting the national culture' (Steiner, 2009:46-47).

Culture shock in the destination country and family separation may also pose a serious challenge to individual migrants, their spouses, children and other members of the family. For

example, a study examining the educational performance of migrant children, conducted by the Organisation for Economic Cooperation and Development (OECD) recently found many migrant children (and their families) lacking local language skills and this tended to impact negatively on their learning outcomes and employment opportunities (OECD, 2010:18).

2.8 TEACHER RETENTION STRATEGIES

A number of recent studies on teacher attrition indicate that migration driven resignation is a major cause of teacher loss in many countries. For example, in a study on teacher supply, recruitment and retention in six countries in sub-Saharan Africa (The Gambia, Kenya, Lesotho, Uganda and Zambia), Sinyolo (2007:53-55) found that teacher migration (both internal and international) was a significant cause of teacher attrition in three-quarters of these countries. The main causes of teacher emigration cited by the participants were low or poor salaries, poor conditions of service, including poor housing or unavailability of accommodation. Failure by their governments to fulfil collective bargaining agreements and delays in the payment of salaries were also given as a major cause of teacher demotivation and loss, particularly, in Zambia, Tanzania and Kenya. Most of the teachers who emigrated were specialists, teaching mathematics and science subjects in secondary schools, the same finding being confirmed by Degazon-Johnson (2008:7), who determined that mathematics, science, languages, and information and communication technology (ICT) teachers are among the most sought after teachers and can command higher income than other teachers.

In their analysis of teacher retention and attrition at secondary school level in sub-Saharan Africa, Mulkeen, Chapman, DeJaeghere and Leu (2007:12-13) describe the phenomenon as a 'haemorrhage' and estimate teacher attrition rates to range between 5% and 30% in different countries of sub-Saharan Africa. They argue that teacher retention is affected by economic factors, as teachers make rational economic decisions about their careers and seek better paying jobs elsewhere. Their findings indicate that teacher attrition is caused by deteriorating conditions of work, particularly large class sizes, insufficient supply of textbooks and teaching and learning materials, as well as poor teaching and living conditions. The same study reveals that teacher attrition is also related to teacher qualifications and experience; the most highly qualified and experienced teachers are usually the most likely to leave, as they can easily get alternative employment elsewhere. The emigration of highly qualified and

experienced educators would certainly compromise the quality of education in the source country, hence the need to take measures to improve teacher retention.

In their study on teacher motivation in sub-Saharan Africa and South Asia, Bennell and Akyeampong (2007:19-20) concluded that poor job satisfaction and low motivation among teachers in developing countries resulted in high attrition rates, including brain drain, corroborating the evidence from Mulkeen et al (2007:12-13). In addition, in its analytical work under the series, *Valuing Teachers*, Voluntary Services Overseas (VSO) identified low teacher salaries and poor conditions of service as a major cause of teacher dissatisfaction, but also contends that some educators leave because teaching was not their first option in the first place (Sarton, Lalla-Maharaj & Parsons, 2009:10-18; Cowan, 2007:47-48; Tudor-Craig, 2002:9). This seems to suggest, therefore, that one of the measures that can be taken to improve teacher retention is to make teaching a first choice profession by improving salaries, other conditions of work and the teaching and learning environment. Improving conditions of service is particularly important, as it reduces wage differentials between sending and receiving countries, a major cause of labour migration highlighted by neoclassical economic theory (Castles & Wise, 2008:21).

The Commonwealth Teacher Recruitment Protocol (CTRP) accords explicit rights and responsibilities to source countries. As indicated in Commonwealth Secretariat (2004:14), it is the responsibility of source countries to manage teacher supply and demand within the country. This responsibility includes developing effective strategies to improve the attractiveness of teaching as a profession and to ensure the recruitment and retention of qualified teachers in areas of strategic importance. Efficient teacher management and retention strategies alluded to above may help keep teachers, who would otherwise emigrate, in the profession in their home country. Public authorities cannot bar teachers from emigrating, since it is teachers' right to migrate internationally (Commonwealth Secretariat, 2004:7), but public authorities can entice teachers to stay by improving their conditions of work.

Effective teacher retention strategies have to address the main causes of teacher loss (brain drain) and mitigate the impact of these push factors. Mulkeen et al (2007:14) suggest two major policy interventions to improve teacher retention, namely, bonding and improving the conditions of work. In the former, teachers are required to sign a bond, usually equivalent to

the period of their training. For example, in Ghana teachers sign a three year bond. If they leave teaching before their initial three year posting is completed, teachers are barred from further deployment in the state sector and the guarantor must pay the bonded amount. In the case of Ghana, bonding has not been very effective owing to the erosion of the bond by inflation and weak enforcement. The latter policy option entails improving teachers' physical, social and professional experience of work.

Mulkeen et al (2007:14) do not favour increasing teachers' salaries to improve retention, arguing that there is little evidence that increased salary alone has long term impact on teacher retention. They also argue that such a policy option would be too expensive to implement. However, Bennel and Akyeampong (2007:31-45) argue that very low salaries and late payment are a major cause of teacher demotivation in many developing countries, alongside excessive workload, general classroom conditions, lack of collegial and management support, poor living arrangements and long distances to work. They argue that improving these conditions, including teacher management and professional support, would consequently improve teacher morale, and, hopefully, teacher retention as well. This, therefore, implies that an effective strategy for managing teacher migration should take teacher attrition and retention factors into account.

This section will be concluded by examining two cases that may be considered examples of good practice, specifically designed to improve teacher retention and address the challenge of international teacher migration. These are from Seychelles and Barbados, described respectively in the Commonwealth Teacher Recruitment Protocol (Commonwealth Secretariat, 2004:14-15) and Ochs and Jackson (2009:21-22). In Seychelles, the Ministry of Education and Youth set up a teacher retention committee in 2004. The committee was mandated to consider ways and means to better promote teacher retention. Some of the committee's notable recommendations included attracting young people to the teaching profession, developing the careers of teachers, reviewing salaries and conditions of service and giving incentives to enhance teacher self-esteem and image. In 2005, the Ministry of Education and Youth in Seychelles conducted a survey asking teachers to indicate the causes of their dissatisfaction and the basis for their departure/termination of employment. Responses identified working conditions, salary and training issues as the main push factors. Following the teachers' recommendations, the government introduced a new salary structure and incentives such as extra allowances for extra responsibilities and perks to attract young

teachers and retain experienced ones. Although brain drain has slowed following the introduction of these measures, some teachers have continued to leave the country, owing to salary differentials that still exist between Seychelles and wealthy Western countries such as the United Kingdom (UK).

In Barbados, the country has developed a policy framework which indicates the categories of teachers who will not be granted leave if recruited overseas. These include teachers who have received specialist training, educators teaching in areas where skills are in short supply, bonded teachers and individuals who have already been granted leave to teach outside the country. In addition to this policy intervention, Barbados has improved the conditions of service for all teachers and recruited returning educators. In this regard Ochs and Jackson (2009:36) confirm that current conditions for teachers in Barbados are comparatively good, which resulted in few teachers wanting to migrate to greener pastures.

What seems to emerge from the examples given above is that a single policy intervention is not sufficient to address teacher attrition and emigration. A combination of several policy interventions may have more impact, hence the need for a systemic or holistic approach to the management of teacher migration.

2.9 CONCLUSION

In this chapter, the researcher has reviewed and analysed literature related to the concept of migration, international labour migration and globalisation and discussed international migration trends, migration theory and international norms and instruments governing the cross-border movement of workers and people in general. In Chapter 2, the researcher has also discussed the costs and benefits of international labour migration to sending and receiving countries and analysed teacher retention strategies and their implications on the management of teacher migration.

What has emerged from this discussion is that international labour migration (the cross-border movement of workers) has become a global phenomenon. The number of people and workers living in a country other than their country of birth continues to increase every year and is projected to accelerate in the coming years. It has also emerged that the migration

phenomenon, including teacher migration, is directly linked to globalisation and is here to stay. Therefore, any attempt to stop international migration may be futile. The only viable option would be to manage migration in such a manner that both sending and receiving countries, as well as individual migrants, benefit from the phenomenon.

Various models may be used to explain the migration phenomenon, why and how it occurs. Below is a summary of the five migration models discussed in this chapter:

- **Individual model** - based on rational decisions made by individuals to migrate. Individuals will migrate if they consider it profitable to do so.
- **Historical-structural approach** - based on the premise that international migration is caused by historical or structural factors such as the uneven distribution of economic and political power. Managing international migration should entail addressing structural causes of emigration such as poverty and low levels of economic development in sending countries.
- **Push-pull model** - international migration is caused by push factors in sending countries and pull factors in receiving countries. Push factors may include unemployment, poverty, political repression or war, while pull factors may include good employment prospects, higher salaries and a good standard of living.
- **Transnationalism and networks theory** - migrants establish and maintain transnational links or networks with relatives and friends in their country of origin. These networks facilitate or lubricate migration flows (migrants are helped by relatives and friends already in the area of immigration).
- **Migration systems theory** - combines the various aspects of the other models given above. A migration system is constituted by two or more countries which exchange migrants with each other. To understand migration, one has to understand the whole system and this requires examining both ends of migration flows and all the linkages between the places concerned.

Each of the above models seeks to explain the migration phenomenon, why and how it occurs. In that regard, each model provides valuable insights into a complex issue and can help explain international teacher migration in Southern Africa and beyond. These models informed the subsequent empirical study and guided the researcher in developing a specific model for managing teacher migration in Southern Africa.

This chapter has also revealed that there are numerous international norms and instruments governing migration, including international labour migration and the cross-border movement of teachers. These include the United Nations (UN) International Convention on the Protection of the Rights of All Migrant Workers and Members of their Families (ICRMW), International Labour Organisation (ILO) Migrant Workers Conventions 97 and 143 and the Commonwealth Teacher Recruitment Protocol (CTRP). These standard instruments seem to have had limited effect in guaranteeing the rights of international migrants (including those of migrant teachers) because they have not been widely ratified or implemented by a number of countries, including Botswana and South Africa. Therefore, any meaningful discourse on international labour migration should also interrogate the reasons for non-ratification of the UN and ILO Conventions and this was taken into account in this study.

An analysis of the literature on the costs and benefits of international labour migration, carried out in this chapter, revealed that international labour migration may have great economic and other benefits to both sending and receiving countries. Having traced the evolution of international migration, the researcher came to a conclusion that there is a gradual shift from viewing international migration, particularly that of the highly skilled, as a problem or brain drain, to regarding it as a mobility system that can benefit both sending and receiving countries. More and more recent literature puts significant emphasis on the migration-development nexus and on a rights-based perspective meant to guarantee the rights of migrant workers and their families.

The last part of this chapter presented teacher retention strategies, drawing on experiences from several countries, including those in the South. What has emerged is that it is possible for countries to devise successful policies for managing and retaining their highly skilled and experienced teachers. Improving teachers' conditions of service and promoting return and circular migration policies may yield positive results.

Having analysed and discussed the migration phenomenon from a global perspective, in the next chapter, the researcher approaches the subject from an African perspective. Particular attention is given to migration trends and issues in Southern Africa, and this includes an analysis of the cross-border movement of teachers in Botswana, South Africa and Zambia.

CHAPTER 3

TEACHER MIGRATION IN SOUTHERN AFRICA: A LITERATURE REVIEW

3.1 INTRODUCTION

In Chapter 2, the teacher migration phenomenon and its various tenets and facets, were discussed from a global perspective. The researcher explained the concept of teacher migration, examined the theories of migration and analysed the causes and impact of teacher migration. The link between teacher migration and globalisation was explained, and it was concluded that labour migration, and teacher migration in particular, was an important aspect and integral part of globalisation.

Chapter 3 presents a further review of literature on migration, labour migration, teacher migration, brain drain and teacher retention, with a specific focus on Southern Africa. In this chapter, the researcher will specifically assess and analyse the magnitude of teacher migration in Southern Africa, its nature, causes and effects, in line with the research aims given in Chapter 1 (see Section 1.4). The chapter will begin with an examination of the broader teacher migration context and policy framework in Africa, before presenting an assessment and analysis of the magnitude, causes and effects of teacher migration in Southern Africa. Finally, there will be a discussion about teacher migration in the three selected countries participating in this study, namely, Botswana, South Africa and Zambia.

A further review of the related literature in this chapter helped the researcher to gain an in-depth understanding of the problem, its context and major components and to identify major principles that guided the development of a strategy for managing teacher migration in Southern Africa.

3.2 THE MIGRATION AND TEACHER MIGRATION CONTEXT IN AFRICA

This section addresses the migration and teacher migration context in Africa by describing the demographic trends, interrogating the reasons for migration and discussing the African Union's (AU) response to the migration phenomenon.

3.2.1 The demographic context

According to the International Organisation for Migration (IOM, 2008:407), the number of international migrants in Africa increased from 16.3 to 16.9 million between 2000 and 2005, compared to Europe and North America with a 2005 total of 44.1 and 44.5 million, respectively. The number of international migrants in Africa in 2010 was estimated to be 19 million – an increase of 2.1 million migrants since 2005. By comparison, the number of international migrants in North America increased by 5.5 million during the same period, reaching an all-time high of 50 million in 2010 (IOM, 2010:127;150). This makes Africa the continent with the lowest growth rate in international migrants. At two percentage points, the continent also registers the lowest proportion of migrants as a share of the total population. The relatively smaller numbers of migrants in Africa, compared with other continents may not come as a surprise, since Africa is predominantly a sending continent, with a significant number of its migrants emigrating to the north. This conclusion is corroborated by Castles and Miller (2003:138-139) who posit that, instead of attracting large volumes of immigrants, sub-Saharan Africa generates significant outflows of intercontinental migrants, mainly to Western Europe, North America and the Arab Region. However, the vast bulk of international migration in sub-Saharan Africa remains within the continent, thus showing the importance of studying intra-regional migration or migration occurring within the sub-continent.

Migrants are widely distributed across the African continent, with a disproportionate number in sub-Saharan Africa, particularly in West and Southern Africa. The Southern African countries with the highest proportion of migrants are Botswana, Lesotho, Namibia, South Africa and Swaziland (IOM, 2008:407). The high proportion of migrants in these countries may be linked to their economies, which are relatively better than those of other countries in the region.

One of the key benefits of international migration to sending countries relates to remittances sent by their citizens living abroad. Remittances can contribute to poverty reduction and stimulate economic and social development (Legrain, 2007:182). In 2009, remittances flows to sub-Saharan Africa were estimated to be US\$30.3 billion. Countries of Southern Africa received nearly US\$1.6 billion in remittances, half of which went to South Africa (IOM, 2010:128-138).

3.2.2 Main reasons for outward migration from Africa

The push-pull model (Castles & Miller, 2003:22) can be used to analyse reasons for outward migration from Africa. The African Union (AU, 2006:2) attributes outward migration from the continent to economic, political and social factors, including poor socio-economic conditions, low wages, high levels of unemployment, poverty and lack of opportunity in many sending countries. These push factors are usually brought about by a mismatch between the rapid population growth and the available resources, low levels of requisite technology and capacity to create employment and jobs at the origin. Poor governance, patronage and corruption, political instability, conflict and civil strife in Southern Africa are also major causes of migration for both skilled and unskilled workers. In addition, the real or perceived opportunity for a better life, high income, greater security, better quality of education and healthcare in the destination countries act as pull factors influencing the decision to migrate. The push-pull factors are intensified by a number of other issues which make migration an attractive option and these include the relatively low costs of migration, improved communication, greater information availability and the need to join relatives, families and friends (AU, 2006:2-3). As already noted in Section 3.2.1, most African migrants go to Western Europe, North America and the Arab Region.

3.2.3 The African Union's response to the migration phenomenon

The International Organisation for Migration (IOM, 2006:304) observes that most governments, including those of African states, consider human resource development and labour as key areas requiring regional integration, thus explaining why the free movement of people and rights of residence and establishment are objectives proclaimed in various treaties and protocols by regional economic communities and organisations.

The free movement of people, particularly within the continent, is an objective of the African Union (AU), which, in 2006, adopted a Strategic Framework for a Policy on Migration in Africa. The Strategic Framework acknowledges that migration has become an important phenomenon in Africa and that cross-border migration creates important economic opportunities and livelihoods. The Strategic Framework attributes an increase in cross-border migration within the continent to deteriorating political, socio-economic and environmental conditions, as well as armed conflicts, insecurity, environmental degradation and poverty.

The Strategic Framework further posits that the globalisation process itself, will also facilitate the movement of people across the various regions in Africa (for example, through regional integration), and to other regions outside the continent. The Strategic Framework serves to provide the necessary guidelines and principles to assist governments in the formulation of their own national and regional migration policies as well as their implementation in accordance with their own priorities and resources (AU, 2006:1). The non-binding nature of the Strategic Framework, evidenced by its stated purpose above, weakens its potential for implementation.

Apparently, the main education policy document of the African Union (AU), the Second Decade for Education in Africa (2006-2015): Draft Plan of Action has not given sufficient attention to the issue of teacher migration. An analysis of the Draft Plan of Action, carried out by the researcher, shows that the document only indirectly addressed some aspects of teacher migration (teacher retention) by stressing the need to improve teacher remuneration, job stability and satisfaction in the continent (AU, 2006:6-7).

However, on a positive note, in 2006 Ministers of Education from African Union (AU) member states issued a Statement on Teacher Mobility and Cross Border Teacher Recruitment. The Ministers declared that they were committed to ensuring that teachers and other education personnel were able to move freely and legally within the continent. They also stressed that no African country should be left without sufficient numbers of teachers and called upon AU member states to put in place measures to ensure that they are able to attract and retain the right numbers and cadres of qualified teachers. In 2010, the AU took additional steps to address the teacher migration phenomenon by commissioning a study on teacher mobility and cross-border teacher recruitment. The study was expected to provide background information for the development of a draft continental cross-border teacher recruitment protocol (Kaluba, 2010:6).

After analysing secondary data from a sample of seven countries, five of them in Southern Africa, Kaluba (2010:1-23), who conducted the study, came to the following essential conclusions:

- The cross-border movement of teachers and employments accompanying them lacked support from policy or strategy framework in source countries, and a more structured

approach would have helped both teachers and source Ministry of Education authorities to manage migration and reintegration of returning teachers.

- Many migrant teachers went to take up new cross-border employment under - informed or misinformed about contractual provisions of their new employment.
- Regional economic communities had not sufficiently addressed the issue of teacher migration.
- Lack of policy frameworks, strategies, regulatory mechanisms or measures vis-a-vis teacher mobility and cross-border teacher recruitment were evident in Ministries of Education, making it difficult for the Ministries to respond appropriately to teacher mobility and organised international recruitment of teachers.

In view of the above, there is a major policy and strategic framework gap in the management of teacher migration and mobility in Africa. This doctoral thesis seeks to address the above policy gaps by creating a model for the management of teacher migration in Southern Africa. Such a model could be adapted and applied within and beyond the Southern African region.

3.3 THE MIGRATION CONTEXT AND TEACHER MIGRATION IN SOUTHERN AFRICA

In this section, the researcher discusses labour and teacher migration in Southern Africa, including the migration context, the stock of migrants in the region, migration patterns, causes and impact, as well as the teacher migration scenario in Botswana, South Africa and Zambia.

3.3.1 The migration context in Southern Africa

As was discussed in Section 1.2, Southern Africa falls within the Southern African Development Community (SADC) Region. The SADC's main goal is to achieve economic integration among its member states. However, the organisation has several social and human development programmes, some of them dealing with education and training, including the migration and mobility of students and staff. For example, the organisation has an Intra-regional Skills Development Programme and a Technical Committee on Accreditation and Certification, which seeks to harmonise the education and training systems in the region. In

addition, the institution has a Protocol on Education and Training, which commits the SADC member states to work towards the relaxation and eventual elimination of immigration formalities to facilitate freer movement of students and staff within the region for the specific purpose of study (SADC, 2008:2). The provisions of the Protocol on Education and Training, which was ratified by almost all the member states in 1997, imply that the SADC supports learner and staff mobility in the education sector. This is in line with the migration-development nexus school of thought, which seeks to emphasise the benefits of international migration, as opposed to its losses or brain drain (Pecoud & De Guchteneire, 2007:12).

Peberdy and Crush (2007:187) argue that attempts by the Southern African Development Community (SADC) to promote the free movement of nationals have been fraught with problems and have only started to make progress from 2005 onwards. The first protocol generated by the SADC, the Draft Protocol on the Free Movement of People (Free Movement Protocol), was completed in 1995. The Free Movement Protocol had far-reaching provisions designed to promote the free movement of people across the SADC region, including visa free entry from one state to another and the right of any SADC citizen to reside in another SADC state. Fearing an influx of immigrants from neighbouring countries with less developed economies and political push factors, South Africa, Botswana and Namibia rejected the Free Movement Protocol, leading to the development of a new migration instrument, the Draft Protocol on the Facilitation of Movement of Persons in the Southern African Development Community (Draft Facilitation of Movement Protocol), in 1997 (Makochekanwa & Maringwa, 2009:11). The change from 'Free Movement' to 'Facilitation of Movement' implies that the SADC countries shifted their emphasis from targeting free movement of persons as the main objective to a lesser aim of facilitation of movement of persons. The Draft Facilitation of Movement Protocol was accepted and approved in principle in 1998, but the instrument was put on hold until 2005 when it was then approved by SADC member states. However, the protocol remains a draft, as it has to be signed by at least nine member states for it to become operational. As Makochekanwa and Maringwa (2009:11) further reveal, only seven SADC member states, namely, Lesotho, Mozambique, Namibia, South Africa, Swaziland, Zambia and Zimbabwe have signed the draft protocol. Botswana, one of the three countries participating in this study, alongside South Africa and Zambia, has not signed the draft protocol, despite the fact that it hosts the SADC office, implying that the country is not in favour of promoting the free movement of people within the SADC region.

Some of the major impediments or disincentives militating against the signing of the Draft Facilitation of Movement Protocol include the fear of an influx of immigrants and protectionist tendencies by some of the SADC member states, the existence of bilateral agreements covering migration between several member states and lack of funding for implementing the protocol (William & Carr, 2006:5). The continued absence of a comprehensive regional migration instrument leaves the management of the cross-border movement of people in the SADC region to national policies and legislation, which are, by and large, inward-looking and protectionist in nature (Peberdy & Crush, 2007:190).

The Facilitation of Movement Protocol differed from the Free Movement Protocol in that it did not commit member states to a process with a time table and goals and subjected its provisions to national legislation (Peberdy & Crush, 2007:191), thus weakening its authority and chances for effective implementation.

3.3.2 Stock of migrants in Southern Africa

According to the International Organisation for Migration (IOM, 2010:138), the total migrant stock in Southern Africa reached 2.2 million people in 2010, with an annual increase of 7.3% since 2005. The stock of international migrants as a percentage of total population increased from 2.7% in 2005 to 3.7% in 2010. Botswana and South Africa experienced the highest number of migrant inflows, particularly as a result of economic growth and political and economic crises in neighbouring countries, especially Zimbabwe.

3.3.3 Migration patterns, causes and impact: evidence from SAMP and other surveys

As was discussed in Section 1.2, several studies on international migration in the Southern African Development Community (SADC) region have been conducted by various individuals and organisations, notably by the Southern African Migration Project (SAMP), the International Organisation for Migration (IOM), the Commonwealth Secretariat, academics and researchers (Pendleton, 2008:35).

The Southern African Migration Project (SAMP) has conducted four major regional migration projects, the National Immigration Policy Survey (NIPS), focusing on the attitudes of local citizens towards migrants and refugees and proposing various migration policy

options for dealing with immigration, the Potential Skills Base Survey (PSBS), highlighting the migration behaviour and intentions of skilled nationals and skilled foreigners, the Cross Border Migration and Remittances Survey (MARS), analysing the development potential of the SADC diaspora and the Migration and Poverty Survey (MAPS), examining the relationship between poverty and migration. The SAMP surveys covered both internal and international migration across the region. The countries covered were Botswana, Lesotho, Malawi, Mozambique, Namibia, South Africa, Swaziland and Zimbabwe and the main focus of the surveys was migration in general, and labour migration in particular. Although none of the SAMP surveys focused specifically on teacher migration (Pendleton, 2008:36), their findings provide relevant and useful information on migration patterns in the region, its causes, impact, benefits and costs, as illustrated below.

The main findings from the Southern African Migration Project (SAMP) surveys reveal that South Africa is the main regional destination, followed by Botswana. South Africa is both a receiving and a sending country, with most of its emigrants going to such developed countries as the United Kingdom (UK), Australia, Canada and the United States of America (USA). The main sending countries in the region are Zimbabwe, Mozambique and Lesotho. The decision to migrate is mainly influenced by multiple factors, the most important of which are economic and family networks, political stability concerns, health and living conditions and access to schooling. Although most of the migrants were male (65%), increased female migration is becoming a major characteristic of the present and future migration patterns in Southern Africa (Crush, 2008:26; Pendleton, 2008:37-38).

The International Organisation for Migration (IOM) has also undertaken studies in selected countries in the Southern Africa region. For example, a study on general migration and development was carried out in Angola and Zambia in 2004 (Ammassari, 2005:1-92) and in Zimbabwe in 2005 (Bloch, 2005:1-93). The overall aim of the first study was to gain a better understanding of the general migration situation of these two countries, and concluded that Angola had experienced strong return migration owing to peace and a strong economy, while Zambia continued to be predominantly a sending country, mainly owing to its poor economy. The overall aim of the second study was to obtain a profile of Zimbabweans in the United Kingdom (UK) and South Africa in terms of their skills base, transnational links and interest in contributing to development in their country of origin. The study revealed that Zimbabwe had shifted from being a country of immigration to being a country of emigration, mainly

owing to economic and political push factors. De-skilling and re-skilling were common among Zimbabweans in the diaspora. The former was exemplified by the number of highly-skilled Zimbabweans working in menial jobs, while the latter was demonstrated by the number of Zimbabweans acquiring new skills through education and work (IOM, 2006:129).

Nunn (2005:1) reviewed available literature on brain drain, with a specific emphasis on its impact on developing countries in Africa and on academic labour in the UK. Nunn (2005:7) argues that the loss of teachers undermines the ability of schools and education systems to function, and that brain drain is a serious barrier to economic growth, development and poverty reduction. The author reveals that the push factors driving academic brain drain include a lack of life chances, low living standards, political and social instability, a lack of opportunities to utilise skills and natural disasters. The pull factors include higher wages, job opportunities, good working conditions, freedom from political instability and the use of immigration policies meant to attract skilled migrants. Nunn (2005:65) recommends the development of protocols to regulate international recruitment practices, a measure which had already been undertaken by the Commonwealth when it developed the Commonwealth Teacher Recruitment Protocol (CTRP) in 2004 and indicated what the African Union Commission was planning to do in the near future (Kaluba, 2010:36).

3.3.4 Xenophobia and regional attitudes to migration and migrants

Xenophobia and hostility to migrants are common in some countries in the Southern African Development Community (SADC) region, particularly in South Africa, Botswana and Namibia (Pecoud & Paul, 2007:182). A study carried out by the Southern African Migration Project (SAMP), cited in Pecoud and Paul (2007:182), suggests that nationals of Botswana, Namibia and South Africa are particularly intolerant of non-nationals, especially of African non-nationals. The 2001-2002 SAMP survey revealed that nationals of these and other countries in the region had strong national identity but very little regional consciousness, a possible explanation for the general hostility some of the citizens of these countries have towards immigrants.

The abuse of migrants' rights in South Africa, which was common during Apartheid, has continued unabated after the new democratic order which was ushered in 1994. Xenophobia and hostility have normally involved verbal and physical attacks on non-nationals, as well as

the destruction of their homes and businesses (Crush, Williams & Nicholson, 2009:257). Sporadic xenophobic attacks have occurred in South Africa's recent history, notably in 2006, 2008 and 2010. The 2008 attacks on foreigners resulted in the deaths of 62 people and the displacement of over 38 000 migrants, attracting strong condemnation from the United Nations (UN), the South African Government and civil society (Friebel, Gallego & Mendola, 2011:5).

Xenophobia is unacceptable and counter-productive, as it undermines efforts for regional integration and allows the exclusion and marginalisation of non-nationals, including those who are in the country legally. Most important, it is a violation of human rights and the rights of migrants enshrined in the United Nations (UN) International Convention on the Protection of Migrant Workers and Members of their Families (ICRMW) and other international norms and instruments and should be condemned in the strongest of terms (Pecoud & Paul, 2007:183; Crush, Williams & Nicholson, 2009:247-273).

3.3.5 Migration, labour migration and teacher migration in Botswana

According to the International Organisation for Migration (IOM, 2010:138), Botswana is the third major migration destination country in Southern Africa, after South Africa and Namibia. The country is home to 115 000 migrants. In 2010, migrants constituted 5.8% of Botswana's population, a significant increase from 3.2% in 2000. In the last decade Botswana and South Africa experienced a surge in the number of migrants, both as a result of higher rates of economic growth and political and economic crises in neighbouring countries, especially Zimbabwe.

Botswana is also a sending country, although migration data suggests that the Botswana's trips were mostly short and 'purpose-oriented' for shopping, visits and holidays, with few seeking employment or extended residence abroad (Lefko-Everett, 2004:1). Remittance inflows in Botswana increased from \$141 million in 2007 to \$158 million in 2009, amounting to 1.1% of the country's Gross Domestic Product (GDP) (IOM, 2010:139-140).

Immigration to Botswana is regulated by the Immigration Act of 1966, which allows unrestricted entry for nationals from most countries in the region. A new amendment to the Immigration Act was introduced in March 2004 to increase punitive measures against those

who violate migration regulations. The Botswana government's response to illegal immigrants, mainly from Zimbabwe, has been generally harsh and characterised by detentions, fines and deportations. The country's overwhelmingly negative response to new Zimbabwean arrivals has fostered increasing and pervasive xenophobia on the part of Botswana across the country, and this has contributed to a growing sense of impermanence and insecurity among legal and illegal migrants alike (Lefko-Everett, 2004:3).

Botswana has been a net receiver of teachers. The administrative data from Botswana provided in 2006 recorded that 4.5 % of the teachers were expatriates. In government secondary schools, the proportion of expatriate teachers rose to 15%. The private school sector was almost exclusively run by expatriate teachers and the majority of foreign teachers in Botswana were from Ghana, Kenya, Swaziland, Zambia and Zimbabwe. The main pull factors attracting foreign teachers to Botswana included relatively higher salaries and better conditions of service, while the push factors in their home countries included poor salaries and conditions of service, as well as political factors, particularly for Zimbabwean teachers (Appleton, Sives & Morgan, 2006b:774).

3.3.6 Migration, labour migration and teacher migration in South Africa

South Africa is the country with the largest stock of migrants (1.863 million) in Southern Africa. The number of migrants grew from 1.002 million in 2000 to 1.249 million in 2005 before rising to 2 million in 2010. According to 2010 data, migrants constitute 3.7% of South Africa's population. The country receives the largest volume of remittances from its foreign-based nationals, at US\$805 million. In 2009, migrants working in South Africa remitted over US\$1.1 billion to their home countries, making it the top sending country in the region (IOM, 2010:138-140).

3.3.6.1 Outward skilled migration and its causes

A survey conducted jointly by the Africa Institute of South Africa and the Southern African Migration project (SAMP) defined a skilled South African as a citizen, 20 years of age or older, who has matriculated, has a technikon diploma or university degree and is currently economically active (Waller, 2006:2). The above survey revealed that skilled South Africans were emigrating mainly to such developed countries as the United Kingdom, the United

States of America, Australia and New Zealand. The majority of those who were emigrating were white. The main push factors cited by the respondents were the poor upkeep of public amenities, high levels of taxation, the high cost of living and their families' safety in South Africa. Overall, the majority of skilled South Africans believed that overseas destinations offered greater income and safety for themselves and their families (Waller, 2006:3-4).

The above findings are confirmed by Manik (2010:8) who examined the migration of South African teachers into the United Kingdom (UK). She reveals that the majority of South African teachers recruited into the UK were newly-qualified, single and white, below the age of 29, while experienced teachers were Indian, between the ages of 29 and 42. Manik (2010:8) notes that African teachers were not recruited owing to gate-keeping strategies by recruitment agencies, as candidates were needed to have a professional teaching qualification and fluency in English. She posits that many African teachers were less-qualified owing to Apartheid, which promoted a dual education system with less opportunity for blacks. The main reasons for emigration were financial, career development, global work experience, travel opportunities within the UK, the impact of numerous policy changes being suddenly effected in South Africa and problematic school environments. The South African teachers who migrated to the UK were hired and paid as unqualified teachers until they earned Qualified Teacher Status (QTS) and usually found learner discipline in British schools more challenging than in South Africa.

3.3.6.2 The impact of teacher emigration from South Africa

Although the exact number of South African teachers leaving to teach abroad is unknown (Ochs & Jackson, 2009:25), according to Nunn (2005:56), a head-count of academic staff teaching in the UK Higher Education Institutions (HEIs) carried out in 2002 revealed that there were 268 South Africans working in the UK HEIs. This was by far the highest number of academic staff from any African country, the closest being Nigeria with 153, Egypt with 129, Mauritius with 88 and Zimbabwe with 77.

In their study, Appleton, Sives and Morgan (2006a:121) assessed the impact of international teacher migration on Southern Africa and their study focused specifically on South Africa and Botswana. This was a micro level study concentrating on individual schools in the two countries. The authors reveal that South Africa has been a net sender of educators, mainly to

the United Kingdom and that the country has been at the forefront of protest about international teacher mobility. All the 16 schools participating in the study had been affected by international teacher migration and each school had lost three teachers on the average between 2000 and 2004. Most of the educators who emigrated, such as mathematics and commerce teachers, were usually hard to replace and this negatively affected the quality of education in the affected schools. A peer review study carried out by the Organisation for Economic Cooperation and Development (OECD) in 2008, reveals that the majority of South African teachers who emigrate are young, observing that the loss of young teachers is a drain on the vitality of the teaching force (OECD, 2008c:299).

3.3.6.3 Inward teacher migration

South Africa has a significant shortage of qualified teachers and teacher shortages are projected to reach critical levels in the next few years. Appleton, Sives and Morgan (2006:124-125) mainly attribute this to the policy shift in the training of teachers in 2000, from provincial teacher training colleges to national Higher Education Institutes (predominantly universities). The above authors posit that this reform was meant to improve the quality of teacher training and to reduce the perceived oversupply of teachers. As a result of these reforms, the number of newly-qualified teachers is substantially below the number of teaching posts that become vacant each year. For example, in 2006, the number of students studying for Bachelor of Education (B.Ed.) and Postgraduate Certificate in Education (PGCE) courses stood at 39 000, implying a flow of around 9 000 newly-qualified teachers each year compared to the annual average attrition rate of 20 000 teachers. This estimate leaves South Africa with an annual shortfall of more than 10 000 teachers, forcing the country to turn to other countries to fill the gap.

According to Ochs and Jackson (2009:25) the exact number of migrant teachers in South Africa is not known owing to lack of a systematic and comprehensive mechanism for capturing data. However, in 2009 the Department of Education reported that there were 1 345 foreign educators in South Africa, most of them mathematics and science teachers from Zimbabwe. This number was determined on the basis of applications received by the Department of Education and did not thus include the number of migrant teachers working in private schools. This number appears to be quite conservative, particularly bearing in mind that the teacher output from universities remains much less than the total number of teachers

lost per year, thus suggesting that higher numbers of migrant teachers might have been recruited to fill the gap. Nevertheless, the Department of Education also reported that it was intending to recruit teachers from Kenya, Egypt and India to meet its annual shortfall. Migrant teachers working in South Africa are usually recruited through recruitment agencies or through contact with friends or relatives (Ochs & Jackson, 2009:26).

In view of the foregoing, the researcher views the recruitment of educators from Zimbabwe and other countries to fill the teacher shortage gap in South Africa as a short-term measure, difficult to sustain over a longer period of time unless other strategies are employed. The researcher, therefore, contends that the most sustainable way of dealing with South Africa's teacher gap is to increase output from universities and other teacher training institutes and this might necessitate revisiting the policy of provincial teacher training colleges. Reducing teacher attrition and improving teacher retention through better conditions of service and other measures may also help to bridge the teacher gap.

3.3.7 Migration, labour migration and teacher migration in Zambia

Zambia is not immune to forces of globalisation and the migration phenomenon. The International Organisation for Migration (IOM, 2006:342) observes that although Zambia is not usually counted among the major countries affected by international labour migration, the level of emigration and brain drain is very high, particularly in the health and education sectors. In 2006, the number of Zambians living in Organisation for Economic Cooperation and Development (OECD) countries was 34 825 and nearly half of them (49.3%) were highly skilled, which suggested that the level of skilled labour migration from Zambia to developed countries is quite significant. For example, a growing number of health workers were moving directly overseas to Europe, North America, Australia and New Zealand (IOM, 2006:344).

In the region, the major destination countries for Zambian professionals are South Africa, Botswana and Namibia. The International Organisation for Migration (IOM, 2006:344-345) reveals that in the 1980s, a large number of Zambian teachers left the country to fill skills gaps in the education sector in Botswana. The same findings were confirmed by Sinyolo (2007:55), who discovered that brain drain was particularly a problem in the secondary education sector in Zambia. Most Zambian teachers who left for greener pastures went to Botswana, South Africa, Swaziland, Namibia and Angola.

The main push factors driving the emigration of skilled professionals from Zambia may be attributed to the country's economic crisis, which started in the 1980s, high inflation and devaluation of the national currency, deterioration of economic infrastructure and social services, leading to poor salaries and deteriorating working conditions. The Zambian brain drain in the late 1980s and 1990s was accelerated by structural programmes prescribed by the International Monetary Fund (IMF) and the World Bank. These international financial institutions imposed drastic measures involving civil service retrenchment, voluntary retirements and salary freezes, resulting in the departure of qualified public service professionals, including education personnel, to the private sector and across national borders (IOM, 2006:344-347). In addition to low salaries and poor conditions of service, the emigration of teachers from Zambia was caused by lack of accommodation and serious delays in the payment of allowances (Sinyolo, 2007:55).

3.3.7.1 Labour migration policies in Zambia

The International Organisation for Migration (IOM, 2006:349-352) observes that Zambia lacks a comprehensive and coherent migration policy. Migration issues are dealt with in a piecemeal and fragmented manner in various government departments, particularly education, health and labour. For example, the Ministry of Education offers overseas scholarships to teachers. The beneficiaries are bonded in order to encourage them to return to Zambia, but this has not really worked in practice partly because of poor monitoring, resulting in a number of beneficiaries seeking employment abroad after completing their studies. The Ministry of Labour and Social Security has developed a National Employment and Labour Market Policy (NELMP) which identifies brain drain as a major challenge. The NELMP seeks to address the brain drain challenge by promoting the return and retention of qualified Zambian professionals working abroad, with limited success. Donor agencies have also devised programmes to support the government to develop and retain workers' skills. However, most of these interventions are limited to the health sector, leaving the education sector susceptible to brain drain.

The Ministry of Home Affairs has an Immigration Department whose core mandate is to regulate entry, stay and exit to, and from Zambia. This is done through the enforcement of the Immigration Act, Chapter 123 of the Laws of Zambia. In addition, Zambia has ratified the International Labour Organisation (ILO) Convention Number 97, Migration for Employment.

However, the Immigration Department does not have comprehensive data regarding outflows and inflows of people, a situation also common in many other countries (IOM, 2006:349-352). Lack of comprehensive data on the number of emigrating and returning Zambians may inhibit effective migration policy development and planning, thus suggesting that an effective teacher migration policy or strategy should include the systematic collection of data.

The International Organisation for Migration (IOM, 2006:358-361) suggests a number of recommendations to improve the management of labour migration in Zambia. These include:

- Improving migration data collection and analysis;
- Developing a centralised migration policy structure;
- Strengthening bonding systems;
- Expanding retention schemes;
- Involving the diaspora in private sector activities;
- Enhancing financial transfers from abroad; and,
- Improving infrastructure and service delivery.

While the above recommendations are plausible, none of them seems to sufficiently address and promote the mobility of skilled professionals between Zambia and other countries in the region and beyond. This may be attributed to the fact that the Zambian Government generally views skilled labour migration as a brain drain (loss) than a brain gain (Peberdy & Crush, 2007:187-191). The free movement of teachers and other professionals can be of mutual benefit to Zambia and other countries in the region through cultural exchange and sharing of knowledge and skills. When teachers move freely across countries (brain circulation) they acquire new skills and experiences which can be of benefit to their home country when they return. Receiving countries can also benefit from the skills of teachers from other countries (Legrain, 2007:182).

3.4 CONCLUSION

In this chapter, migration, skilled labour migration and teacher migration were discussed. The chapter presented an analysis of the magnitude, causes and impacts of cross-border migration and teacher migration in Southern Africa, with a particular focus on Botswana, South Africa and Zambia. The chapter also presented the broader context of migration in Africa;

concluding that the African continent is predominantly a sending region, with large volumes of outward migration. The main push factors are politically and socially related, including poor socio-economic conditions, low wages, high levels of unemployment, poverty and lack of opportunity. Africa's response to the migration phenomenon and teacher migration has been sluggish, resulting only in the development of a non-binding Strategic Framework for a Policy on Migration and the issuing of a Statement on Teacher and Cross-Border Teacher Recruitment in 2006. An African protocol on teacher migration and mobility is yet to be developed, following a decision made by the African Union Commission in 2010.

The migration scenario in the Southern African Development Community (SADC) is not very much different from the rest of the continent. The Southern African region loses skilled professionals, including teachers to more developed countries, particularly Europe, North America, Australia and New Zealand, and recently, to countries in the Middle East. The push factors are mainly economic and political in nature and are compounded by a number of other issues which make migration an attractive option. These attractive options include the relatively low costs of migration, improved communication, greater information availability and the need to join relatives, families and friends overseas. Southern Africa also experiences intra-regional or South-to-South migration, with South Africa, Botswana and Namibia being the main destination countries, owing to their relatively more developed economies compared to their neighbours. The main sending countries in the region include Zimbabwe, Zambia and Mozambique, although literature does not seem to indicate the occurrence of teacher migration in the case of the latter. Xenophobia is a challenge affecting a number of Southern African countries, with South Africa experiencing several sporadic attacks on foreign nationals, particularly, in the last five years.

The Southern African Development Community (SADC) has responded to the migration phenomenon in the broader context of regional integration, which is one of the fundamental values of the SADC. Through the Intra-regional Skills Development Programme and Protocol on Education and Training, the SADC has sought to harmonise the education and training systems of different countries in the region and to promote freer movement of students and staff within the region for the specific purpose of study, research and any other pursuits related to education and training. Furthermore, the regional body devised the Draft Protocol on the Facilitation of Movement of Persons in the Southern African Development Community (Draft Facilitation of Movement Protocol) in 1997. The Draft Protocol was

revised in 1998 and signed by six SADC member states in 2005. However, the protocol remains a draft, as it has to be signed by at least nine member states for it to become operational. The absence of a comprehensive regional migration instrument leaves the management of the cross-border movement of people in the SADC to national policies and legislation, which are, by and large, inward-looking and protectionist in nature.

To sum up, evidence from the literature review carried out in this chapter points to the scarcity and incompleteness of migration data and inadequate and incoherent migration policy responses from governments in the Southern African Development Community (SADC) region. Continental and regional efforts to manage skilled labour and teacher migration and mobility have not been fully supported by the member states, resulting in poor implementation.

Chapter 4 presents a discussion of the methodology of the empirical study. In this chapter the population, sample size, data collection techniques and the methods of analysis employed are discussed.

CHAPTER 4

EMPIRICAL RESEARCH METHODOLOGY

4.1 INTRODUCTION

The purpose of this research was to develop a strategy for analysing, understanding and managing teacher migration in Southern Africa. Chapter 1 highlighted the problem statement, aims, objectives, methodology and structure of the thesis, and presented the theoretical and conceptual framework of the study. Chapters 2 and 3 reviewed literature on migration, labour migration and teacher migration globally and in Southern Africa, respectively. The literature review revealed that teacher migration is a worldwide phenomenon and inevitable in today's globalised world. Furthermore, the literature study showed that teacher migration can be managed to bring about optimal benefits to individual teachers and their families and to both sending and receiving countries. Chapter 4 describes the empirical research conducted. This chapter specifically describes the research design and methodology which was applied in the empirical research, the population, sampling procedures, data collection techniques, instruments, methods of analysis and the ethics guiding the research.

The main problem statement raised at the beginning of this thesis related to how teacher migration can be managed in order to balance the rights of teachers to migrate internationally against the need to protect the integrity of national education systems and to prevent the exploitation of poor countries' human resources (see Section 1.4). In order to tackle this major problem statement, the study investigated the following questions:

- What is the statistical scope of teacher migration in Southern Africa in terms of countries, gender, age group, skill level and subjects most affected?
- What are the main causes of teacher migration?
- What are the main effects of teacher migration?
- What are the main principles and guidelines that can be formulated to manage teacher migration?

- What are the parameters and essential features of a viable strategy for managing teacher migration?

The research questions embody the main interconnecting thrusts of this empirical study, which firstly focused on the statistical scope of teacher migration in Southern Africa, its causes and impact on education systems, schools, teachers and their families. In addition, the study sought to investigate the main parameters and features of a strategy for managing teacher migration by both sending and receiving countries. These questions also sought to understand the experiences and perceptions of teachers, school principals, experts and policy makers on teacher migration. In investigating these questions, the specific focus of the study was made clear. The substance and sequencing of the questions reflected the focus of the investigations on teacher migration in Southern Africa.

4.2 RESEARCH DESIGN AND METHODOLOGY

This study employed a mixed-methods research design by combining the quantitative and qualitative approaches to analyse the teacher migration phenomenon in Southern Africa. Since combined methods present different ways of seeing the world, and since those viewpoints complement each other (Chilisa & Preece, 2005:184), their use in this study enabled the researcher to examine the different facets of teacher migration, including its scope, main causes and effects, and enhanced the validity and the integrity of the findings (Bryman, 2008:609). Furthermore, as Creswell (2003:16) reveals, the advantage of combining quantitative and qualitative methods is that the biases inherent in one method are overcome by the use of the other method. The mixed-methods approach was applied by combining the descriptive survey design (part of the quantitative paradigm) with qualitative interviewing and by using quantitative and qualitative data analysis techniques. In the next section the rationale for choosing the mixed-methods design is discussed.

4.2.1 Rationale for a mixed-methods design

This study applied the mixed-methods design, combining both the quantitative and qualitative approaches (see Section 1.6.1). As Chilisa and Preece (2005:187) assert, mixed methodology studies include aspects of quantitative and qualitative characteristics at several stages throughout the study. In addition, Gorard and Taylor (2004:4) posit that researchers should

move beyond the use of monolithic methods and assert that quantitative and qualitative approaches are more powerful when used in combination than in isolation, as they complement each other's strengths and compensate for each method's weaknesses. As Gorard and Taylor (2004:7) further contend, combined research often has greater impact because figures can be very persuasive to policy makers, whereas stories are more easily remembered and repeated by them for illustrative purposes. The authors also argue that combined approaches can be more useful when the background theory for an investigation is minimal, and where one of the main purposes of the study is to generate useable theory. As stated in Chapter 1, the main aim of this thesis was to develop a model for managing teacher migration in Southern Africa, and the mixed-methods design was, therefore, found to be suitable for this purpose. Teddlie and Tashakkori (in Gorard & Taylor, 2004:7) reach an important conclusion, that combining methods in one study can confirm and explain, verify and generate theory, all at the same time. Using combined approaches was thus considered appropriate for this study.

Gorard and Taylor (2004:42-43) contend that the most common way in which data derived from different sources are combined is triangulation, a process defined by Denscombe (2008:134) as the practice of viewing things from more than one perspective. This can mean the use of different methods, different sources of data or different researchers within the same study. Findings can thus be corroborated, questioned or complemented by the different methods. In that respect, the use of combined methods as triangulation increases the validity of the research and the trustworthiness of the data and its findings. In this study, triangulation was achieved by combining the quantitative and qualitative research approaches, the use of the survey questionnaire and in-depth interviewing as data collection instruments, different data sources (migrant teachers, school principals, migration experts, union leaders and policy makers) and quantitative and qualitative data analysis methods. The researcher believes that the combination of the above approaches and instruments enhanced the reliability and validity of the data and the credibility of the findings.

4.2.2 Comparing and contrasting quantitative and qualitative approaches

Fairbrother (2007:39) posits that among many perspectives to research, a broad classification distinguishes between the quantitative and qualitative approaches. Quantitative and qualitative approaches share certain similarities and vary in a number of significant ways.

Quantitative research methods refer to research techniques that are employed to obtain numerical data (Kannae, 2004:24) which can be quantified or expressed in the form of numbers and can range from simple counts such as the frequency of occurrences to more complex data such as test scores (Saunders, Lewis & Thornhill, 2009:414). On the other hand, qualitative research methods refer to the meanings, concepts, definitions, characteristics, metaphors, symbols and descriptions of people or things (Berg, 2009:3). Quantitative data thus refer to information about the world in numerical form, whereas qualitative data are essentially information about the world in the form of words (Punch, 2005:58).

The quantitative and qualitative approaches have certain philosophical and methodological differences. Johnson and Onwuegbuzie (in Jonson, 2008:2) argue that the quantitative purist looks at research more from a positivist perspective, where the research should parallel that of the physical sciences. In this kind of research, there is an assumption that there is only one truth and that that truth is independent of the researcher's perception. According to this school of thought, researchers should eliminate their biases, remain emotionally detached and uninvolved with the objects of the study and test their hypotheses. Since quantitative research is based on the scientific method, it is more highly formalised, explicitly controlled; typical examples of quantitative studies include social surveys, experiments with control groups and structured observations (Chilisa & Preece, 2005:183). On the other hand, qualitative research is based on the constructivist perspective, which asserts that social phenomena are accomplished by social actors and are in a constant state of revision.

Constructionism thus places emphasis on the emotions, motivations, symbols and the meanings individuals assign to their experience (Berg, 2009:16). In constructionism, the researcher uses interpretive methods such as observations and in-depth interviews. The researcher's main aim is to understand human phenomena 'through the eyes of the people being studied' (Bryman, 2008:385-393). The focus is thus on understanding people's interpretation of their own social reality in a given situation. This, therefore, implies that, in qualitative research, the natural setting and the perspective of those being studied is paramount, unlike in quantitative research where the setting may be controlled and the concerns of the researcher structure the investigation. Even then, it should be acknowledged that qualitative researchers make an interpretation of what they see, hear and understand, and that their interpretations cannot be separated from their own background, history, context and

prior understandings (Creswell, 2007:39), thus seeming to give credence to the view that qualitative research is subjective, while quantitative research is objective. To that end, Bryman (2008:22) argues that quantitative research embodies a view of social reality as an external objective reality, while qualitative research embodies a view of social reality as a constantly shifting and emergent property or phenomenon of individuals' creation. However, Wellington (2000:17) asserts that the subjective-objective divide between qualitative and quantitative approaches is often exaggerated, arguing that qualitative research is based on objective reality, while quantitative research is not always value-free.

Bryman (in Fairbrother, 2007:41-42) notes that establishing causality is one of the primary pre-occupations of quantitative research. Quantitative researchers seek explanations to 'why' questions by looking for causal factors and demonstrating relationships between variables. On the other hand, instead of looking for statistical relationships among carefully delineated and measured concepts, qualitative researchers provide rich, deep and detailed descriptions of the phenomenon as perceived by the participants. The qualitative approach is thus more holistic and naturalistic.

According to Fairbrother (2007:41) and Mayoux (2006:116), quantitative research has the purpose of generalising findings to larger populations and other research locations. This goal is achieved through the use of random representative samples, particularly in experimental and survey research. The replication of research findings is also considered important in quantitative research, as it strengthens the claim of generalisation. In contrast, qualitative research does not have generalisation to other contexts or populations as its aim. Instead, attention is given to events, processes and behaviours in the immediate context and the samples are selected using non-probability or judgemental techniques, discussed in detail in Section 4.3.

Another important distinction between quantitative and qualitative approaches is that the former entails a deductive approach to the relationship between theory and research, in which the emphasis is placed on the testing of theories or hypotheses, while the latter predominantly emphasises the inductive approach, focusing on the exploration or generation of theories (Bryman, 2008:22). This is corroborated by Fairbrother (2007:41) who contends that the quantitative approach is confirmatory, starting with a general theory and more specific hypotheses, the operationalisation of concepts as variables for the collection of data, and then

to statistical analysis of such data to check if the findings confirm or refute the theory or hypotheses. On the other hand, qualitative research is exploratory, seeking to discover, formulate and test grounded theory during the process of data collection and analysis.

Chilisa and Preece (2005:183) reveal that another contrasting feature between quantitative and qualitative approaches relates to the research instruments and questions. In quantitative research, the research questions are predefined and static, while in qualitative research they are flexible and may revolve during data collection. In quantitative research such as surveys and experiments the research instruments may include structured questionnaires or structured observation schedules, while in qualitative research, the researcher is a key instrument of data collection. In support of the view that in qualitative research the researcher is an instrument of data collection, Creswell (2007:38) explains that qualitative researchers collect data themselves through examining documents, observing behaviour and interviewing participants. Although the researchers may use an instrument such as an interview guide to collect data, they are the ones who actually gather the information.

The quantitative and qualitative approaches are not without criticism. Picciano (in Fairbrother, 2007:44) criticises quantitative research for silencing the voices and perspectives of the research subjects, excluding meaning and context, for generating superficial data which are inapplicable to individual cases and for focusing on theories which may be irrelevant to the research participants themselves. The same scholar criticises qualitative research for relying too much on the researcher's interpretations, producing findings which are not generalisable or replicable, generating soft data and even being an assault on truth.

The combination of the quantitative and qualitative approaches in this study was considered important, as it enabled the researcher to explore the development of a strategy or model for managing teacher migration in Southern Africa, based on the findings emerging from the qualitative data. The teacher migration model was also informed by existing migration theory and the results of the quantitative study. Although each of these methods has unique characteristics, strengths and weaknesses, both of them are concerned with the same fundamental goal of answering questions about social reality (Bryman, 2008:398). As Johnson (2008:3) further reveals, both the quantitative and qualitative approaches require the collection, analysis and reporting of data.

According to Chivore (2003:14), and as was already stated in Section 1.6.1, 98% of all educational research employs survey methods. This implies that the descriptive survey design is one of the most effective methods used in studying educational issues. Best (in Cohen, Manion & Morrison, 2000:169) argues that the descriptive survey design is concerned with conditions or relationships that exist, opinions that are held, processes that are going on and trends that are developing in social units. Data gathering techniques used in surveys include structured or semi-structured interviews, self-completion or structured questionnaires, standardised tests and attitude scales (Cohen, Manion & Morrison, 2000:169). The descriptive survey method is broad in scope and flexible and it can be a relatively cheap and a quick way of obtaining reliable and representative data (Chivore, 2003:14). Qualitative interviewing enables the researcher to conduct in-depth interviews which may reveal much more information than the standard questionnaire which is normally used in survey research (Bryman, 2008: 623).

In view of the above, the mixed-methods approach, combining the descriptive survey design with qualitative interviewing helped the researcher to discover, describe, analyse and interpret those conditions that related to teacher migration in Southern Africa, including its magnitude, nature, causes and effects. Furthermore, the combined approach enabled the researcher to use instruments of collecting data such as questionnaires and in-depth interviews to gather complementary data and to analyse such data both quantitatively and qualitatively.

4.3 POPULATION AND SAMPLING PROCEDURES

In this section the population and sampling procedures, including the relationship between a population and a sample, types of sampling and sample size, are discussed. The theoretical considerations which were taken into account in determining the research sample of this study are discussed below.

4.3.1 Contemplating the research population and the research sample

Bryman (2008:168) defines a population as the universe of units from which the sample is to be selected. This refers to a full set of cases or elements from which a sample is taken and the population may comprise objects, animals, people or other units. As Saunders, Lewis and

Thornhill (2009:210) argue, it is often not possible to conduct a census or to collect and analyse data from the entire population, owing to restrictions of time, money and access, hence the need to select a sample.

Chilisa and Preece (2005:100) explain that sampling involves the selection of a representative number of units from the population of the study. In quantitative research such as survey research, the main purpose of a sample is to study the sampled population and be able to generalise the findings to the population from which the sample was drawn. Sampling saves on time and costs because a limited number of units from the population of study are investigated. Sampling can also lead to greater accuracy compared to a census survey because close attention may be paid to the collection, analysis and interpretation of the data.

According to Saunders, Lewis and Thornhill (2009:210), sampling techniques may be divided into two types, probability or representative sampling and non-probability or judgemental sampling. With probability sampling, the chance of each case being selected from the population is equal. The process of probability sampling involves identifying a suitable sampling frame, deciding on a suitable sample size, selecting the most appropriate sampling technique and selecting the sample, and checking that the sample is representative of the population. The sampling frame is a complete list of all the cases in the population. For example, in the context of this study, the sampling frame was the database of all migrant teachers in each participating country (Botswana, South Africa and Zambia). Evidence from the literature study indicated that none of the countries participating in this study had a complete and accurate database of migrant teachers, thus making it difficult to create a sampling frame and apply probability sampling techniques (Ochs & Jackson, 2009:6).

As Saunders, Lewis and Thornhill (2009:217-218) further explain, deciding on a suitable sample size should take into account generalisation about the population from the data collected. This means that the sample should be representative of the population - the larger and heterogeneous the sample size, the lower the likely error in generalising the findings to the entire population. Cohen, Manion and Morrison (2000:96) also indicate that determining the sample size should also take into account attrition and respondent mortality, that is, that some participants will leave the research or fail to return questionnaires.

Saunders, Lewis and Thornhill (2009:218) indicate that the researcher's choice of sample size is governed by several factors, including the confidence level of the data, that is, the level of certainty that the characteristics of the data collected will represent the characteristics of the total population and the margin of error, meaning the level of accuracy required for any estimates made from the sample. Saunders, Lewis and Thornhill (2009:219) claim that researchers normally work to a 95% level of certainty. Table 4.1 shows sample sizes for different sizes of population.

Table 4.1 Sample size at 95% confidence level and margin of error

Population	Margin of error		
	5%	3%	2%
50	44	48	49
100	79	91	96
150	108	132	141
200	132	168	185
250	151	203	226
300	168	234	267
400	196	291	343
500	217	340	414
750	254	440	571
1 000	278	516	706
2 000	322	696	1091
5 000	357	879	1622
10 000	370	964	1936
100 000	383	1056	2345
1 000 000	384	1066	2395
10 000 000	384	1067	2400

Source: Saunders, Lewis and Thornhill (2009:219)

Saunders, Lewis and Thornhill (2009:222) reveal that probability sampling techniques include simple random, systematic, stratified random, cluster and multi-stage sampling. Simple random sampling involves selecting the sample at random from the sampling frame using random number tables, a computer or an online random number generator. The cases

are selected from the random numbers (each representing a case) until the sample size is reached. In systematic sampling, the sample is selected at regular intervals from the sampling frame, while in stratified random sampling, the population is divided into two or more subsets or strata based on specific attributes such as gender. A random sample is then drawn from each of the strata. Cluster sampling may appear similar to stratified random sampling, except that the sampling frame is the complete list of clusters rather than individual cases within the population. A sample of the population (clusters) is selected and data are collected from each individual case within the selected clusters. Cohen, Manion and Morrison (2000:101) indicate that multi-stage sampling is an extension of cluster sampling. It involves selecting the sample in stages, that is, taking samples from samples - a representative sample is selected randomly from sub-sub groups of relevant discrete sub-groups and groups.

Bryman (2008:183) identifies three main types of non-probability sampling, convenience sampling, quota sampling and snowball sampling, while in addition to these, Cohen, Manion and Morrison (2000:102-104), also include purposive sampling and dimensional sampling. A convenience sample is available to the researcher by virtue of its accessibility. It involves choosing the nearest or most accessible individuals, such as students in a class or participants in a meeting to serve as respondents. This explains why, according to Cohen, Manion and Morrison (2000:102), convenience sampling is also known as accidental or opportunity sampling. The main criticism of convenience sampling is that the sample does not represent any group apart from itself, thus making it difficult to generalise the wider population.

According to Bailey (in Cohen, Manion & Morrison, 2000:103), quota sampling may be viewed as the non-probability equivalent of stratified sampling in probability sampling. As Bryman (2008:185) further explains, like stratified sampling, the aim of quota sampling is to produce a sample that reflects a population in terms of the relative proportions of people in different categories such as gender, age and ethnicity (quotas), the only difference being that the cases are not randomly selected.

In purposive or judgemental sampling, the researcher picks the cases to be included in the research on the basis of typicality (Cohen, Manion and Morrison, 2000:103). As Saunders, Lewis and Thornhill (2009:237) explain, the researcher selects cases that will best enable him/her to answer the research questions and meet the objectives. Trochim and Donnelly (2008:49) identify two sub-categories of purposive sampling, modal instance sampling and

experts sampling, and explain that modal instance sampling involves sampling for the most typical case, while expert sampling involves selecting people with known experience and expertise in the area under investigation.

According to Bryman (2008:184), in snowball sampling, the researcher makes initial contact with a small group of people who are relevant to the research topic and uses these to establish contacts with others who qualify for inclusion and these in turn identify yet more participants until the required sample size is reached.

4.3.2 Research sample

In this study, and as was explained in Section 1.6.2, the target population comprised secondary school migrant teachers, school principals in secondary schools with migrant teachers, Ministry/Department of Education officials and leaders of teachers' unions in three Southern African countries, namely, Botswana, South Africa and Zambia. These countries were purposefully selected because of the previous study (Sinyolo, 2007:13) and literature, which revealed that they were all affected by teacher migration in various ways. Botswana and South Africa seem to be sending and receiving countries, while Zambia is predominantly a sending country (Castles & Miller, 2003:142-143; IOM, 2006:299-307). A combined sample of respondents and participants, comprising the following categories and sizes was drawn from the three countries: three Education Officers (one from each Ministry/Department of Education), 30 secondary school principals (10 from each country), 30 migrant teachers (10 from each country), three leaders of teachers' unions (one from each country), 11 migration experts, comprising four representatives of regional/international organisations (the Commonwealth Secretariat, International Organisation for Migration [IOM], the Southern African Migration Project [SAMP] and the Southern African Development Community [SADC]) and seven academics purposefully selected on the basis of their published works on skilled labour migration and/or teacher migration in the region. A total of 77 respondents and participants were approached for data collection. Of these, 63 respondents, comprising three Education Officers, 30 secondary school principals and 30 secondary school migrant teachers were approached to respond to the self-administered survey questionnaire. The 11 migration experts, the three Education Officers, the three representatives of teacher unions, 10 school principals and 10 migrant teachers were also approached to participate in the in-depth individual interviews, giving a total of 37 potential

interviewees. The number of interviewees was considered ample in order to dedicate sufficient time to each interview and delve deeper into the migration issues under investigation. The personal experiences of migrant teachers enabled the researcher to have an in-depth investigation and understanding of the teacher migration phenomenon in Southern Africa.

Purposeful sampling, based on secondary schools that had experienced teacher immigration and emigration, was used to identify the most appropriate sites (participating secondary schools) from which the respondents and participants were drawn (see Section 1.6.2). The migrant secondary school teachers participating in this research were identified using the snowballing sampling technique. Purposeful sampling was selected because it enabled the researcher to select the typical site for studying the phenomenon under investigation (teacher migration), while the snowball technique was selected because information on migrant teachers was not readily available.

4.4 DATA COLLECTION TECHNIQUES AND INSTRUMENTS

In this study, the main data gathering instruments used were questionnaires and individual in-depth interviews. Self-administered questionnaires were selected for this study because they are relatively easy to use and inexpensive in terms of the amount of money used for collecting the data, while interviews were chosen because they can yield in-depth information from the interviewee's perspective (Cooper, Donohue & Tharenou, 2007:102; see Section 1.6.3). The use of these complementary data gathering instruments ensured triangulation and improved validity and reliability, as it helped the researcher to cross-check the information obtained and to gain a deeper insight into the issues under investigation. When developing and administering the questionnaire, the researcher paid particular attention to the basic principles discussed below.

4.4.1 Questionnaire

The questionnaire is a common data gathering instrument used in social surveys. Hall and Hall (1996:98) define a questionnaire as any set of questions in a research study. This definition implies that an interview schedule would qualify as a questionnaire. However, the

definition used in this thesis was that proffered by Bryman and Bell (2011:231), who use the term 'self-completion questionnaire'. The authors explain that with a self-completion or self-administered questionnaire, the respondents answer questions by completing the questionnaire themselves, as opposed to the interview schedule where the questions are asked by the interviewer. Self-administered questionnaires are usually used in postal or web site surveys.

The self-administered questionnaire has several advantages compared to the interview. As Cohen, Manion and Morrison (2000:245) reveal, the questionnaire is a widely used and useful instrument for collecting survey information, providing structured, often numerical data, being able to be administered without the presence of the researcher and being comparatively straightforward to analyse. As Bryman and Bell (2011:232-233) confirm, the self-completion questionnaire is cheaper and quicker to administer, ensures the absence of interviewer effects and bias, and is convenient for the respondents. However, these advantages should be counterbalanced by the time taken to develop, pilot and refine the questionnaire, by the possible limited scope of the data collected and the likely limited flexibility of response (Cohen, Manion & Morrison, 2000:245). The self-administered questionnaire does not provide room for helping respondents if they have difficulty answering a question, there is no opportunity to probe respondents to elaborate an answer and may result in a higher risk of missing data and lower response rates (Bryman & Bell, 2011:234-235).

Certain fundamental principles should be adhered to when developing and administering a self-completion questionnaire in order to ensure the validity and reliability of the data collected. A valid questionnaire will enable accurate data to be collected and one that is reliable will mean that these data are collected consistently (Saunders, Lewis & Thornhill, 2009:371-372). With respect to the self-administered questionnaire used for this study (Appendices D - F), validity and reliability were ensured through the meticulous construction of the questions so that they are explicit and clearly understood by the respondents and through the consistent administration of the questionnaire. The questionnaires were also reviewed by two migration experts, pilot-tested and refined.

Cohen, Manion and Morrison (2000:247:) advise that a good questionnaire should be clear on its purpose, exhaustive in its coverage of the issues under investigation, ask the most

appropriate questions in order to elicit the right kind of information to answer the research question and ask for empirical data. Bryman (2008:221) advises that in order to improve the response rates, questionnaires should be made to appear as short as possible, should have clear instructions and an attractive layout. He further advises the researcher to write a good covering letter explaining the reasons for the research, why it is important and why the recipient has been selected. In addition to the above, Cohen, Manion and Morrison (2000:247-260) and Bryman (2008:220-224) seem to agree on one fundamental principle: highly structured questionnaires are useful in generating frequencies of response amenable to statistical treatment and analysis, but on the other hand, they do not enable respondents to add any remarks, qualifications and explanations to the categories provided (which might even not be exhaustive).

In view of the foregoing, in this study, the researcher used a variety of questionnaire items, including rating scales, close-ended and open ended questions, and these were developed within the framework of the research questions. Specific questionnaires were developed for different categories of respondents: migrant teachers, school principals, teacher union leaders, Education Officers and migration experts. In order to improve the response rate, each questionnaire was kept as brief as possible and was accompanied by a covering letter explaining the purpose of the research and assurances of confidentiality. The researcher engaged research assistants who helped distribute questionnaires and collect completed questionnaires from the respondents.

4.4.2 Interview

The research interview is a prominent data collection strategy in both quantitative and qualitative research, and the in-depth interview is probably the most widely employed method in qualitative research (Bryman, 2008:193,436). An interview is more than a conversation (Denscombe, 2007:173) because it is systematic and objective and involves the gathering of research-relevant information through direct verbal interaction between the interviewer and interviewee (Cohen, Manion Morrison, 2000:269). As Denscombe (2007:173) further explains, the interview involves a set of assumptions that are not normally associated with a casual conversation. These include consent for the interviewee to take part and to have his/her words treated as 'for the record' or not to be attributed to them.

Bryman (2008:193,437) distinguishes between a structured interview and an in-depth interview, with the former being mainly applied in quantitative research, while the latter is generally applied in qualitative research. The author further explains that a structured interview entails the administration of a standardised interview schedule by an interviewer, in such a way that all interviewees are given the same context of questioning. On the other hand, the in-depth interview is semi-structured or unstructured. Although both the structured and in-depth interview both involve the administration of an interview schedule, in the case of the latter the set of questions to be asked is less rigid and the interviewer can depart from the schedule in order to gain deeper insight into the issues under discussion.

The interview has several advantages over a questionnaire. As Bryman (2008:218-219) reveals, the interview ensures higher response rates, enables the interviewer to explain unclear or ambiguous questions, prompt and probe participants to elaborate an answer. The interview, therefore, provides rich detailed data and a deeper insight into the issues under investigation. One of the disadvantages of the interview, and the in-depth interview in particular, is the relatively lower level of reliability and validity of measurement of key concepts, as compared with the structured questionnaire. Interviews, the coding and processing of data collected through them may also be time-consuming.

The basic principles of interviewing require that the interview should be conducted based on an interview guide or schedule and with a reflective approach to the knowledge sought and the interpersonal relation of the interview situation (Cohen, Manion & Morrison, 2000:274). The designing of the interview schedule involves considering the conducted literature review which translates into the research objectives to make up the main body of the interview schedule.

In this study, the researcher used in-depth interviewing to complement the self-administered questionnaire. An interview schedule with open-ended questions, based on the problem statement and research questions was developed to guide the in-depth interviewing (Appendix G). In line with the suggestions of Bryman (2008:198), the researcher conducted the in-depth interviews using telephone and Skype as it was much cheaper and quicker compared to face-to-face interviewing (Bryman, 2008:198). This was more realistic in terms of cost-effectiveness, considering the expenses in terms of time and finances involved in travelling from the researcher's location in Europe to Southern Africa to conduct the face-to-

face interviews. All the interviews were recorded and transcribed from oral conversation to written text in preparation for analysis.

4.5 RELIABILITY AND VALIDITY

The concepts of validity and reliability are multi-faceted and can be applied to both quantitative and qualitative research. Cohen, Manion and Morrison (2000:105) argue that both validity and reliability are important to effective research, asserting that if a piece of research is not reliable or is invalid, then it is worthless.

4.5.1 Reliability

Reliability is fundamentally concerned with issues of consistency of measures and the degree to which the measure of a concept is stable (Bryman, 2008:698; Bryman & Bell, 2011:157). This definition is in line with that preferred by Cohen, Manion and Morrison (2000:117) who argue that reliability is essentially a synonym for consistency and replicability over time, measuring instruments and groups of respondents. Reliability is, therefore, consistency found in repeated measurements of the same phenomenon. For research to be reliable, it should thus demonstrate that if it were to be carried out on a similar group of respondents in a similar context, then similar results would be found. Precision and accuracy in measurement are essential in ensuring reliability.

There are three principal types of reliability: stability, equivalence and internal consistency (Cohen Manion & Morrison, 2000:117). Reliability as stability is a measure of consistency over time and over similar samples. This is usually measured through the test- retest method, which involves administering a test or measure on one occasion and then re-administering it to the same sample on another occasion (Bryman & Bell, 2011:157). Reliability as equivalence may be achieved using equivalent or alternative forms of a data gathering instrument. If an equivalent form of the research instrument yields the same results, then the instruments can be said to be reliable. Reliability as internal consistency is measured through the split-half method, which entails dividing test or questionnaire items into two halves and administering them separately to a group. If the results obtained from each half show a high degree of correlation, then the test or questionnaire may be said to have this type of reliability (Cohen Manion & Morrison, 2000:118).

The perspective of reliability given above basically comes from the quantitative research paradigm, as it is mainly concerned with measures and replicability. As Cohen, Manion and Morrison (2000:119) and Creswell (2007:209-211) reveal, in qualitative research, reliability often refers to the stability of responses to multiple coders of data sets and may be achieved by ensuring that there is a fit between what researchers record as data and what actually occurs in the natural setting. In this thesis, reliability was achieved by ensuring precision and accuracy in the construction of the questionnaire items, data collection and coding. The researcher compiled detailed notes during the in-depth interviews. All the interviews were recorded and transcribed afterwards and the notes compared with those taken during the interview itself. Both the questionnaire and interview schedule were pilot-tested to ensure the instruments' reliability and validity.

4.5.2 Validity

Viewed from a broader perspective, the concept of validity is used to judge whether the research accurately describes the phenomenon which it is intended to describe (Bush, 2002:65). Validity, therefore, refers to the issue of whether an instrument or indicator that is designed to gauge a concept actually measures that concept (Bryman, 2008:151 and Burns & Burns, 2008:509). Data are, therefore, valid when they provide accurate measurement of a concept (Gilbert, 2008:515). In quantitative research, data validity might be improved through careful sampling, appropriate measurement and statistical analysis of the data, while in qualitative research, data validity can be achieved through the honesty, depth, richness and scope of the data achieved. While the researcher should strive for the highest degree of validity, it should be noted that it is impossible for research to be 100% valid. Quantitative research possesses a measure of standard error, while in qualitative data, the subjectivity of the respondents, their opinions, attitudes and perspectives may contribute to a degree of bias (Cohen, Manion & Morrison, 2000:5; Daponte, 2008:136).

Cohen, Manion and Morrison (2000:105-111) and Bryman (2008:151-153) identify several types of validity. Both quantitative and qualitative methods can address internal and external validity. As Cohen, Manion and Morrison (2000:107-109) reveal, internal validity seeks to demonstrate that the explanation of a given phenomenon that a piece of research provides can actually be sustained by the data. This concerns accuracy which can be applied to quantitative and qualitative research and means the findings must accurately describe the phenomena

being investigated. On the other hand, external validity refers to the degree to which the research can be generalised to the wider population, cases or situations. However, it should be noted that in naturalistic research, generalisability may be interpreted as comparability and transferability of the findings, taking into account the context of the research. Researchers should thus provide sufficiently rich data for the readers and users of the data to determine whether transferability is possible.

Other important forms of validity include content validity, which can be achieved by ensuring that the measuring instrument reflects the content of the concept in question, construct validity by operationalising and articulating the constructs or concepts used in the study and convergent validity by comparing the results of different instruments used to measure the same concept. In this thesis, validity was achieved by ensuring that the self-administered questionnaire and the in-depth interview schedule actually measured the various facets of teacher migration in Southern Africa and that the elements in these instruments were addressed in considerable depth and breadth. The researcher applied commonly used migration terminology in these instruments and provided detailed instructions to the respondents. Furthermore, the researcher sought the opinion and feedback of the promoter and other experienced researchers before pilot-testing and administering the questionnaire and the interview.

4.6 DATA ANALYSIS

Based on the mixed-methods design, this study applied the quantitative and qualitative data analysis techniques. As already mentioned in Section 1.6.4 and as asserted by Denscombe (2008:248) quantitative research tends to be associated with numbers as the unit of analysis, whereas, qualitative research tends to be associated with words or images. He elaborates that in quantitative research, phenomena are measured so that they can be transformed into numbers. Once the phenomena have been quantified, they lend themselves to analysis through statistical procedures. On the other hand, qualitative research tends to be associated with the written word and to rely on intricate descriptions of people or phenomena.

Thorndike and Dinnel (in Oluwatoyin, 2006:136) state that the main purpose of collecting information is to describe the situation being studied. According to these scholars, this kind of description requires the application of descriptive statistics that will help the researcher to

concisely present the situation in question in a way that other people can easily understand. Trochim and Donnelly (2008:264) posit that descriptive statistics provide quantitative descriptions in a manageable form and help to summarise large amounts of data in a sensible way.

Chilisa and Preece (2005:130) state that inferential statistics are used to generalise observed traits from sample data to the population from which the population is a sub-group. These authors further argue that, to draw research conclusions that are generalised to the population, the sample should be randomly selected, be representative and large enough to enable generalisation to be made. Russo (in Oluwatoyin, 2006:137) maintains that descriptive statistics provide the basis for inferential statistics. Thus the application of inferential statistics in research depends on descriptive statistics. However, inferential statistics may not always be easily understood by the main participants and consumers of research findings, who, in this thesis, include migrant teachers, school principals, teacher union leaders and policy makers.

The qualitative data analysis method applied in this thesis was the phenomenological approach. According to Denscombe (2008:75-76), phenomenology is associated with humanistic research using qualitative methodologies that place special emphasis on the individual's views and personal experiences. This author further reveals that phenomenological research deals with people's perceptions or meanings, attitudes and beliefs, feelings and emotions. As Denscombe (2008:80) aptly concludes, the key characteristic of the phenomenological approach is its emphasis on providing an in-depth, detailed and authentic description of the experiences of the research participants. Concerning the steps involved in phenomenological analysis, Creswell (2007:159) advises researchers applying this method to record and describe the personal experiences of the participants, develop a list of significant statements and group these statements into themes. This author stresses the importance of describing what the participants in the study experienced and how the experience happened, including verbatim examples.

Following the strengths of the combined data analysis techniques discussed above, the results of the empirical study were presented and analysed both quantitatively and qualitatively. The results were presented quantitatively in terms of statistics expressed as percentages and frequency tables and qualitatively in terms of main categories and themes. Descriptive

statistics were used to analyse the data quantitatively, while the phenomenological method was used to analyse the data qualitatively. The use of descriptive statistics enabled the researcher to present the data using tables, frequency distributions, diagrams and other graphic devices that can be easily understood by policy makers, education managers, including school heads, and by other stakeholders in Southern Africa and beyond. The use of the phenomenological approach enabled the researcher to code data and to cluster it into themes, resulting in an in-depth description of the migration phenomenon, encapsulating the views and experiences of migrant teachers.

4.7 PRINCIPLES AND ETHICS WHICH GUIDED THE RESEARCH

Social scientists have an ethical obligation to their colleagues, their study population and the larger society and must thus ensure the rights, privacy and welfare of the people and communities that form the focus of their studies (Berg, 2009:60). Ethics may be perceived as the application of moral principles while interacting with others, in order to be respectful and fair and promote healthy relationships (Sikes, 2004:25). This implies that the researcher should be aware of the principles guiding ethical decisions and apply them. These principles are summarised by Trochim and Donnelly (2008:24) as follows:

- Voluntary participation, requiring that people not be coerced into participating in the research;
- Informed consent, meaning prospective research participants should be fully informed about the procedures and risks of participating in the study and give their consent;
- Confidentiality, a standard applied to protect the privacy of research participants; and,
- Anonymity, meaning the participant has the right to remain anonymous throughout the study, even to the researcher.

As stated in Section 1.6.6, in this study, permission was obtained from each country's Permanent Secretary for Education/ Director for the Department of Education to collect data from the Education Officers and schools (see Appendix A). Permission was also sought from

the participating school principals, teacher union officials and migration experts (see Appendix B and C). The anonymity of individual institutions and respondents was protected and the confidentiality of their identities ensured (see Appendix C). To achieve the above, the completed questionnaires and recorded interviews were assigned identifying numbers so that they do not refer to individuals and their institutions by name. Where essential anecdotal evidence, life stories or verbatim excerpts were included in the research, in line with the advice given by Hall and Hall (1996:185), pseudonyms were used to refer to the participants (see Section 6.2).

4.8 CONCLUSION

In this chapter, the methodological approaches and issues involved in conducting this empirical study were discussed, as well as the research design used and the rationale for using a mixed-methods approach. The population, sampling procedures, data collection techniques, instruments and methods of analysis were described and justification for their use given. The principles and ethics which guided the research were also presented. The chapter has presented a critique of methodological assumptions underlying the study, bringing out issues of the researcher's stance in this study's reliability and validity aspects. This empirical study enabled the researcher to understand the complexity surrounding teacher migration in Southern Africa. The data gathered from the migrant teachers, school principals, leaders of teacher unions and policy makers in Botswana, South Africa and Zambia and migration experts, using the self-administered questionnaire and interviews, was enormous and valuable. Significant issues were brought out by the respondents and participants and these are discussed in the subsequent chapters.

CHAPTER 5

ANALYSIS AND INTERPRETATION OF QUANTITATIVE DATA

5.1 INTRODUCTION

Chapter 4 presented the research methodology and the rationale for the choice of a mixed-methods research approach. In that regard, the rationale for choosing both quantitative and qualitative data collection and data analysis techniques, as well as the ethics that guided the research, were explained. Chapters 5 and 6 present the research findings based on the data collected for the empirical investigation and which were analysed and interpreted as final answers to the study's postulated research questions. The overall aim of the study was to investigate a strategy for managing teacher migration in Southern Africa. The specific aim of the study was to assess the statistical scope of international teacher migration in Southern Africa, its main causes and impact, as well as the main principles and guidelines that can be formulated to manage teacher migration viably. International teacher migration refers to the cross-border movement of teachers to establish themselves temporarily or permanently in another country and comprises emigration or outward teacher migration, and immigration or inward teacher migration (IOM, 2008:495). This study focused on both outward and inward teacher migration at secondary school level in Southern Africa (Botswana, South Africa and Zambia).

The aim of the research was guided by the following research questions (see Sections 1.4 and 4.1):

- What is the statistical scope of teacher migration in Southern Africa, in terms of countries, gender, age group, skill level and subjects most affected?
- What are the main causes of teacher migration?
- What are the main effects of teacher migration?
- What are the main principles and guidelines that can be formulated to manage teacher migration?

- What are the parameters and essential features of a viable strategy for managing teacher migration?

The results of the study are presented in four main themes, guided by the research questions above. Evidence was drawn from the views of migration experts, Ministry of Education officials, teacher union leaders, school principals and migrant teachers (see Sections 1.6.2 and 4.3.2). The views and experiences of the various categories of respondents and participants are analysed and compared, thus enabling the researcher to triangulate the data. Capturing and comparing the views of academics, policy makers, advocates and practitioners led to the improvement of the validity, reliability and credibility of this research.

Chapter 5 comprises a presentation of the research findings from quantitative data collected through a self-administered questionnaire.

5.2 RESPONSE RATE AND CHALLENGES ENCOUNTERED

In this study on the management of teacher migration in Southern Africa, a combined sample of respondents and participants, comprising the following categories and sizes, drawn from Botswana, South Africa and Zambia, was purposefully approached for data collection: three Education Officers (one from each Ministry/Department of Education), 30 school principals (10 from each country), 30 migrant teachers (10 from each country), three leaders of teachers' unions (one from each country), and 11 migration experts, who comprised four representatives of regional/international organisations, namely, the Commonwealth Secretariat, the International Organisation for Migration (IOM), the Southern African Migration Project (SAMP) and the Southern African Development Community (SADC) and seven academics purposefully selected on the basis of their published works on the migration of skilled labour force and/or teacher migration in the region (see Sections 1.6.2 and 4.3.2). This implies that a total of 77 respondents and participants were approached for data collection. Of this total of 77 potential respondents and participants, 63 respondents, comprising three Education Officers, 30 school principals and 30 migrant teachers were approached to respond to the self-administered survey questionnaire. Apart from completing the self-administered questionnaire, the three Education Officers, 10 school principals and 10 migrant teachers, as well as the 11 migration experts and the three representatives of teacher unions, were also approached to participate in the in-depth individual interviews, which

resulted in a total of 37 potential individual interviews to be conducted. The migrant teachers who participated in the study were selected using the snowball sampling technique. However, of the anticipated total of 77 participation possibilities, a total of 65 respondents and participants actually participated in the study, giving an overall response rate of 84.4%. The response rate for each category of participation was as follows:

- Education Officials: 2 (66.7%)
- School principals: 19 (63.3%)
- Migrant teachers: 30 (100%)
- Leaders of teachers' unions: 3 (100%)
- Migration experts: 11 (100%)

With regard to the individual interviewing, thirty-one (31) out of the total of thirty-seven (37) potential participants who were approached for participation, actually took part in the individual interviewing. These 31 participants comprised the following categories of representation: school principals (7), migrant teachers (10), teacher union leaders (3) and migration experts (11). Participation in the in-depth individual interviewing thus amounted to a response rate of 83.8%.

As the above figures illustrate, the number of participants was lowest among school principals. Apparent suspicion and fear, particularly among school principals and migrant teachers led to refusal to participate in the study. A number of respondents and participants who were approached declined to participate in the study, citing the sensitivity of the issue, personal reasons and lack of time to complete the questionnaire or participate in the interview as reasons why they could not take part. Some of the school principals were uncomfortable with the information going outside the country and did not respond until the third or fourth attempt. Encouragement and assurance that the information they provided was confidential and anonymous helped to solicit responses from some of them. The number of participants was lowest in Botswana where the researcher did not have an active local research assistant to travel around schools distributing and collecting questionnaires.

In addition to the challenges related to the response rate, the researcher's car was broken into. Some valuable property and his first interview notes were stolen before they were transcribed

and stored on a computer. It was further assumed that the participants would have access to the computer and Internet in order to respond to the questionnaires and interview schedule. However, most of the participants did not have access to a computer and the Internet, thereby making it difficult to complete the questionnaires online and for the researcher to conduct interviews by Skype. To circumvent these challenges, the researcher relied on telephone interviews and engaged research assistants who helped dispatch and collect the questionnaires from the respondents. In addition, shipping the questionnaires from Southern Africa to Belgium, where the researcher is based, was costly and took longer than originally expected, resulting in delays to receive and analyse data.

This research on the teacher migration phenomenon in the Southern African region entailed migrant teachers in secondary schools.

5.3 THE QUESTIONNAIRE

Three (3) different self-administered questionnaires were used to collect quantitative data from the Ministry of Education officials (see appendix D), the school principals (see appendix E) and the migrant teachers (see appendix F). Validity and reliability of these self-administered questionnaires were ensured through meticulous construction of the questions so that they were explicit and clearly understood by the respondents, and through the consistent administration of the questionnaire. The questionnaires were also reviewed by two migration experts, pilot-tested and accordingly refined for improved clarity (see Sections 1.6.3, 1.6.5 and 4.5.1).

Each self-administered questionnaire had three (3) sections (A, B and C). The questions in each section were carefully constructed in order to solicit data which would be used to answer the research questions (see Section 1.4). In the Ministry/Department of Education officials self-administered questionnaire and the school principals self-administered questionnaire, Section A solicited data on the number of teachers who had immigrated into, and emigrated from the country, disaggregated by gender, subjects taught and main source and destination countries. In the case of the self-administered migrant teachers' questionnaire, Section A solicited data on each migrant teacher's age, gender, highest professional qualifications, years of teaching experience before and after migrating and the

subjects taught by each migrant teacher. The data collected from Section A of all the three self-administered questionnaires helped the researcher to respond to the first research question on the statistical scope of teacher migration in Southern Africa (see Section 1.4).

Section B of the self-administered questionnaires for the Ministry of Education officials, the school principals and migrant teachers solicited data on the causes of teacher migration in sending and receiving countries (push and pull factors), thus helping the researcher to respond to the second research question on the main causes of teacher migration. Questions in Section C sought data on both the positive and negative effects of teacher migration on quality education, and on individual migrant teachers in their destination countries. In addition, Section C elicited the respondents' views on how to manage teacher migration in Southern Africa. Responses to questions in Section C helped to answer the third, fourth and fifth research questions on the main effects of teacher migration; the parameters and essential features of the main principles and guidelines that can be formulated to manage teacher migration; and a viable strategy for managing teacher migration(see Section 1.4).

The data collected with the self-administered questionnaires was analysed and interpreted as frequencies and percentages to determine trends with regard to teacher migration in Southern Africa. Tables, graphs and charts were used to illustrate the data visually in order to make it easier for the target users (policy makers, school principals, migrant teachers, teacher unions, international organisations and other key stakeholders) to easily understand the research findings. The next section presents the research findings on the statistical scope of teacher migration in Southern Africa.

5.4. STATISTICAL SCOPE OF TEACHER MIGRATION IN SOUTHERN AFRICA

The first research question focused on the statistical scope of teacher migration in Southern Africa in terms of countries, gender, age group, skill level and subjects most affected. As noted by previous teacher migration researchers (Ochs & Jackson, 2009:6; Legrain, 2007:53), there is a serious lack of teacher migration data at country level. In that regard, the researcher managed to get national data from Botswana only covering the number of migrant teachers in Botswana. Owing to a lack of national data in South Africa, the researcher was referred to the Department of Education in Limpopo Province, ostensibly one of the provinces with the highest number of migrant teachers in the country owing to its proximity to Zimbabwe, a

major sending country in the region. The researcher did not get the same sufficient teacher migration data from Zambia as he got from Botswana and South Africa. The representative of the Zambian Ministry of Education and the Zambian teachers' union reported that the data management system was not as complete as it should have been owing to the fact that it was not mandatory for schools to provide teacher migration data. Despite the inadequacy of teacher migration data in the Zambian Ministry of Education's data base, the Zambian schools which participated in the study, private schools in particular, had a number of migrant teachers. Some of the schools had also lost teachers to other countries, thus necessitating the inclusion of Zambia in this study. Although the inadequacy of the teacher migration data made it difficult to present a complete picture of the magnitude of teacher migration in the three countries participating in this study (Botswana, South Africa and Zambia), the available data provided insight into the statistical scope of teacher migration in the region, with the possibility of determining trends with regard to teacher migration in Southern Africa. In Sections 5.4.1 and 5.4.2, the data on the number of migrant teachers in Southern Africa are analysed and interpreted and their work related profiles in terms of skills, gender and age are discussed.

5.4.1 Number of migrant teachers

With reference to the Ministry of Education questionnaire that consisted of sections A, B and C (see Appendix D), the participants did not respond to all the questions in the different sections, citing lack of data as the reason. For example, none provided data on the number of secondary school teachers who had emigrated. This emphasises the importance of capturing detailed data on teacher migration tendencies in order to improve the management of teacher migration. Nevertheless, it was possible to obtain valid data especially on migrant teacher tendencies in Botswana and the Limpopo Province of South Africa.

According to the data provided by the Botswana respondent from the Ministry of Education and Skills Development, Botswana had a total of 336 migrant teachers, constituting 2.6% of the secondary school teaching force of 13 169 for the 2011 school year. Table 5.1 shows the age and gender composition of migrant teachers in Botswana, based on 2011 data.

Table 5.1 Migrant teachers in Botswana according to gender and age - 2011

Age group	Male	Female	Total
20-30	0	0	0
31-40	37	19	56
41-50	96	45	141
51-60	84	36	120
61-65	17	1	18
66 and more	0	1	1
Total	234	102	336

As shown in Table 5.1, the majority (69.6%) of migrant teachers in Botswana for the 2011 school year were male, with women constituting less than one-third of the total number of migrant teachers (30.4%). The significant male domination may be linked to the position of females in developing countries, particularly their perceived traditional role in the family, thus forcing them to remain behind looking after the children and family assets when the male spouse migrates. The majority of migrant teachers fell within the 41-50 (42.0%) and 51-60 (35.7%) age groups, thus suggesting that these teachers were highly experienced. According to the Botswana respondent from the Ministry of Education and Skills Development, most of the migrant teachers in Botswana came from India, Zimbabwe and Zambia. However, no figures were available to establish the actual percentages of migrant teachers coming from each of these countries. The source countries for Botswana migrant teachers were confirmed through an analysis of the source countries of the ten (10) migrant teachers from Botswana who participated in the study. The migrant teachers came from Zimbabwe (6), Kenya (2), Uganda (1) and Swaziland (1).

Although it was not possible to establish the number of secondary school teachers who had left Botswana for other countries, the Botswana Ministry of Education and Skills Development respondent acknowledged that teacher attrition was fairly significant. According to the data obtained from the Botswana Ministry of Education and Skills Development, the subjects mostly affected by teacher loss in Botswana for the year 2008 were mathematics (15.3%), English (9.0%), Setswana (5.4%), physics (5.0%), home management (4.4%), chemistry (4.0%), music (3.3%) and physical education (3.3%). It was

not possible to establish what proportion of the rate of attrition was attributed to international teacher migration because the data provided by the Botswana Ministry of Education and Skills Development had not been desegregated. However, the respondent from the Botswana Ministry of Education and Skills Development revealed that the Government of Botswana was contemplating ‘exporting’ teachers to Namibia in the near future.

The above statistics on teacher migration in Botswana indicated that, in addition to mathematics and science subjects, languages and the arts are also affected by teacher loss, thus partly explaining why a significant number of the migrant teachers who participated in the study taught languages and humanities (see Figure 5.7). If the rate of teacher attrition continues, this could create a demand for migrant teachers in Botswana. While it may be possible to replace the mathematics and science teachers who are leaving as a result of emigration (or other reasons) with migrant teachers, it may not be easy to find foreign teachers who can teach local languages like Setswana, thus posing a serious teacher supply challenge to the country. Several policy responses, such as teacher retention, training more teachers locally and continued recruitment of migrant teachers may help address the demand for secondary school teachers in Botswana.

In South Africa, the data obtained from the Department of Education in Limpopo Province showed a general decline in the number of migrant teachers from 2010 to 2012, as illustrated in Table 5.2.

Table 5.2 Migrant teachers in Limpopo Province of South Africa according to gender – 2010 to 2012

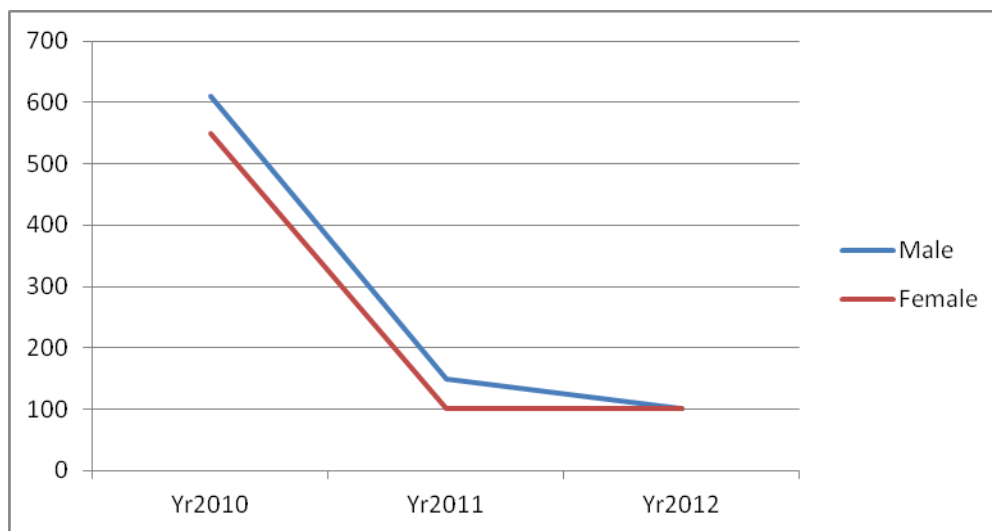
Year	Male	Female	Total
2010	610 (53%)	550 (47%)	1160(100%)
2011	150 (60%)	100 (40%)	250(100%)
2012	102 (50%)	102 (50%)	204(100%)

As shown in Table 5.2, the number of migrant teachers teaching in Limpopo secondary schools was 1 160 in 2010, 250 in 2011 and 204 in 2012. The proportion of male migrant teachers compared to female migrant teachers was higher in 2010 and 2011, comprising 53% and 60% of the total migrant teacher population, respectively. In 2012, the composition of the

migrant teacher population reflected a gender balance, with the proportion of female migrant teachers rising to 50%. This possibly related to the extent of encountered negative conditions in the source country which necessitated teacher migration to also include increased female participation. As is evident from statistics obtained from the South African Department of Basic Education (2012:16) and which was confirmed by the Department of Education in Limpopo, in 2010 migrant teachers constituted 4.6% of the secondary school teaching force of 24 980 in Limpopo Province. The significant proportion of migrant teachers in Limpopo Province for the year 2010 may be attributed to the province’s proximity to Zimbabwe, a major supplier of migrant teachers (see Table 5.3) who experienced major political turmoil and an economic crisis immediately before that period (see Chapter 3).

Between 2010 and 2012, the number of migrant teachers in Limpopo Province declined by a significant margin of 82.4%, a fall visually illustrated in Figure 5.1.

Figure 5.1 Three-year migration trends in Limpopo Province – 2010 to 2012



As illustrated in Figure 5.1, there was a dramatic decline in the number of migrant teachers in Limpopo Province between 2010 and 2011. The decline was possibly due to the political and economic situation that started to stabilise in Zimbabwe and the availability of fairly sufficient qualified teachers locally. According to the respondent from the Department of Education in Limpopo, most of the migrant teachers teaching in the province’s secondary schools came from Zimbabwe, Nigeria and Ghana. This is confirmed by the data provided by the nine (9) school principals from Limpopo Province who participated in the study, showing that the migrant teachers in their schools came from Zimbabwe, Zambia, Nigeria, Uganda

and the United Kingdom. Zimbabwe was cited as a major source country by both the Department of Education and the school principals. Coincidentally, all the ten migrant teachers who participated in the survey and in-depth individual interviews were from Zimbabwe; Zimbabwe is a major source country owing to its past political turmoil and economic crisis. In addition to source country conditions motivating outward teacher migration which results in significant migrant teacher supply, the nature of the snowball sampling technique used in this study also contributed to the over-representation of Zimbabwean migrant teachers.

Although it was not possible to obtain data on the total number of migrant teachers in South Africa from the South African National Department of Education, it was pointed out by the participant from the South African Department of Education that, according to information from the South African Qualifications Authority (SAQA), 2 863 migrant teachers, 59% of them male, had applied for the accreditation of their qualifications in 2010. Since all the migrant teachers need to have their qualifications accredited by SAQA before they can officially teach in the country, this number may be used as a reliable proxy indicator of the number of migrant teachers in South Africa. The participant further revealed that 67% of the applicants were Zimbabwean, confirming the fact that the majority of migrant teachers in South Africa were from Zimbabwe. This is also reflected in the number of migrant teachers who participated in this study (see Table 5.3).

5.4.2 Profile of the migrant teachers who participated in the study

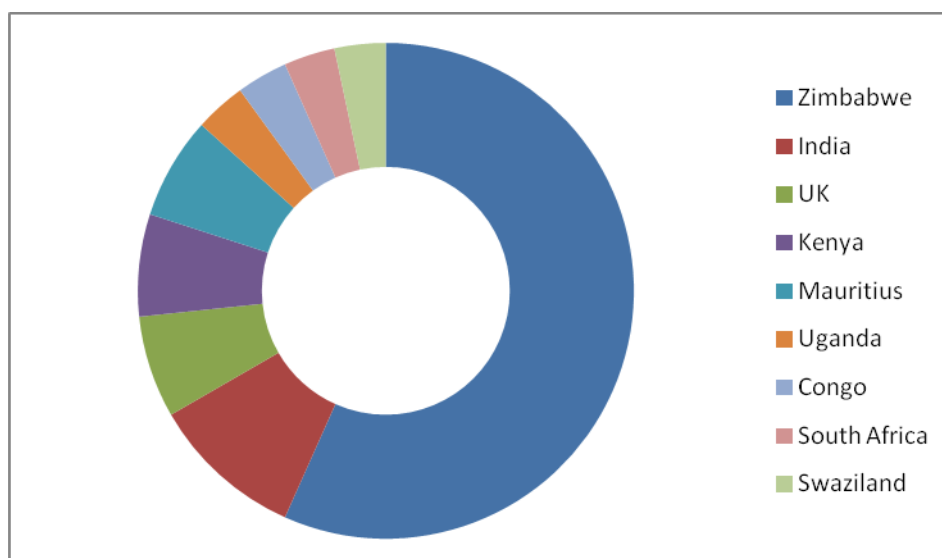
With reference to the migrant teachers' questionnaire in terms of sections A, B and C, with Section A soliciting demographic information (see appendix F), data obtained from the thirty (30) migrant teachers who participated in the study showed that they came from nine (9) countries, the vast majority of them (77.8%), African. These were Zimbabwe (17), India (3), United Kingdom (2), Kenya (2), Mauritius (2), Uganda (1), Congo (1), South Africa (1) and Swaziland (1). India and the United Kingdom were the only source countries outside Africa. Table 5.3 shows the number of migrant teachers per source country for the year 2012.

Table 5.3 Major source countries for teacher migration – 2012

Major source countries	Number of migrant teachers
Zimbabwe	17 (56.7%)
India	3 (10.0%)
United Kingdom	2 (6.7%)
Kenya	2 (6.7%)
Mauritius	2 (6.7%)
Uganda	1 (3.3%)
Congo	1 (3.3%)
South Africa	1 (3.3%)
Swaziland	1 (3.3%)
Total	30 (100%)

Percentage-wise and as shown in Table 5.3, the vast majority (56.7%) of the migrant teachers who participated in this study came from Zimbabwe, followed by India (10.0%), the United Kingdom, Kenya and Mauritius (2.0% each) and the rest of the countries (3.3% each). Figure 5.2 depicts a schematic representation of the migrant teachers' countries of origin.

Figure 5.2 Schematic representation of migrant teachers' countries of origin - 2012

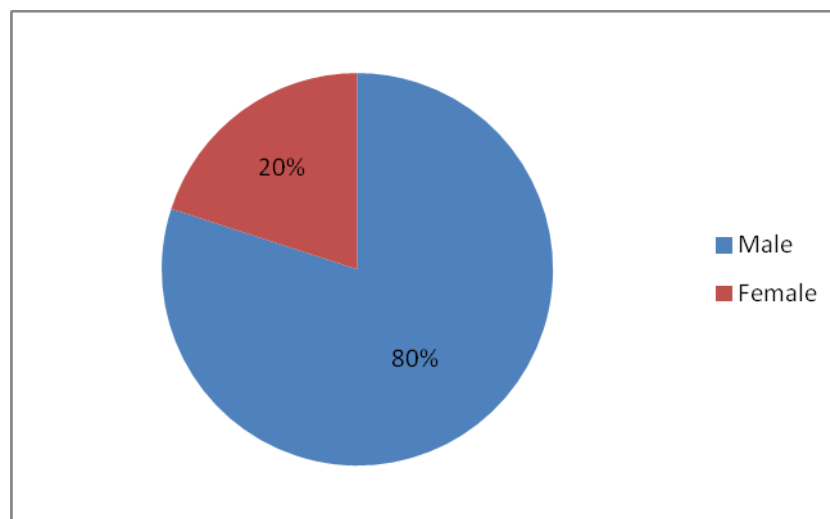


Zimbabwe's position as a major sending country, as illustrated in Table 5.3 and Figure 5.2 confirms the data provided by the Ministry of Education and Skills Development in Botswana and the Department of Education in South Africa's Limpopo Province, identifying Zimbabwe as one of the major sending countries, followed by India as a second major

sending country. Zimbabwe, with its political instability and economic crisis was the most significant supplier of foreign educators to the Limpopo Province of South Africa, also owing to its proximity to the province and for the fact that Musina, as the border town in Limpopo Province, is the inland port of entry from Zimbabwe to South Africa. Therefore, any meaningful teacher migration strategy must, as a matter of necessity, involve Zimbabwe as a major sending country and the major receiving countries such as South Africa and Botswana, as well as other members of the Southern African Development Community (SADC), to ensure better coordination and effective implementation.

The gender composition of the migrant teachers who participated in the study reflected a significant imbalance, as shown in Figure 5.3.

Figure 5.3 Gender composition of migrant teachers who participated in the study - 2012



As illustrated in Table 5.3, the vast majority (80.0%) of the participants were male, with females constituting one-fifth of the participants. Based on 2011 data, the proportion of male teachers who participated in the study exceeded the overall proportion of male migrant teachers in Botswana (69.6%) and Limpopo Province of South Africa (60.0%), thus suggesting that the snowball sampling technique used in the empirical study was somehow skewed in favour of male teachers. However skewed, male migration is more dominant than female migration, globally and especially in Africa, which is possibly due to the traditional role of women in African society as guardians of the home and caretakers. The less significant proportion of female migration may also be attributed to the potential risks and

dangers involved during the process of migration, including human trafficking and sexual abuse, which are likely to affect women more than men.

The age composition of the migrant teachers who participated in the study reveals interesting patterns, as shown in Figure 5.4.

Figure 5.4 Ages of migrant teachers – 2012

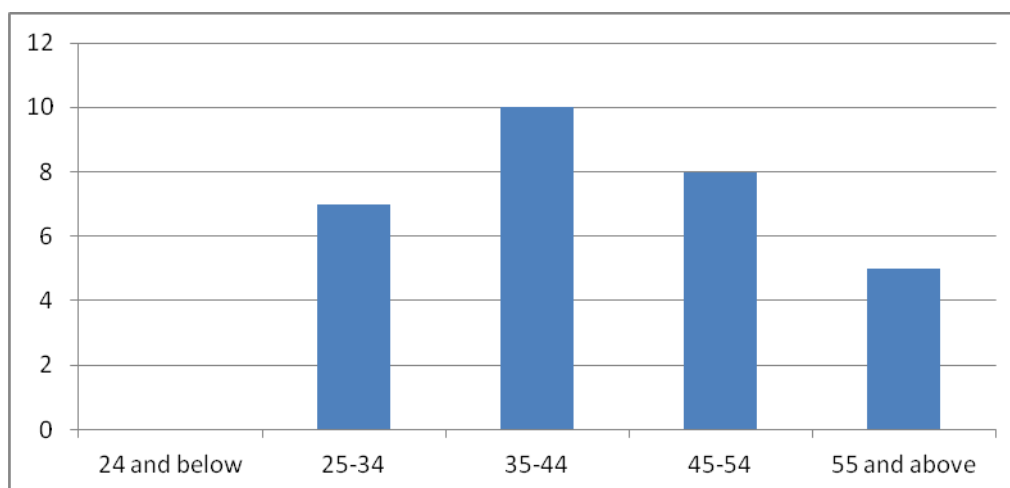


Figure 5.4 shows that the majority of the 30 migrant teachers participating in the study were aged 35-44 (33%), followed by those in the age range, 45-54 (27%), 25-34 (23%) and 55 and above (17%). None of the migrant teachers was aged 24 or below. A further analysis of the ages of migrant teachers who participated in the study revealed a nuanced variation between source countries, as shown in Table 5.4.

Table 5.4 Ages of teachers from different source countries – 2012

Age range	ZW	IN	MU	UK	KE	CG	ZA	SZ	UG	Total
25-34	7	0	0	0	0	0	0	0	0	7
35-44	9	0	0	0	0	0	0	0	1	10
45-54	1	0	1	1	2	1	1	1	0	8
55 & above	0	3	1	1	0	0	0	0	0	5
Total	17	3	2	2	2	1	1	1	1	30

Key: ZW Zimbabwe; IN India; MU Mauritius; UK United Kingdom; KE Kenya; CG Congo; ZA South Africa; SZ Swaziland; UG Uganda

An analysis of the data revealed in Table 5.4 shows that 41 % of the seventeen (17) migrant teachers from Zimbabwe fell within the age range 25-34, 53% within the 35-44 age range, while 6% fell within the 45-54 age range. By comparison, all the three migrant teachers from India (the country with the second highest number of migrant teachers participating in the study) were aged 55 or above, while all the other migrant teachers, except one (from Uganda), were aged 45 or above. The above data indicates that Zimbabwean migrant teachers were relatively younger than migrant teachers from other countries. In fact, all the migrant teachers in the 25-34 age-group were from Zimbabwe. The large proportion of relatively younger Zimbabwean migrant teachers compared to Indian migrant teachers may be due to several factors, including the ‘forced’ nature of migration from Zimbabwe, compared to ‘choice’ or optional migration from India based on environmental conditions prevailing in the two different source countries. Close proximity between South Africa and Zimbabwe, coupled with cheaper and easier means of travel, which include road transport, may also explain the reason why newly-qualified and younger Zimbabwean teachers can afford to migrate to South Africa much more easily, compared to their Indian counterparts, who may need to make savings over a longer period of time to afford an air ticket to South Africa.

Figure 5.5 shows the highest professional qualifications of the 30 migrant teachers who participated in the study for year 2012.

Figure 5.5 Highest professional qualifications of migrant teachers – 2012

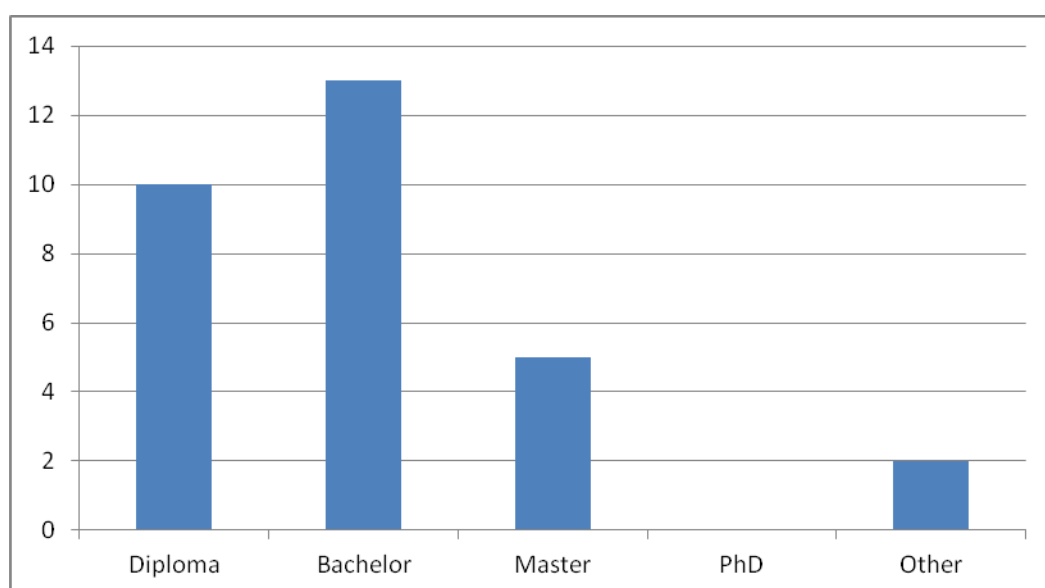


Table 5.5 shows that the majority of the migrant teachers (43%) who participated in the study had a Bachelor’s degree in Education, or equivalent, as their highest professional qualification, followed by a diploma or non-degree equivalent (33%) and a Master’s degree, or equivalent, (17%) and other qualifications (7%). None of the participants had a PhD. or equivalent. Bachelor’s and master’s degree holders constituted 60% of the participants, thus indicating that the majority of the migrant teachers who participated in the study were highly qualified. This may be due to that fact that a better skilled workforce is more mobile, thus contributing to losses and gains for sending and receiving countries.

Notably, the majority of the migrant teachers who participated in the study did not have many years of teaching experience, as shown in Figure 5.6.

Figure 5.6 Migrant teachers’ years of teaching experience before departure – 2012

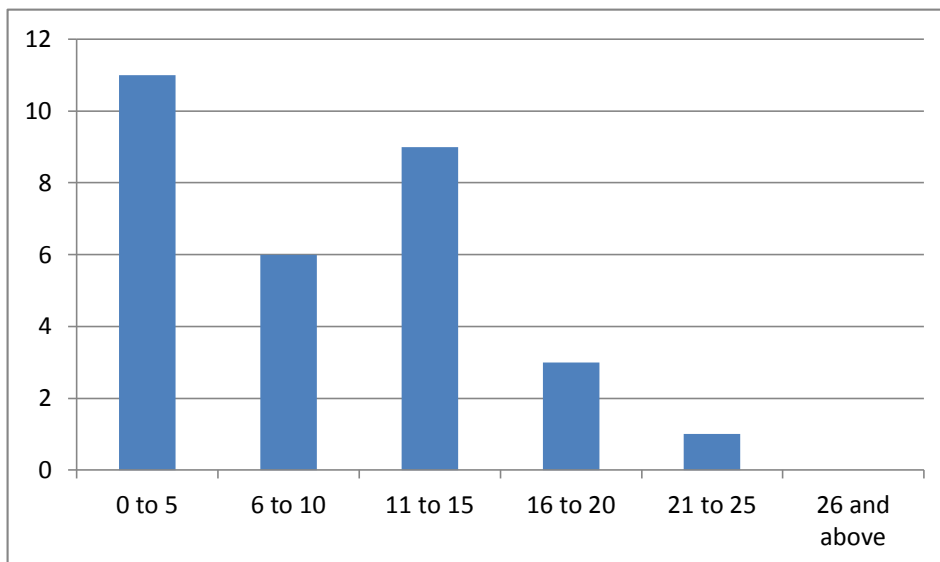
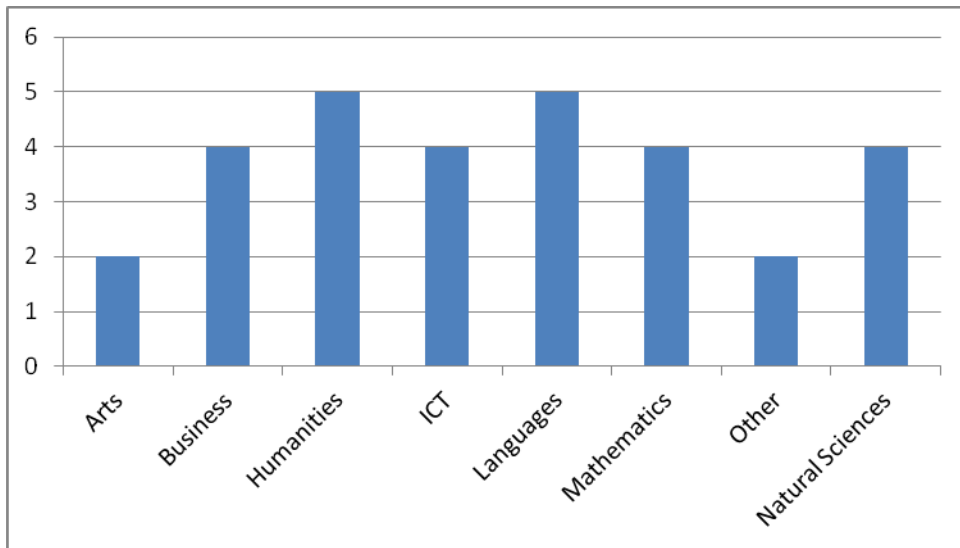


Table 5.5 shows that the majority of the migrant teacher respondents and participants (37%) had 0 to 5 years of teaching experience before emigrating, followed by those with 11 to 15 (30%) years of teaching experience, 6 to 10 years (20%), 16 to 20 years (10%) and finally, 21 to 25 years (3%) of teaching experience. None of the participants had 26 or more years of teaching experience. The above data seems to dispel the common notion that the majority of teachers who migrate are those with many years of teaching experience. Although well-qualified, the majority of the migrant teachers participating in the study did not have many years of teaching experience, thus bringing less pedagogical expertise which is based on years of teaching experience to the receiving countries. There were fewer migrant teachers

with 16 or more years of teaching experience (13%), possibly, owing to the difficulty to migrate as one gets older, as a result of emotional attachment to one's job, family and assets and the challenge of getting a job abroad when one is nearing retirement age. Employers usually prefer to invest in employees who are likely to stay longer with them and contribute to productivity (improvement of teaching and learning) over a longer period of time. A comparative analysis of the migrant teachers' years of teaching experience before emigrating, by source country, reveals notable variations. More than half (53%) of the seventeen (17) migrant teachers from Zimbabwe had between zero (0) and five (5) years of teaching experience before they emigrated; 24% had 6-10 years of teaching experience and 17% had 11-15 years of experience while 6% had 16-20 years of teaching experience. By comparison, all the migrant teachers from India had 11-15 years of teaching experience before leaving the country and the two migrant teachers from the United Kingdom had 6-10 and 11-15 years of teaching experience, respectively. In view of the above data, one would conclude that Zimbabwean teachers tend to migrate within the first five years of graduating from college, thereby denying the country, which would have invested in their training, appropriate returns. This further implies that Zimbabwe is a training ground for other countries in the region. The main reasons for migration are discussed in Section 5.5 and Chapter 6, as was especially determined with individual interviewing.

In examining the statistical scope of teacher migration in Southern Africa, and with reference to Section A of the survey questionnaire for migrant teacher respondents, the migrant teachers were asked to indicate the subjects they were teaching in their current schools (see Appendix F). The results are shown in Figure 5.7.

Figure 5.7 Subjects taught by migrant teachers – 2012



From Table 5.7 and in order of subjects taught, it is clear that the majority of the migrant teachers who participated in this study taught humanities (17%), languages (17%), followed by business studies (13%), information and communication technology (ICT) (13%), mathematics (13%), sciences (13%), the arts (7%) and other subjects (7%). The above data show that it is not only mathematics and science teachers who are migrating, but business studies, humanities and language teachers are also migrating. However, the proportion of teachers who teach business studies, information and communication technology, mathematics and natural sciences was relatively high among the migrant teachers participating in the research, thus demonstrating the need to pay special attention to these scarce skills areas in a viable teacher migration strategy attempt.

5.5 CAUSES OF TEACHER MIGRATION

Section 5.5 reports on an analysis of the survey questionnaire results of the causes of teacher migration that were collected from the school principals and migrant teacher participants, thus reflecting their perspectives. In Question 6 of the survey questionnaire (see Appendix E), the school principals were asked to indicate the extent to which they agreed or disagreed with the given statements describing causes of teacher emigration. An interpretation of their responses is shown in Table 5.5.

Table 5.5 Causes of teacher migration according to school principals - 2012

The following statements describe the reasons why secondary school teachers usually leave their home countries for other countries.

Reason	SD	D	A	SA	% A +SA	Total
Low salaries and other financial benefits	1	0	6	8	93	15
Poor economic conditions in the country	1	0	10	4	93	15
Poor school infrastructure and shortage of teaching and learning resources	1	3	7	4	73	15
Shortage/lack of housing for teachers	2	2	4	7	73	15
Lack of professional development opportunities	1	3	7	4	73	15
Political instability and violence	3	4	3	5	53	15
Natural disasters	6	4	3	2	33	15

Key: SD-Strongly Disagree; D-Disagree; A-Agree; SA-Strongly; Agree

Although the research sample comprised 19 school principal respondents (see Section 5.2) only 15 of them answered this specific question, with the rest declining, ostensibly because their schools had not lost teachers to other countries.

Data from Table 5.5 indicates that the majority (93%) of the 15 school principals who responded to Question 6 considered low salaries and other financial benefits and poor economic conditions in the source country as the main drivers of teacher emigration. Poor school infrastructure and shortage of teaching and learning resources, shortage/lack of housing and lack of professional development opportunities for teachers were considered significant push factors by 73% of the respondents who agreed or strongly agreed with the given push factors, while political instability and violence was considered less significant (53%). The majority (68%) of the respondents disagreed or strongly disagreed with the statement that natural disasters had contributed to teacher emigration in their respective countries, thus confirming that the Southern African region, which is part of the African continent not prone to natural disasters in general, had not experienced any major natural disasters in recent years.

The push factors given by the school principals who participated in the survey questionnaire correspond to those stated by the migrant teachers who responded to the questions in the self-administered questionnaire. Questions 7 and 8 in the migrant teachers' questionnaire asked the respondents to indicate the push and pull factors, respectively, which influenced their decision to migrate (see Appendix F). In Question 7, the respondents were asked to indicate the extent to which they agreed or disagreed with given statements describing the conditions which influenced their decision to emigrate from the source country. Table 5.6 and Figure 5.8 summarise the responses of the thirty (30) migrant teachers who participated in the survey.

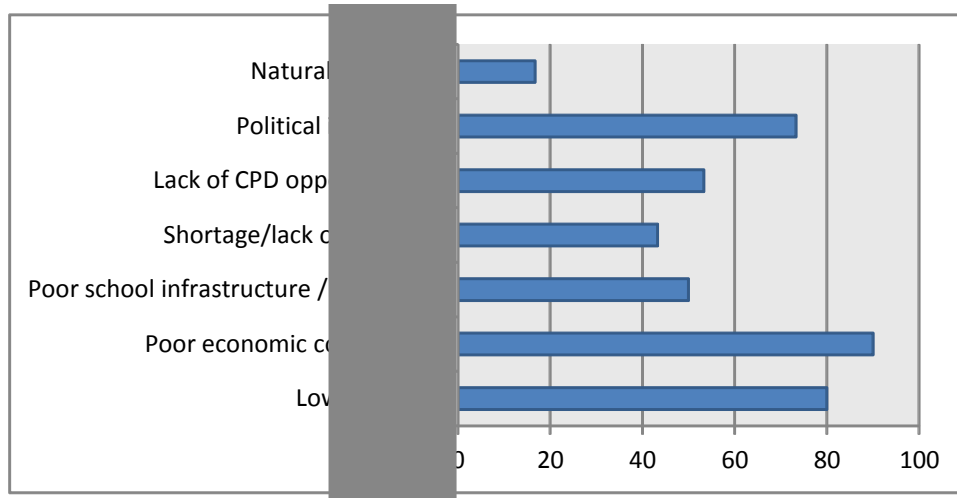
Table 5.6 Push factors determined by migrant teachers - 2012

Reason	SD	D	A	SA	% (A +SA)	Total No. of respondents
Low salaries & other financial benefits	0	6	9	15	80	30
Poor economic conditions in the country	0	3	11	16	90	30
Poor school infrastructure & shortage of materials	2	13	13	2	50	30
Shortage/lack of housing	7	10	10	3	43	30
Lack of CPD development opportunities	6	8	11	5	53	30
Political instability	4	4	8	14	73	30
Natural disasters	18	7	5	0	17	30

Key: SD-Strongly; Disagree; D-Disagree; A-Agree; SA-Strongly Agree; CPD-Continuing Professional Development

From Table 5.6 that reflects the responses of the 30 teachers who participated in the study on teacher migration, it is clear that the respondents considered poor economic conditions prevailing in the source country, and which include poor remuneration as the main reason for migration, followed by political instability. For a conceptual perspective on the reasons for teacher migration, the percentages which indicate the relative importance of each push factor for teacher migration are reflected in Figure 5.8.

Figure 5.8 Push factors for teacher migration determined by migrant teachers - 2012



Key: CPD - Continuing Professional Development

As shown in Table 5.6 and Figure 5.8, the majority of the migrant teachers who participated in the study (90%) either agreed or strongly agreed that their decision to emigrate was influenced by the general poor economic conditions in their countries of origin, followed by low salaries and other financial incentives (80%). Political instability was cited as a major push factor by 73% of the respondents, followed by lack of professional development opportunities (53%), poor school infrastructure and shortage of teaching and learning materials (50%) and lack of housing (43%). Natural disasters were insignificant in influencing the migrant teachers' decision to emigrate (17%). With regard to developing a strategy for managing teacher migration in the Southern African region, these results on the reasons for teacher migration should be considered as significant factors for the strategy to be viable.

Table 5.7 and Figure 5.9 summarise the pull factors for teacher migration as determined by migrant teachers in response to Question 8 of the survey questionnaire (see Appendix F). These factors 'lured' the migrant teachers to the respective countries of destination (Botswana, South Africa and Zambia).

Table 5.7 Pull factors for teacher migration determined by migrant teachers - 2012

Reason	SD	D	A	SA	%(A +SA)	Total
Higher salaries and other financial benefits	0	4	18	8	87	30
Better economic conditions in the country	0	2	16	12	93	30
Better infrastructure and well-resourced schools	0	8	18	4	73	30
Influence of relatives and friends	7	3	16	4	67	30
Availability of professional development opportunities	4	7	13	6	63	30
Political stability	0	2	20	8	93	30

Key: SD-Strongly Disagree; D-Disagree; A-Agree; SA-Strongly Agree

Figure 5.9 Pull factors for teacher migration determined by migrant teachers - 2012

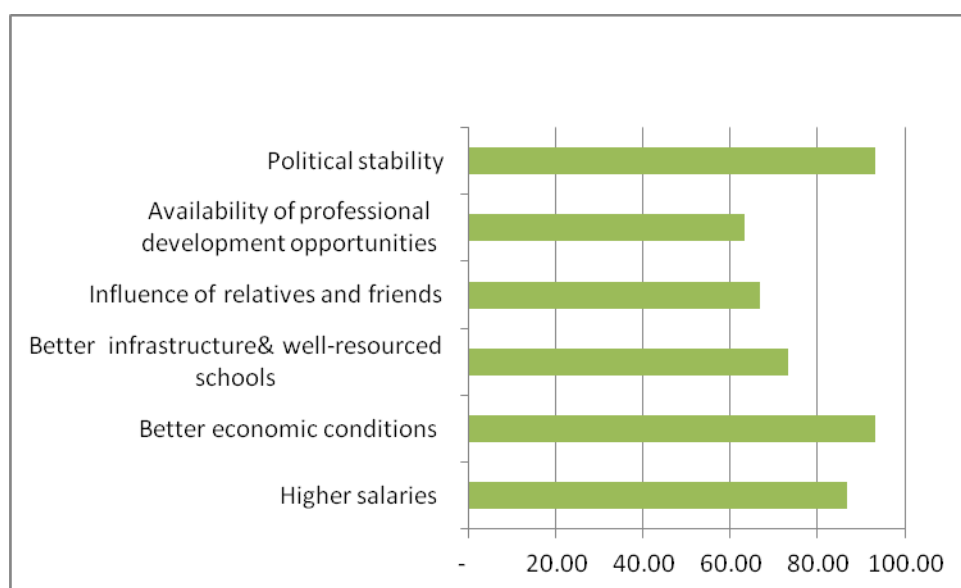


Table 5.7 and Figure 5.9 illustrate that, in order of prominence, the pull factors which ‘lured’ migrant teachers to the receiving countries in Southern Africa were better economic conditions in the destination country (93%), political stability (93%), higher salaries (87%), better infrastructure and resources (73%), influence of relatives and friends (67%) and availability of professional development opportunities (63%). A comparison of the push and pull factors discussed above reveals three significant determinants or causes of teacher migration in Southern Africa, namely, general economic conditions in the country, the

country's political situation and the level of salaries and quality of conditions of service. This implies that countries which want to retain their teachers or attract teachers from other countries should improve the general economic conditions in the country, maintain political stability, guarantee the safety and security of teachers and improve the teachers' salaries and conditions of service. In addition, the data imply that relatives and friends can be used purposefully to attract and support the cross-border recruitment of teachers, while creating opportunities for further education and continuing professional development which can also help to retain teachers locally or attract teachers from abroad.

5.6 EFFECTS OF TEACHER MIGRATION

With regard to an analysis of the data on the views of the school principal and migrant teacher respondents' on the effects of teacher migration on the quality of education at their schools, Table 5.8 summarises the opinions of the six (6) school principals who reported that their schools had lost teachers to other countries, and provided the data. The rest of the 19 school principals who participated in the quantitative investigation did not provide the requested data, thus limiting the analysis to six responses. In Question 7 of the self-administered questionnaire, school principals were asked to indicate the extent to which they agreed or disagreed with each of the given statements concerning the impact that the emigration of teachers had had on the quality of education in their schools (see Appendix E).

Table 5.8 School principals' views on the impact of teacher emigration on the quality of education at their schools -2012

Impact	SD	D	% SD+ D	A	SA	% A + SA	Total
The school has experienced teacher shortages	3	1	67	1	1	33	6
This has helped create employment for more teachers	2	0	33	2	2	67	6
There has not been any impact on the quality of education	1	0	17	3	2	83	6
Returning teachers have come back with new skills and expertise	2	0	33	2	2	67	6
Teachers in the diaspora have supported my school and teachers	2	0	33	1	3	67	6

Key: SD-Strongly Disagree; D-Disagree; A-Agree; SA-Strongly Agree

The data in Table 5.8 indicate that the majority of the school principals (83%) in the six (6) secondary schools which had sent/lost teachers to other countries and supplied the data felt that the emigration of these teachers had had no impact on the quality of education provided at their schools. These opinions of participating school principals may be attributed to the fact that only small numbers of teachers had left the participating schools (about two per school) and the fact that these migrating teachers could be easily replaced locally or with migrant teachers. Two-thirds (2/3) of the respondents reported that their schools had not experienced teacher shortages as a result of the emigration and that teacher emigration had actually helped to create employment for more teachers; that returning teachers had come back with new skills; and that teachers in the diaspora had supported their schools. The support given to schools by migrant teachers in the diaspora is confirmed by the majority of the migrant teachers participating in this study who reported that they had maintained professional networks with educators and schools in their countries of origin (see Figure 5.10). Despite the relatively small number of responses to question 7, the principals' responses provide essential information regarding the real and potential impact of teacher emigration in the six schools.

Table 5.9 presents the data on the impact of teacher immigration on the quality of education in some of the participating schools. The table summarises the responses of the ten (10) school principals (out of 19) who responded to Question 8 in the survey questionnaire, hence the analysis was limited to the 10 available responses. Question 8 asked the school principals to indicate to what extent they agreed or disagreed with each given statement describing the impact of teacher migration or lack of it on quality education (see Appendix E).

Table 5.9 School principals' views on the impact of teacher migration on receiving countries - 2012

Impact	SD	D	%SD+D	A	SA	%A+SA	Total
Migrant/expatriate teachers have helped mitigate teacher shortages.	1	0	10	4	5	90	10
Migrant/expatriate teachers have brought new skills and expertise.	0	2	20	5	3	80	10
There has not been any impact on the education system.	3	4	70	2	1	30	10
Migrant/expatriate teachers have negatively impacted on education.	6	1	70	2	1	30	10

Key: SD-Strongly Disagree; D-Disagree; A-Agree; SA-Strongly Agree

Table 5.9 indicates that, of the ten (10) school principals who responded to the question on the impact of migrant teachers or lack of it, the majority of them (90%) agreed or strongly agreed that migrant teachers had helped mitigate teacher shortages and 80% agreed or strongly agreed that migrant teachers had brought new skills and expertise to their school. Seventy per cent (70%) of the school principal respondents disagreed or strongly disagreed that there had not been any impact on the education system, and the same percentage (70%) disagreed or strongly disagreed that the impact made by migrant teachers had been negative. The above results indicate that the migrant teachers in the ten (10) schools which participated in the study and had their principals respond to Question 8 had made a positive contribution to their schools and the local education system by mitigating teacher shortages and bringing new skills and expertise.

The results from the survey questionnaire for migrant teachers indicate that migrant teachers had significantly benefited from teacher migration. Question 9 of the migrant teachers' questionnaire asked the migrant teachers to indicate the extent to which they agreed or disagreed with given statements describing the benefits they had accrued as a result of migrating to the respective destination countries, namely Botswana, South Africa and Zambia (see Appendix F. The results based on their responses are shown in Table 5.10.

Table 5.10 Benefits of teacher migration cited by migrant teacher respondents - 2012

Benefit	SD	D	A	SA	Total
Higher income	1(3%)	2(7%)	19(66%)	7(24%)	29(100%)
Acquisition of new knowledge, skills and expertise	0(0%)	5(17%)	16(55%)	8(28%)	29(100%)
Establishment of new networks and contacts	0(0%)	1(3%)	19(66%)	9(31%)	29(100%)
New cultural experience	0(0%)	2(7%)	21(72%)	6(21%)	29(100%)

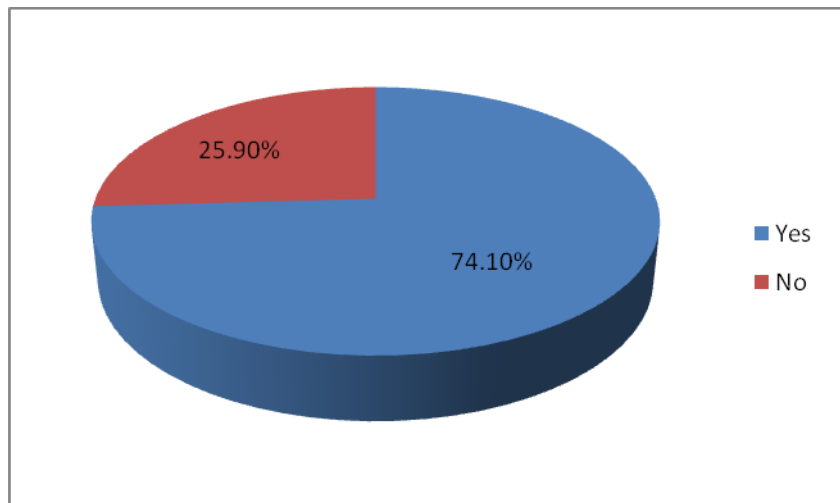
Key: SD-strongly disagree; D-Disagree; A-Agree; SA-Strongly Agree

Although 30 migrant teachers took part in the quantitative research, only 29 of them responded to Question 9, with one migrant teacher returning the questionnaire without answering Question 9.

The data in Table 5.10 show that the majority of the 29 migrant teachers who responded to Question 9 agreed that they had benefited from migration in terms of higher income, acquisition of new knowledge, establishment of new networks and new cultural experience. The vast majority of the respondents either agreed or strongly agreed that they had benefited from migration by establishing new networks (98%), gaining new cultural experience (93%), earning higher income (90%) and acquiring new knowledge (83%). It is important to note that better earnings were not among the top benefits cited by migrant teachers, but were only cited as a third benefit after professional networks and new cultural experience. This suggests that the migrant teachers who participated in the study value professional networks and new cultural experience more than the financial gains related to migration. Even then, the proportion of respondents who reported having gained financially was quite significant at 90%. From the data in Tables 5.10 and 5.11, both the school principals and migrant teachers who participated in the study concurred that teacher migration had been of benefit to the schools, the education systems of the destination countries and the individual migrant teachers. This implies that teacher migration should be viewed positively and be promoted in order to benefit both education systems and the encompassing teacher corps in terms of knowledge sharing and skills distribution.

Data from the survey questionnaire also revealed that the migrant teachers who participated in the study had maintained regular professional contacts with schools and teachers in the sending countries. In Question 11 of the self-administered questionnaire, the migrant teachers were asked if they had maintained regular professional contact with their former schools (see Appendix F). Figure 5.10 reflects the data obtained from the 27 migrant teachers who responded to this question. Three (3) of the 30 migrant teachers who participated in the quantitative study declined to answer question 11 citing personal reasons.

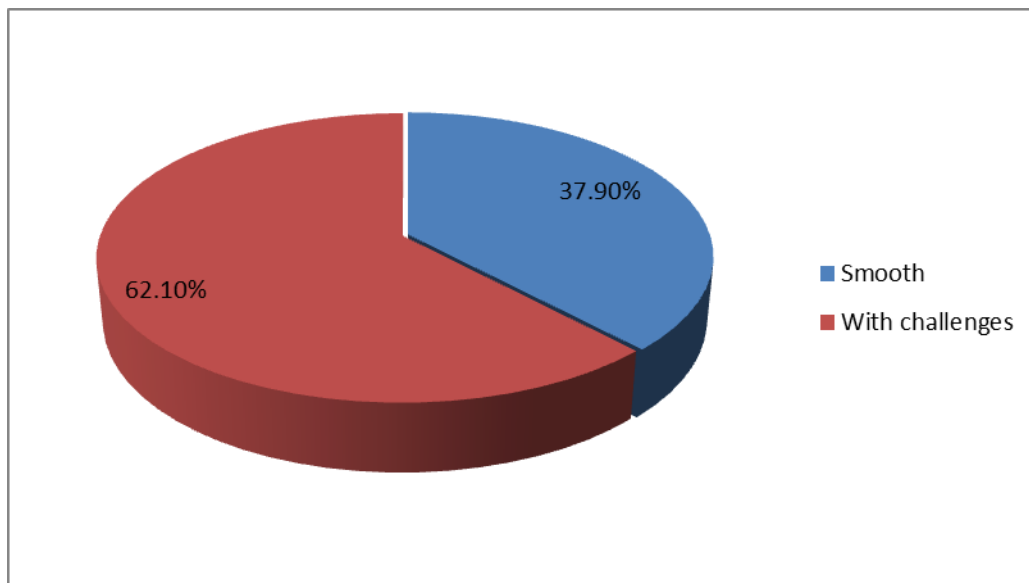
Figure 5.10 Proportion of migrant teachers who maintained regular professional contact with their former schools



As shown in Figure 5.10, the majority of the migrant teachers (74.1%) reported that they had maintained regular professional contact with teachers and schools in their countries of origin. These contacts mainly consisted of informal knowledge sharing and exchange via the mobile phone and e-mail. This implies that mobile technology has huge potential as a tool for promoting information exchange between migrant teachers in receiving countries and teachers in sending countries. The data also confirms the assertion made by Mazzucato (2008:70) that migrants promote knowledge diffusion between sending and receiving countries.

The recruitment process was not without challenges. In Question 12 of the self-administered questionnaire, the migrant teachers were asked to indicate if the recruitment process had been smooth and without problems or difficult with challenges (see Appendix F). The responses of the 30 migrant teachers who answered this question are shown in Figure 5.10.

Figure 5.11 Migrant teachers' perception of challenges with the migration process -2012



As shown in Figure 5.11, the majority of the 30 migrant teachers who responded to the survey questionnaire indicated that the recruitment process they went through was difficult with challenges (62.1%), with the remainder of them (37,9%) saying that the process had been smooth with no difficulties. The most significant challenge stated by the migrant teachers related to the difficult and lengthy process of acquiring and renewing work permits. It was reported that the process was characterised by too many bureaucratic procedures. The migrant teachers also indicated that it sometimes took long before one could get a job, particularly in public schools. They also stated that short-term contracts (usually one year or less in the Limpopo Province of South Africa and three years in Botswana) were problematic, as they caused job insecurity, made it difficult for migrant teachers to be promoted and meant going through another bureaucratic process of renewal at the end of the contract. In view of the foregoing, rationalising and speeding up the registration process would be an important step towards improving the management of teacher migration in Southern Africa.

5.7 SUGGESTIONS ON HOW TO MANAGE TEACHER MIGRATION VIABLY

This section focuses on the measures for improving the management of teacher migration in Southern Africa as was suggested by the school principals and migrant teachers who participated in the study.

5.7.1 Suggestions provided by school principals

The 19 school principals who responded to the survey questionnaire gave several suggestions on how to improve the management of teacher migration in their respective countries and in the Southern African region specifically. Question 10 of the self-administered questionnaire asked the school principals to suggest three (3) ways in which their school, country and other countries in the Southern Africa region could improve the management of teacher migration (see Appendix E). The school principals gave the following suggestions, in order of priority:

- Improve teachers' salaries and working conditions
- Process foreign qualifications and issue work permits quickly and effectively
- Train local teachers in scarce skills
- Create teacher exchange programmes
- Monitor the performance of migrant teachers
- Increase the duration of appointments/work permits
- Deploy migrant teachers equitably
- Create a database of migrant teachers
- Provide professional development opportunities for migrant teachers

As shown in the summary above, improving the teachers' salaries and conditions of service was the most significant proposition given by school principals for improving the management of teacher migration in Southern Africa. Providing housing, social security and allowances for teachers were considered key conditions of service by the school principals, particularly from Zambia, most likely because these were significant push factors (see Section 5.5). Improving the teachers' salaries and conditions of service would thus help to retain teachers locally and reduce teacher migration. The school principals also suggested speedy processing of foreign qualifications and work permits and increasing the duration of work permits to at least a year in order to avoid unnecessary disruptions to teaching and learning. One school principal even suggested that migrant teachers should be given permanent residence status after teaching for a certain period of time in the receiving country, as this would ensure that schools had an uninterrupted supply of teachers. To mitigate the shortage of teachers in scarce skills such as mathematics and science subjects the respondents suggested training young people locally, rather than rely on migrant teachers. This

proposition has several advantages, including employment creation and sustainability. In addition, the respondents proposed that the performance of migrant teachers should be closely monitored to ensure that they added value to the education systems of receiving countries, thus implying that poor performing migrant teachers should not be allowed to continue teaching in the respective receiving countries. The principals also suggested deploying migrant teachers equitably across the country to ensure that all schools, districts and provinces which need them benefitted. Though less frequently mentioned, creating a database and providing professional development opportunities for migrant teachers were also considered important measures to improve the management of teacher migration in Southern Africa.

5.7.2 Suggestions provided by migrant teachers

A number of suggestions on how to improve the management of teacher migration were identified by migrant teachers. In order of priority, the most significant propositions identified by the respondents, in response to Question 14 of the self-administered questionnaire (see Appendix F) were as follows:

- Improve teachers' salaries and working conditions
- Harmonise teacher qualifications and make sure teachers are fully qualified
- Ensure the Southern African Development Community (SADC) plays a coordinating role
- Process foreign qualifications and issue work permits quickly and effectively
- Offer long-term contracts to migrant teachers
- Provide in-service training and professional development to migrant teachers
- Protect migrant teachers from abuse and intimidation
- Facilitate family re-unions

As shown in the summary above, according to the migrant teacher respondents, the most important issue to address in improving the management of teacher migration in Southern Africa is to improve teacher salaries and conditions of service, particularly in the sending countries. The harmonisation of teacher qualifications and a stronger coordinating role by the Southern African Development Community (SADC) were cited as significant factors in the

management of teacher migration in the region. Migrant teachers also called for speedy processing of work permits, with some of them proposing that Ministries of Education should have a department dealing specifically with teacher migration issues. The migrant teachers also suggested that countries in the region should offer long-term contracts, provide orientation programmes to foreign teachers, and offer professional development opportunities to teachers across national borders. Protecting migrant teachers from abuse and xenophobic threats were identified as important factors to consider in a strategy to manage teacher migration in Southern Africa. The respondents also stressed the need for them to be given permanent residence status and to have their spouses and children join them in the destination country.

A close analysis of the suggestions proffered by both the school principal and migrant teacher respondents reveals five (5) common priority interventions for improving the management of teacher migration in Southern Africa. These interventions include the following: improve teachers' salaries and working conditions; process foreign qualifications and work and residence permits speedily; increase the duration of work permits or offer permanent job contracts; initiate teacher exchange programmes; and provide professional development opportunities for migrant teachers. These strategies may be used to both improve teacher retention and facilitate teacher mobility within the region. For example, improving teacher salaries and conditions of service may be used as a measure of retaining teachers in their source countries and thus minimising international teacher migration. Teacher exchange programmes may be used to facilitate teacher mobility across national borders so as to improve knowledge sharing and skills distribution. An effective strategy for managing teacher migration in Southern Africa should take these suggested factors into account and seek to both improve teacher retention and facilitate the cross-border mobility of teachers.

5.8 CONCLUSION

Chapter 5 focused on the analysis and presentation of the quantitative research findings of the empirical investigation. Data from the descriptive survey questionnaire, reflecting the views of the school principal and migrant teacher respondents were analysed in line with the research questions that focused on the statistical scope of teacher migration in terms of migrant teacher profiles and the causes and effects of teacher migration on sending and receiving countries and on migrant teachers themselves and their families. Chapter 5 also

provided essential demographic data on the number and gender composition of migrant teachers in Southern Africa, based on the primary data provided by the Ministry of Education and Skills Development in Botswana and the Department of Education in the Limpopo Province of South Africa. Data on the school principals' and migrant teachers' views on how to manage teacher migration in Southern Africa were also analysed, revealing common patterns for the effective management of teacher migration.

What was evident was that teacher migration data were patchy and incomplete and that Ministries/Departments of Education in the participating countries (Botswana, South Africa and Zambia) did not particularly have data on the number of teachers leaving the country. It was, for example, not possible to establish the total number of migrant teachers in Zambia owing to lack of adequate data with regard to teacher migration within the Zambian Ministry of Education. With regard to the South African teacher migration situation, information was not available on national level but on provincial level, namely Limpopo Province, bordering Zimbabwe, a major supplier of migrant teachers. Lack of adequate teacher migration data is a serious challenge, as it would make it difficult for governments in Southern Africa to plan and manage teacher migration effectively. However, although it was not possible to obtain complete and comparable teacher migration data for all three investigated Southern African countries, the available data provided some important insight into the statistical scope of teacher migration in Southern Africa; for example, the data revealed that the proportion of migrant teachers teaching in secondary schools comprised 2.6% of Botswana's and 4.6% of Limpopo Province's teaching force, for the years 2011 and 2010, respectively.

The data also reflected the male domination of teacher migration activities which was evident from Botswana and South African figures and which confirmed the sustainment of traditional family practices which expect women to care for the children, thus forcing many potential female migrant teachers not to migrate. What was also significant was the large proportion of Zimbabwean migrant teachers in Botswana and South Africa's Limpopo Province owing to these two countries' proximity to Zimbabwe as a major supplier of migrant teachers in the region. In this regard, the major source countries for migrant teachers in Southern Africa were determined to especially include Zimbabwe and India, with Zimbabwe emerging as the most significant source country in the region. Although comprehensive data could not be obtained on the level of inward migration to all the three countries participating in the study, namely Botswana, South Africa and Zambia, the available data from Botswana and South

Africa showed that both countries were major receiving countries which implied that a viable strategy for managing teacher migration in Southern Africa must take into account the contextual and other migration-related conditions prevailing in these two countries.

The data from the quantitative study also revealed that, in addition to being Zimbabwean, most of the migrant teachers who participated in the study were relatively young, falling within the 35-44 age range. The migration of a large proportion of younger and less experienced teachers from their source countries resulted in these countries losing their teaching personnel before they had accrued returns from investment in their training, thus resulting in brain drain. Inexperienced migrant teachers from Zimbabwe and elsewhere may be both an advantage and a disadvantage to the receiving countries such as South Africa and Botswana, given that these teachers come with little teaching experience, but with significant potential in that the majority of the migrant teacher participants were highly qualified, with 60% of them having either a Bachelor's or a Master's degree in education. Receiving countries which are able to retain younger migrant teachers with good skills, as reflected in their qualifications, may, therefore, accrue long-term benefits, owing to the number of years these teachers may work in the receiving countries.

In terms of subjects taught, it was evident that it is not only educators with scarce skills such as mathematics and science who migrate, but also teachers who teach in the social sciences. However, the proportion of business studies, information and communication technology (ICT), mathematics and science teachers was relatively high among the migrant teacher participants, thus confirming the need to pay particular attention to this category of educators in the management of teacher migration.

The three main determinants and causes of teacher migration in Southern Africa were determined to include the country's general economic conditions and political situation and teachers' salary levels and related financial benefits. These conditions can either serve as push factors, impelling teachers to migrate both within and from Southern Africa, or pull factors, enticing migrant teachers from both within and beyond the region into individual Southern African countries.

It was clear that migrant teachers generally made a positive impact on the quality of education in the participating schools, helping to mitigate teacher shortages in all subjects, but especially in mathematics, science, information and communication technology (ICT) and

business studies. In this regard, migrant teachers were valued for bringing new skills, experience and new teaching methods to the host countries in the region, while benefitting from migration in terms of socio-economic opportunities. It was, however, apparent that the migration process was fraught with challenges which mainly related to the slow and bureaucratic registration process. Delays in the accreditation of foreign teacher qualifications and issuing of work permits and teaching contracts linked to the short term nature of the migrant teachers' contracts resulted in much frustration.

Finally, strategies proffered by school principal and migrant teacher respondents concerning the management of teacher migration in Southern Africa mainly entailed viable teacher salaries and working conditions and the speedy processing of foreign qualifications and work and residence permits. Initiating teacher exchange programmes and providing professional development opportunities for teachers were also considered as meaningful in a migrant teacher managing effort. All of these strategies were considered significant to improve teacher retention in Southern Africa and individual countries in the region and to facilitate intra-regional teacher mobility. A stronger coordinating role by the Southern African Development Community (SADC) was perceived to be crucial in improving the management of teacher migration in the region. Considering the main causes of teacher migration which related to teacher salaries and economic and political conditions prevailing in the source and receiving countries, addressing the broader economic and political environment in Southern African countries appeared to be the most significant, sustainable, yet challenging way of managing teacher migration.

In Chapter 6, the qualitative research findings of the empirical investigation, which supplement the quantitative research findings for the sake of a deeper understanding of the teacher migration phenomenon, will be presented. In this regard analysed data from the in-depth individual interviews will be discussed.

CHAPTER 6

ANALYSIS AND INTERPRETATION OF QUALITATIVE DATA

6.1 INTRODUCTION

In Chapter 5, the research findings that emerged from the data that were quantitatively collected with a self-administered questionnaire were presented. The chapter addressed the statistical scope of international teacher migration, as well as its causes, effects and suggested measures for managing teacher migration in Southern Africa. Chapter 6 focuses on the qualitative research findings of the empirical investigation. The chapter analyses and presents data from the personal in-depth interviews, drawing on the views of teacher migration experts, Ministry/Department of Education officials, teacher union leaders, school principals and migrant teachers (see Section 5.2). The qualitative investigation complemented the quantitative study, thus contributing to a deeper understanding of teacher migration in Southern Africa.

The purpose of this study was to investigate the statistical scope of international teacher migration in Southern Africa, its main causes and effects, with a view to developing a strategy for managing teacher migration in the region. As was explained in Section 5.1, international teacher migration refers to the cross-border movement of teachers to establish themselves temporarily or permanently in another country and comprises emigration or outward teacher migration, and immigration or inward teacher migration (IOM, 2008:495). This study focused on both outward and inward teacher migration at secondary school level in Southern Africa (Botswana, South Africa and Zambia).

6.2 INTERVIEW GUIDE

The individual in-depth interviews conducted in this study were based on five (5) open-ended questions in the interview guide, constructed in line with the research questions (see Sections 1.4, 4.1 and 5.1; Appendix G). In essence, the various categories of representation, namely, teacher migration experts, Ministry/Department of Education officials, teacher union leaders, school principals and migrant teachers answered the same questions, with a slight variation in formulation, and with direct questions for migrant teachers. Having similar questions enabled the researcher to triangulate the data provided by the various categories of participants. In

Question 1, the participants were asked to identify the main causes of teacher migration in the Southern African region, with a slight variation for migrant teachers who were asked to state the main reasons why they had migrated to their respective destination countries. In Question 2, the migration experts, Ministry/Department of Education officials, school principals and teacher union leaders were asked to give the main benefits of teacher migration to the countries in the region, while the migrant teachers were asked to describe the migration process, from the time they left their country of origin to the time they were hired as teachers in the receiving country. In Question 3, the migration experts, Ministry/Department of Education officials, school principals and teacher union leaders were asked to give the main costs and disadvantages of teacher migration to the countries in the region, while in Question 4, the same categories of representation were asked to explain how migration had affected teachers and their families. For migrant teachers, Question 3 required them to indicate the most positive experiences and benefits they had accrued as a result of migrating to their respective destination countries, while Question 4 asked them to mention the challenges they had faced as a result of migration. In Question 5, all the participants were asked to suggest how teacher migration should be managed in Southern Africa.

The data collected was based on approximately one-hour interviews conducted with each of the interviewees. The interviews were recorded and transcribed soon after each session and the notes taken by the researcher during each interview and the transcribed data were saved on a computer memory stick and an online data base for security. The researcher then carried out open coding by organising the data into patterns, themes or categories. Several categories emerged from the open, axial and selective coding of the transcribed interviews and these categories in turn were constructed as themes to represent the interpreted and rationalised data as qualitative research findings. The three main themes are the causes, effects and management of teacher migration. These three main themes are discussed according to the perceptions of the participants representing the different categories of representation, namely the migration experts, Ministry/Department of Education officials, teacher union leaders, school principals and migrant teachers. In order to ensure confidentiality, anonymity and fluent discussions, when using verbatim excerpts to illustrate important findings, the participants are referred to as Migration Expert 1, 2 and so on, Education Officer 1, 2 and so on, School Principal 1, 2, and so on, Teacher Union Leader 1, 2 and so on and Migrant Teacher 1, 2 and so on.

Several causes of teacher migration were provided by the interviewees representing the different categories of participation, as discussed in Section 6.3.

6.3 CAUSES OF TEACHER MIGRATION

The migration experts' opinions regarding the causes of teacher migration in Southern Africa are discussed next, followed by the opinions of education officials, the opinions of teacher union leaders, the opinions of school principals, and the opinions of migrant teachers.

6.3.1 Causes of teacher migration from the perspective of migration experts

In response to Question 1 of the individual in-depth interviews, the migration experts provided rich data concerning the causes of teacher migration in Southern Africa. The researcher identified seven (7) major themes underpinning the causes of teacher migration, which emerged from the data gathered from the migration experts, namely, economic conditions; teacher salaries and conditions of service; political climate; school infrastructure and resources; career advancement; opportunity to travel; and teacher loss owing to the Human Immuno Deficiency Virus and Acquired Immuno Deficiency Syndrome (HIV and AIDS).

While the majority of the migration experts contended that the main causes of teacher migration in Southern Africa change according to contextual factors, their views converged in singling out economic conditions and salary differentials between countries, as well as political climate as the most significant determinants of teacher migration in the region. In explaining why many teachers migrate to South Africa and Botswana as receiving countries, the migration experts argued that teachers were forced to migrate by poor economic conditions, political factors, low salaries and general conditions of service experienced in their countries of origin and that they were 'lured' by better economic conditions and more attractive salaries in the two receiving countries. However, it should be noted that the socio-economic and political conditions perceived to be better in South Africa and Botswana by teachers in other countries in the region may not necessarily be considered better by local teachers when compared to conditions in developed countries. Everything is relative, as evidenced by the fact that South Africa also experiences significant outward teacher migration owing to socio-economic and political conditions in the country. For example,

Migration Expert 8 contended that poor remuneration had caused 10 000 South African teachers to migrate to the United Kingdom between 1997 and 2006 and cited poor working conditions, including lack of access to loans, poor infrastructural development in schools and poor transport networks as a major cause of teacher migration. Migration Expert 11 attributed the emigration of a significant number of South Africans at the advent of the new democracy in 1994 to political factors, arguing as follows:

'In the South African context, at the turn towards the dawn of the democratic era, there were some individuals who did not see themselves as being part of the new democratic system, distrusting the possibility of a successful democratic order, who then chose to leave'.

Migration Expert 11 indicated that some of the individuals who emigrated from South Africa as a result of the new democratic order in the country were teachers and that most of them went to Western countries such as the United Kingdom, Australia and New Zealand where the socio-economic and political conditions were perceived to be better by these educators.

With regard to the Zimbabwean teachers, the migration experts agreed that these teachers were basically forced to migrate by the economic situation in the country, characterised by hyper-inflation, a shortage of basic commodities, low salaries and political violence. Other significant factors driving teacher migration in Southern Africa were cited as career advancement and pursuit of better educational opportunities, particularly in South Africa, as well as the condition of teaching and learning resources, school infrastructure and the opportunity to travel and have different life experiences. The least important factor cited by the migration experts was the impact of HIV and AIDS on teacher attrition, leading to a higher demand for migrant teachers to replace those who had died.

These continent related factors were compounded by global factors, which created the demand for more teachers in other parts of the world, leading to teacher emigration from the Southern African region. Migration Expert 2 summarised the global demand for teachers as pertaining to Millennium Development Goals (MDGs), including universal primary education (UPE) and Education for All (EFA), as drivers of teacher migration in the Southern African region. Migration Expert 2 explained as follows:

'Beyond Southern Africa, specifically, there are also some global factors that arguably cause teacher migration. The global focus on education-related MDGs including the UPE and EFA initiatives, drive an increased demand for teachers. According to the UNESCO Institute for Statistics (UIS), among the 208 countries that reported teacher data for 2009, 112 will have a shortfall and collectively need at least two million extra teachers to meet the UPE goals'.

The global demand for teachers in order to meet international targets for education and local needs seems to be an important factor linked to globalisation. Following Migration Expert 2's argument quoted above, UNESCO Institute for Statistics (UIS) data reveals that South Africa needs to increase its teacher stock by at least 0.25% every year in order to meet Education for All (EFA) and Millennium Development Goals (MDGs) by 2015 (UIS, 2011:3). Zambia is classified among the 34 countries in the world with a severe teacher gap and has to increase the number of teachers by at least 3% annually to achieve the international targets for education by 2015. By contrast, the number of teachers required to achieve EFA and MDGs in Botswana is projected to decline by 0.6% every year (UIS, 2011:10). These projections imply that South Africa and Zambia are likely to continue recruiting more teachers both locally and internationally in order to meet the demand, while Botswana is likely to reduce the number of migrant teachers. A viable strategy for managing teacher migration in Southern Africa should take these projections on teacher supply and demand into account.

6.3.2 Causes of teacher migration from the perspective of education officials

According to the interviewees from the Ministry of Education and Skills Development in Botswana and the Department of Education in Limpopo Province (South Africa), the main causes of teacher emigration include relatively lower salaries and other financial benefits such as housing and transport allowances, poor school infrastructure and shortage of teaching and learning resources in the source countries, compared to more positive conditions with regard to these economic-related factors in the major destination countries in the West and the Middle East. However, both interviewees reported that outward teacher migration had not been fully documented and was insignificant, with most of the educators leaving the teaching profession to join other professions locally. Education Officer 1 explained teacher attrition conditions in Botswana as follows:

‘Botswana has experienced teacher attrition, with a number of teachers joining other government departments or the private sector. However, Botswana is planning to supply teachers to Namibia in the near future’.

The decision by some teachers to join other government departments or the private sector suggests that salaries and conditions of service are better in these sectors compared to the education sector. Furthermore, Botswana’s plan to supply teachers to Namibia may be considered a positive step, given the projected decline in the demand for teachers in Botswana (see Section 6.3.1). The use of the word ‘supply’ implies that Botswana may be contemplating moving towards organised teacher recruitment, potentially through the signing of a bilateral agreement with Namibia. However, the envisaged organised teacher recruitment plan should be carefully implemented to avoid creating teacher shortages in Botswana, especially with regard to teachers of indigenous languages such as Setswana which will be difficult to counteract via teacher migration (see Section 5.4.1).

Concerning inward teacher migration, the participants from Botswana and South Africa, as receiving countries, attributed teacher immigration to the oversupply of teachers and economic and political instability in other Southern African countries such as Zambia and Zimbabwe. The main pull factors were considered to be the acute shortage of mathematics and science teachers and the better economic conditions and conditions of service in the receiving countries. The apparent oversupply of teachers in Zambia was confirmed by the participant from the teacher’s union in the country (Teacher Union Leader 3) who revealed that *‘in 2006 there were over 15 000 unemployed qualified teachers in Zambia’*. However, it should be noted that the perceived over supply of teachers in countries such as Zambia mainly relates to weak teacher management and insufficient budgetary provision resulting in the government of the sending country failing to employ these teachers, regardless of the fact that class sizes and learner-to-teacher ratios in the sending country remain relatively high.

A further analysis of the data provided by teacher unions and the other categories of participants reflects a general convergence of opinion concerning the push and pull factors for the teacher migration phenomenon in Southern Africa, as reflected in the analysis of the data provided by the teacher union leaders below.

6.3.3 Causes of teacher migration from the perspective of teacher union leaders

The three (3) teacher union leaders who participated in this study shared similar views with the migration experts concerning the causes of teacher migration in Southern Africa (see Section 6.3.1). An analysis of the data gathered through the individual in-depth interviews from the three teacher union leaders revealed six major themes explaining the causes of teacher migration in the region, namely, economic conditions; salaries and conditions of service; career development; political unrest; teacher demand and adventure.

The three (3) teacher union leader participants gave general economic conditions, salaries and conditions of service as the main causes of teacher migration in their respective countries. For example, Teacher Union Leader 3 explained as follows with regard to the negative conditions prevailing in Zambia that affect teacher migration: *‘Poor salaries and conditions of service and delayed promotions are the main factors causing Zambian teachers to emigrate’*. The result is that low teacher morale arising from poor teacher salaries, coupled with delays in processing promotions, and teachers’ insufficient allowances and delays in their payment influenced some Zambian teachers to leave the country.

With regard to the factors ‘luring’ migrant teachers into Botswana and South Africa as receiving countries, the participants cited better economic conditions, better salaries and more attractive conditions of service as the main pull factors. With reference to Botswana as an example of a country with significant pull factors for teacher migration, Teacher Union Leader 1 identified these positive factors as follows:

‘Better economic prospects and conditions of service in Botswana attracted migrant teachers to the country. Foreign teachers are offered better conditions of service than local educators and these include hefty gratuity, a scarce skills allowance, promotion to leadership positions, institutional accommodation, a flight ticket every year to visit their families, and at the end of their contract, migrant teachers have their property transported back to their countries of origin at government expense.’

The generous conditions of service for migrant teachers available in Botswana do not seem to be the norm in South Africa, where foreign educators tend to experience less-favourable conditions of service compared to local educators. As discussed in Section 6.4.5, these less-favourable conditions of service for migrating teachers in South Africa pertain to hampering bureaucratic procedures involving the processing of qualifications, work permits and teaching contracts for migrant teachers and the negative effect of these procedures on the migrant teachers' income, career progression and promotion prospects.

With regard to organised teacher recruitment between Botswana and India, Teacher Union Leader 1 pointed out that the demand for special subject teachers such as mathematics, science, business studies, and information and communication technology (ICT), was one of the major reasons for this organised teacher recruitment, while political unrest and its impact on the Zimbabwean economy were considered as the main reason why Zimbabwean teachers decided to migrate to Botswana and South Africa. In this regard, Teacher Union Leader 1 argued that *'bilateral agreements on education with other countries like India assisted the Government of Botswana with science based subject teachers because of teacher scarcity in that area locally'*, that is, the Botswana context. The other important cause of teacher migration stated by the teacher union leaders was the teachers' pursuit of further studies in order to advance their teaching careers. None of the unions mentioned poor infrastructure, or shortage of teaching and learning resources as important drivers of teacher migration in their respective countries, thus suggesting that these were less significant factors to teacher unions.

The next section reflects the views of the seven (7) school principals who participated in the individual in-depth interviews regarding the causes of teacher migration in Southern Africa.

6.3.4 Causes of teacher migration from the perspective of school principals

An analysis of the data provided by the seven (7) school principals who participated in the individual in-depth interviews revealed four major categories or themes, which explain the causes of teacher migration in Southern Africa, namely, teacher shortages; salaries and conditions of service; political instability; and poor planning on macro level. The school principals argued that the shortage of special subject teachers, particularly accounting, mathematics and science teachers locally had created a demand for foreign educators. For example, School Principal 1 described the demand-driven cause of teacher migration, forcing

South Africa to recruit teachers from other countries in the Southern African Development Community (SADC) region, as follows:

'The shortage of relevant skills in the school, particularly that of mathematics and science educators, has forced the Department of Education to recruit educators with special skills from SADC countries to meet the demand'.

Low salaries and poor conditions of service in sending countries such as Zimbabwe and relatively higher salaries and better conditions of service in the Limpopo Province of South Africa and in South Africa in general were given as significant factors impacting on teacher migration in the region. School Principal 7 summarised these causes by stating that *'educators migrate for better salaries, better working conditions and better residential areas'*. Political instability, particularly in Zimbabwe, was cited as a major reason why some of the migrant teachers decided to migrate, with School Principal 5 arguing that *'political instability in other countries and poor working conditions are major causes of teacher migration in Southern Africa'*. Some of the participants cited what they perceived to be *'poor manpower planning and management'* (School Principal 2) by the South African Department of Education for persistent teacher shortages in South Africa. Some of the management issues raised by the participants related to delays in the accreditation of foreign teacher qualifications, processing of work and residence permits and teaching contracts for migrant teachers, as well as the renewal of these documents when they expire, an issue further discussed in Section 6.6.

The school principals' views captured through the individual in-depth interviews seemed to confirm those of the survey questionnaire in identifying poor salaries and conditions of service, as well as political factors as some of the main causes of teacher migration in Southern Africa (see Section 5.5). However, teacher demand and poor planning on macro level by the Ministry/Department of Education, as causes of teacher migration are new issues that were not captured through the quantitative study, thus confirming the value of complementarity in a mixed-methods quantitative-qualitative research approach as used in this study on teacher migration in Southern Africa.

6.3.5 Migrant teachers' reasons for choosing to migrate

This section analyses and presents data obtained from the ten (10) migrant teachers who participated in the individual in-depth interviews. In Question 1 of the interview the migrant teachers were asked to state the main reasons why they had decided to migrate to the respective destination countries (see Section 6.2). Five (5) major themes emerged from an analysis of the interview data, namely, general economic conditions; political violence; teacher salaries; further studies; and better work-related opportunities.

The majority of the 10 migrant teachers who participated in the individual in-depth interviews informed the researcher that they had decided to leave Zimbabwe because of the poor economic conditions in the country. According to the participants, the poor economic conditions in Zimbabwe, coupled with hyperinflation, a high cost of living and serious shortages of basic commodities 'forced' them to leave the country. Describing the situation in Zimbabwe before departure, Migrant Teacher 2 mentioned the following: *'The future at home looked bleak as the economy had a meltdown, so I decided to leave'*. The participants stated that they chose South Africa as a destination country because it was perceived to have better economic opportunities in the region, complemented by relaxed border control.

Political violence emerged as the second most significant cause of teacher migration cited by the interviewees. The participants indicated that teachers in Zimbabwe were usually targeted by political activists because they were perceived as being sympathetic to the political opposition in the country and wielding influence in the communities in which they worked. For their own safety, the teachers decided to leave Zimbabwe and 'seek refuge' in neighbouring countries. Migrant Teacher 5 expressed his reason for choosing South Africa as a destination country as follows: *'I went to South Africa where there was peace and respect for human rights'*. Seeking better opportunities for further studies abroad was also identified as a reason for teacher migration by some of the migrant teacher participants.

Poor salaries emerged as the third most significant determinant of teacher migration from Zimbabwe to South Africa, which Migrant Teacher 1 confirmed as follows: *'I was earning a salary that could not sustain my simplistic living, so I decided to leave the country'*. The fact that poor salaries emerged as the third most significant determinant of teacher migration cited by the migrant teacher participants implies that it is not as dominant a cause of migration as

usually thought. Contextual environmental conditions such as the general state of the economy and the political climate in the country seemed to act more significantly as push or pull factors, particularly with respect to Zimbabwean migrant teachers. However, it should be noted that salaries cannot be delinked from the general economic conditions prevailing in the country, since the performance of the economy usually determines salary levels, the cost of living and purchasing power.

From the analysis of the interview data, the researcher noted that individual teachers' decisions to migrate were generally based on a single dominant factor, with one or two additional factors being subsidiary to the primary one. Identifying these dominant factors may be an effective way of determining a viable strategy for managing teacher migration in Southern Africa. The results of the qualitative investigation corroborated those of the quantitative investigation by means of which the migrant teachers identified three (3) key determinants of teacher migration in Southern Africa, namely, the country's economic conditions, its political climate and teacher salary levels (see Section 5.5). The next section presents a discussion of the results from the qualitative data on the effects of teacher migration in Southern Africa (Botswana, South Africa and Zambia).

6.4 EFFECTS OF TEACHER MIGRATION

In this section, the researcher discusses the findings on the effects of teacher migration on the countries of origin and the countries of destination in Southern Africa and the effects of teacher migration on individual migrant teachers and their families. The findings from the qualitative data collected from migration experts, Ministry/Department of Education officials, teacher union leader representatives, school principals and migrant teachers who participated in the study are discussed.

6.4.1 Effects of teacher migration from the perspective of migration experts

The eleven (11) migration expert participants cited a number of benefits and disadvantages/costs of teacher migration to both sending and receiving countries and to migrant teachers and their families. Eight (8) major themes which represent the main benefits of teacher migration to destination and sending countries emerged from the coding and analysis of the collected data, namely, sharing/acquisition of skills; alleviation of teacher

shortages; improvement of educational quality; productivity; cultural diversity; remittances; diaspora communities; and job creation. The majority of the migration experts interviewed argued that migrant teachers had brought new skills and different teaching methods to the destination countries. They also contended that migrant teachers had helped alleviate teacher shortages in destination countries and that this had helped achieve local and international targets for education, such as Education for All (EFA) goals. Migration Expert 3 buttressed the benefit of alleviating teacher shortages brought by migrant teachers to South Africa, as follows:

‘In terms of South Africa...the benefit is that the shortage of teachers in mathematics and science in South Africa has been addressed by Zimbabwean teachers, particularly in the South African Province of Limpopo, which borders Zimbabwe, but even elsewhere, foreign teachers have been alleviating teacher shortages by addressing local needs’.

The migration experts also argued that receiving countries such as Botswana and South Africa had benefited by hiring trained migrant teachers without investing their own resources in teacher education, a phenomenon Migration Expert 1 called *‘brain gain’*. The migration experts further contended that, since the majority of teachers who migrated were generally those who were highly skilled and experienced, this contributed to the improvement of learning outcomes and educational quality in the receiving countries. As revealed by Migration Expert 6, this was because *‘migrant workers tend to be more productive than the local labour force’*. The generally higher commitment and productivity of migrant teachers, compared with that of local teachers was also confirmed by school principals and teacher unions (see Sections 6.4.2 and 6.4.4).

Cultural diversity was cited as another important benefit brought by migrant teachers to receiving countries. For example, Migration Expert 4 described how the United States of America had benefitted from South African teachers as follows:

‘American schools are particularly very ethnocentric and Americans are geographically illiterate, so exposure to other languages and

cultures in the classroom is really important and that is why in the [United] States [of America] South African and other teachers are admitted under H1-B [employment] and J-1[educational and cultural exchange] visas which are cultural exchange visas. And the idea is that migrant teachers are there for cultural contribution and artistic exchanges’.

Remittances were cited as an important benefit to source countries, especially if they were used to support community projects and businesses, as these often resulted in employment creation and the improvement of the general standard of living. The migration experts also stressed the importance of diaspora communities, arguing that such communities support educational and other programmes in countries of origin. Migration Expert 6 revealed that *‘the International Organisation for Migration (IOM) runs a diaspora engagement programme’*. According to the explanation of Migration Expert 6, the diaspora network functions as follows:

‘Diaspora communities in Europe have established links with source countries in Africa. An important component of this programme is the twinning of institutions, including schools and missions [short term visits] undertaken by migrants in the diaspora. In the case of education, such arrangements help to improve skills exchange and capacity building in Ministries of Education and schools.

Migration Expert 6 further revealed that in 2011, the International Organisation for Migration (IOM) and Zambian Government developed a framework for diaspora engagement, targeting Zambian professionals, including teachers in South Africa and the United Kingdom. The migration experts also argued that teacher migration had also led to job creation in both the sending and receiving countries, an important benefit, particularly for countries with excess numbers of qualified teachers such as Zambia (see Section 5.4.2).

Teacher migration was not without costs or disadvantages, particularly to source countries. An analysis of the interview data supplied by the migration experts revealed four main categories of disadvantage to source and destination countries in Southern Africa. These disadvantages pertained to brain drain; training costs; new context; and privatisation. The

majority of the migration experts interviewed argued that teacher migration had led to the depletion of human capital and caused financial losses in source countries, mainly owing to training costs incurred by the state. In the case of Zimbabwe as a sending country, Migration Expert 10 argued that teacher migration had seriously affected the efficient delivery of education services, describing the impact of brain drain as follows:

'Teacher loss to migration resulted in large class sizes and a fall in the quality of teaching and learning in Zimbabwean schools. The emigration of qualified and experienced teachers, particularly between 2006 and 2008 affected public examinations, resulting in serious delays in the marking of examination scripts and announcement of the results'.

Challenges related to the integration of migrant teachers in receiving countries were cited as another disadvantage cited by the migration experts. Without sufficient integration mechanisms in place, the new context and culture, including unfamiliarity with local languages and customs, usually made it difficult for migrant teachers to adjust and teach effectively. Migration Expert 2 summarised the importance of context as follows:

'The disadvantage of teacher migration to the region is that often the new [migrant] teacher from elsewhere has little or no understanding of the context in which he/she will be teaching. As context determines education, this can be a disadvantage in terms of delivering quality education to the learners'.

The migration experts also argued that teacher migration had led to privatisation of education, evidenced by the proliferation of low cost private schools. For example, Migration Expert 5 revealed that such private schools were quite common in South Africa and that *'the supply of cheap, yet highly qualified teachers, particularly from Zimbabwe, is fueling the proliferation of low-cost private schools'*. Migration Expert 4 concurred, arguing that teacher migration from the Southern African region and elsewhere was helping to staff private schools in the United States of America (USA) and the United Kingdom (UK), known as charter schools and academies, respectively.

Several benefits accrue to individual teacher migrants. Three major themes emerged from the open-coding of the data collected from the migration experts through the individual in-depth interviews, namely, further studies/career development; remittances; and networks. The majority of the participants argued that migrant teachers usually acquired additional qualifications and skills which improved their performance, productivity and earnings. Furthermore, the migration experts revealed that migrant teachers sent remittances to support the livelihood and well-being of their families who usually remained in the source country. Sending such remittances was possible because migrant teachers generally earned higher salaries in the destination countries, compared to what they earned in their countries of origin before migrating. This was confirmed by Migration Expert 9 who revealed that *'some teachers from Southern Africa have been recruited to the Gulf States and the conditions of service are generally good, allowing the migrant teachers to support their families back home'*.

An analysis of the data collected from the migration experts revealed several challenges faced by migrant teachers. Six major themes emerged from the coding of the data related to the challenges confronting migrant teachers, namely, deskilling; threats/xenophobic attacks; impact on families and children; temporary appointments; less pay; and culture shock. The migration experts asserted that migrant teachers were often undervalued in their new work environment and paid less than their local counterparts. This was usually caused by non-recognition of foreign qualifications or perceived lack of equivalency in teaching qualifications. The situation was exacerbated by what Migration Expert 6 described as *'a plethora of licensing regimes'*. Migration Expert 6 argued that *'licensing may serve as a protective mechanism and a restrictive bar upon migrant teachers, forcing them to resort to less paying jobs, a phenomenon known as brain waste'*. In concurrence, Migration Expert 5 described the steps Zimbabwean or other foreign teachers were expected to undertake for them to be hired in South African public schools, as follows:

- Apply to the Ministry of Home Affairs for a work permit;
- Apply to the South African Qualifications Authority (SAQA) to have qualifications assessed for equivalency;
- Apply to the South African Council for Educators to get a teaching licence; and,
- Apply to the Department of Education for employment.

Migration Expert 5 explained that some Zimbabwean migrant teachers usually tried to circumvent the slow and bureaucratic registration process by seeking employment in low-cost private schools which generally pay much less than public schools and offer little job security. As revealed by Migration Expert 5, the situation is exacerbated by the fact that *'there are no clear guidelines on the process foreign teachers need to follow to be employed in public schools'*. The bureaucratic registration process and delays in the processing of work permits and contracts for migrant teachers were confirmed by school principals and migrant teachers (see Sections 6.4.4 and 6.4.6), thus, implying that the issue of registration is an important aspect to address in the management of teacher migration, particularly in South Africa.

Deskilling was cited by the migration experts as a serious challenge affecting a number of migrant teachers in Southern Africa. Migration Expert 1 provided an explanation of the deskilling phenomenon understood as brain waste and its effects on foreign educators, as follows:

'Most of the experienced teachers who go to better countries end up not teaching, or if they were heading a school they end up not being in charge, so out of frustration such teachers may end up doing odd jobs, even the worst being cleaning; a qualified teacher ending up as a cleaner in another country is a worst case scenario and this is brain waste'.

Discrimination, threats and xenophobic attacks were cited by the migration experts as another major challenge confronting migrant teachers, particularly in South Africa. Migration Expert 1 argued that migrant teachers were sometimes threatened and attacked because they were perceived as *'stealing'* jobs from the locals and that xenophobia often led to perpetual fear, and loss of confidence and self-esteem on the part of migrant teachers. Migration Expert 11 expressed a strong opinion on xenophobia as encountered in South Africa and which relates to perceiving the migrant teacher as a personal threat to one's own economic position. Migration Expert 11 proclaimed as follows:

'Many locals interpret the migrant as a personal economic threat rather than a resource. This poses a serious challenge to the

conceptions of respect for diversity and democratic opening up of South Africa to the continental responsibilities for growth and development. Xenophobia, in my view, is one of the most serious concerns that the new South Africa has to deal with head on’.

The migration experts also contended that migrant teachers usually left their spouses and children in source countries, resulting in family separation and isolation. Children were often forced to stay with a single parent or relatives and, as a result, missed the appropriate parental guidance, support and affection. Migration Expert 3 explained the impact migration had on Zimbabwean migrant teachers working in South Africa as follows:

‘Many Zimbabwean teachers live transnational lives: travelling across the border to see wives, children, extended families, check on their businesses etc. during school holidays. It [migration] has split up families, distanced families, led to divorce etc’.

These challenges confronting migrant teachers and their families often led to a dilemma for migrant teachers, described by Migration Expert 2 as follows:

‘In the studies I have done, I have encountered migrant teachers living in a struggle - wanting to be with their families, but yet feeling a sense of duty to provide for them and making sacrifices to do so. Reports of frustration and depression are not uncommon...’

Culture shock was cited as one of the challenges confronting migrant teachers in Southern Africa. Migrant teachers had to adapt to a new culture, often alien to them. The inability of many migrant teachers to understand and communicate in the local languages often caused frustration and made it particularly difficult for the migrant teachers to interact freely with fellow educators and the local community.

6.4.2 Teacher union leaders' perspective on the effects of teacher migration

The three (3) teacher union leaders participating in the study were asked to describe the main costs and disadvantages of teacher migration to their country. Their responses were analysed and coded, revealing three major themes, namely, brain drain; unemployment; and a negative impact on union actions. The teacher union leaders argued that the emigration of qualified and experienced teachers had resulted in teacher shortages in Botswana, South Africa and Zambia, especially in mathematics and science subjects, thereby forcing the governments of Botswana and South Africa to resort to hiring migrant teachers to fill the gap. Within its context of not enough schools and, therefore, large class size (see Section 6.3.2), Zambia managed to fill the skills gap with newly qualified educators from teacher training colleges and universities. However, the loss of highly experienced special subject teachers was perceived to have a negative impact on the quality of education in Zambia and the other two countries participating in the study. The teacher union leaders considered the emigration of qualified teachers a brain drain, as the government had invested in the training of these teachers. Illustrating this point, Teacher Union Leader 2 said:

'One of the challenges of teacher migration is that South Africa is also losing a lot of money, which is around R151 million through [the] Funza Lushaka bursary scheme which targets teachers in critical skills areas such as mathematics and science and technology ... training them in South African universities ... most of them leave the country to other countries such as Britain and Canada after completion of their studies because the Department of Education cannot place them on time in much needed rural areas. They are also forced to migrate because of better salaries in other countries. The other challenge is that as a country we cannot benefit from professional skills of such teachers whom we have invested a lot in'.

The teacher union leaders also argued that teacher immigration caused the unemployment of local teachers. In this regard, Teacher Union Leader 1 claimed that *'multitudes of teacher graduates are mushrooming in the streets, whereas some migrant teachers are still employed in public schools'*. Furthermore, the teacher union leaders asserted that migrant teachers often

undermined union actions like strikes and boycotts because most of them were not union members, thus implying that migrant teachers should be recruited as union members. The brain drain challenge raised by the teacher union leaders confirms the views of the migration experts (see Section 6.4.1), while the claim that teacher migration causes local teacher unemployment and undermines teacher union efforts such as strikes seems to be an exclusive opinion of the teacher union leaders who participated in the study, rather than the majority of the participants, as it was not raised by the other interviewees.

With regard to the positive impact and advantages of migration, the teacher union leaders revealed that the employment of migrant teachers had helped to mitigate local teacher shortages, especially in mathematics and science subjects, an advantage also shared by the migration experts, Ministry/Department of Education officials and school principals (see Sections 6.4.1, 6.4.3 and 6.4.4). The union leader participants also revealed that migrant teachers were usually willing to assist the school administration in carrying out several school tasks, including extramural activities, which they claimed was not always the case with local teachers. Confirming this, Teacher Union Leader 1 revealed: *'Migrant teachers are always willing to assist the school administration on other school related errands and are handy in extra-curricular activities'*. Nevertheless, it should also be noted that migrant teachers may sometimes cooperate with the school administration out of fear rather than benevolence, in order to safeguard their employment and ensure that their contracts are renewed when they expire.

The impact of international teacher migration on individual migrant teachers and their families was considered significant by the representatives of the teacher unions. On a positive note, the teacher union leaders indicated that migrant teachers were earning relatively higher salaries compared with what they earned in the sending countries before emigrating, thus enabling them to acquire assets and establish businesses in their countries of origin. On a negative note, Teacher Union Leader 1 revealed that, while education was free in Botswana, this was not the case for migrant teachers who were *'required to pay school fees for their children, forcing some of them to send their children back home'*. The participants also revealed that, unlike the locals, migrant teachers were not allowed to engage in business to supplement their income. Furthermore, the teacher union leaders argued that international teacher migration had negative effects on the family fabric, with Teacher Union Leader 3 stating that many teachers who had migrated from Zambia had left their spouses and families

behind, resulting in family break-ups. With respect to foreign educators in Botswana, Teacher Union Leader 1 claimed that *'some migrant teachers become delinquent and abandon their families and get exposed to vulnerable health diseases'*.

Another disadvantage noted by the teacher union participants was that returning teachers were not always rehired in their countries of origin, thus resulting in destitution and loss of skills or brain waste. In the case of Zambia, Teacher Union Leader 3 mainly attributed this to *'the high number of unemployed graduate teachers in the country'* and the fact that some of the teachers had left without following the appropriate procedures for resignation. Migrant teachers sometimes had problems gaining local acceptance and integration, a point described by Teacher Union Leader 2 as follows:

'Some of the challenges of migrant teachers into South Africa are societal acceptance, as sometimes they are wrongly perceived as taking jobs of South Africans, especially in rural areas and townships where there is a lot of unemployment. The other challenge is language as most people in rural and poor township schools are not proficient in English as a medium of education [instruction] and, therefore, there is a need to explain some of the terms in South African home languages and some of the migrant teachers are not familiar with those languages'.

The perception that migrant teachers took jobs from the locals and their lack of proficiency in local languages made it difficult for the migrant teachers to better connect with learners, parents and local communities, sometimes leading to xenophobic threats or attacks.

6.4.3 Education officials' perspective on the effects of teacher migration

Interview data from the individual interviews with the two (2) participants representing the Ministry of Education and Skills Development in Botswana and the Limpopo Province of South Africa, respectively, were analysed, revealing three (3) major themes considered to describe the effects of teacher migration in Southern Africa. The themes related to teacher shortages; skills and expertise; and quality education. While conceding that they did not have sufficient evidence concerning the impact caused by teacher emigration to the education

systems of their countries, in terms of teacher immigration, the education officials argued that migrant teachers had helped mitigate teacher shortages, particularly in mathematics and science subjects in Botswana and South Africa, as receiving countries. According to the interviewee from the Ministry of Education and Skills Development, Botswana encountered teacher shortages in physics, chemistry and mathematics. While teacher shortages in chemistry and mathematics were diminishing, the demand for physics teachers remained high. Similarly, the Limpopo Province of South Africa experienced teacher shortages in mathematics and science subjects. According to Education Officer 2, *'the shortages were caused by the closure of colleges of teacher education and the legacy of Apartheid which marginalised blacks in areas of mathematics and science'*. This implied that, for South Africa to increase the number of mathematics, science and teachers of other subjects substantially, it should reconsider opening colleges of teacher education and increasing the number of specialist educators who fall in the categories of those segments of the population that were marginalised under Apartheid.

The education officials also contended that migrant teachers had brought new skills, expertise and experience to Botswana and South Africa, as receiving countries, which helped to improve the quality of education in these countries. In this regard, Education Officer 1 claimed that *'learner performance in mathematics and science improved relatively because of migrant teachers'*. In view of the positive contribution of migrant teachers cited above, one would conclude that foreign educators have helped Botswana and the Limpopo Province of South Africa to provide quality education in the critical areas of science and mathematics, thus helping to spur development and achievement of Millennium Development Goals (MDGs) and Education for All (EFA).

6.4.4 School principals' perception of the effects of teacher migration

Five (5) main themes related to the effects of teacher migration arose from the analysis of the data obtained from the in-depth individual interviews conducted with school principals, namely, skills and teaching experience; teacher shortages; disruptions related to short-term teaching contracts; orientation and integration; and impact on families. In terms of teacher emigration, the school principals posited that their schools had lost experienced educators, with School Principal 7 stating that *'we have lost very good educators to better paying teaching jobs outside the country'*. The loss of experienced educators, particularly in

mathematics and science, coupled with low numbers of graduates from universities, forced a number of schools to become dependent on migrant teachers.

In terms of teacher immigration, the findings arising from the data analysis reflect that school principals generally appreciated the contribution migrant teachers had made to their schools. The most common benefit cited by the school principals was that migrant teachers provided skills that were not available locally, particularly in mathematics, sciences, agriculture and accounting, thus helping to mitigate teacher shortages. For example, School Principal 6 stated that *'migrant teachers have reduced the shortage of educators in those scarce skills subjects substantially'*. In addition to possessing vital knowledge and skills, the school principals also noted that migrant teachers had brought new teaching styles and approaches. Two of the school principals also remarked that school results had significantly improved as a result of engaging migrant teachers, thus confirming the claim made by the education officials on migrant teachers enhancing the quality of education provided (see Section 6.4.3).

The school principal participants cited a number of disadvantages and challenges affecting teacher migration and migrant teachers. The most significant challenges related to the delays in processing foreign educators' work permits and contracts; short-term contracts; adapting to the local curriculum; the impact on the families of migrant teachers; and meeting the accommodation needs of migrant teachers. School Principal 6 summarised the challenges related to work contract arrangements faced by the school and migrant teachers, as follows:

'The main disadvantage is that they [migrant teachers] are not permanently employed. Every year the school has to renew their contracts and this causes delays in the processing of their salaries. Secondly, the school is unstable because one is never sure that contracts could be renewed'.

Delays in the processing or renewing of migrant teachers' contracts and work permits and the impact of these delays on the school are further illustrated by School Principal 1's comment that *'migrant teachers take a number of days on leave sorting out paper work with the Department of Home Affairs or the Department of Education, instead of teaching'*.

The school principal participants contended that migrant teachers sometimes faced challenges adapting to the local curriculum and the culture and practices of the receiving country, of which indigenous languages as the unofficial language of teaching and learning, is a major challenge. School Principal 1 also revealed that '*some foreign educators struggle with the schooling system*'. The impact of teacher migration on the family fabric was described as one of the challenges confronting migrant teachers in South Africa, with School Principal 3 claiming that '*teacher migration disturbs the normal functioning of households and children are sometimes raised by one party only, which is most often the mother*'. In addition to being a global phenomenon, this implies that teacher migration is also a gender issue affecting women and men in various ways. Furthermore, the participants reported that some migrant teachers commuted regularly between South Africa and Zimbabwe, often at the end of the month to visit their families. While such regular travel may be an option, it may be expensive and leave the migrant teachers fatigued, which impacted negatively on teaching and learning.

The results from the individual in-depth interviews with school principal participants confirmed and complemented the results from the survey questionnaire, by emphasising that migrant teachers have helped mitigate teacher shortages and brought new skills and expertise to the receiving countries (see Section 5.6).

6.4.5 Migrant teachers' perspective and experiences regarding the effects of teacher migration

During the individual in-depth interviews, the ten (10) migrant teachers who participated in the study were asked to state the most positive experiences and benefits they had accrued as a result of migration. The data collected was coded and analysed, revealing three major themes as benefits of migration that accrued, namely, better salaries; a higher standard of living; and professional growth. Higher income had enabled the migrant teachers to send remittances to Zimbabwe, support their families, send their children to better schools and acquire assets such as houses. The availability of opportunities for further study in South Africa, as a receiving country, compared to Zimbabwe, as a source country had enabled some migrant teachers to improve their professional qualifications. The following statements by the migrant teacher participants summarise the benefits of migration for migrant teachers:

Migrant Teacher 1: *'A better salary helped me to buy things that I could not afford back home'*.

Migrant Teacher 5: *'Although the income I am currently earning is not enough I have been able to purchase a reasonable number of assets'*.

Migrant Teacher 6: *'I managed to support my family and send my children to better schools'*.

Migrant Teacher 7: *'I built my own house'*.

Migrant Teacher 8: *'I have been more exposed to technology in the form of computers'*.

Migrant Teacher 10: *'I managed to further my studies and obtain higher qualifications'*.

The additional qualifications acquired by some of the foreign educators became an added advantage when the migrant teachers applied for extension or renewal of their teaching contracts and work permits. The additional qualifications also enabled the migrant teachers who decided to return to Zimbabwe to go back with higher qualifications which contributed to improving the quality of the country's education system.

The above benefits of teacher migration revealed through the individual in-depth interviews with migrant teacher participants corroborated with those benefits determined with the quantitative investigation. The benefits determined with the quantitative investigation pertained to higher salaries with accompanying standard of living advantages related to salaries, and the possibility of engaging in further studies and professional development as the main benefits accrued to migrant teachers as a result of international teacher migration (see Section 5.6). However, establishing new networks and having a new cultural experience, which also emerged as key benefits from the quantitative study, were not raised as benefits for migrating teachers from the individual in-depth interviews. This was possibly because the priorities of the 10 migrant teachers from Zimbabwe who participated in the individual in-depth interviews were different from those of the rest of the migrant teachers who responded to the self-administered questionnaire.

The ten (10) migrant teachers who participated in the individual in-depth interviews were also asked to state the least positive experiences or challenges they had faced as a result of migration (see Section 6.2). An analysis of the coded data revealed the following challenges that were confronting migrant teachers: unfair treatment at work; xenophobic threats;

integration; and challenges related to the registration process. The interviewees revealed that unfair treatment in the work place was rife, making many migrant teachers feel marginalised and lose their self-esteem. Xenophobic threats were said to be common, forcing many migrant teachers to live in fear. In this regard, Migrant Teacher 5 reported that *'discrimination towards foreigners is rife'* and Migrant Teacher 2 claimed that *'sometimes foreign educators are treated like outcasts'*. Integration challenges related to the local culture and languages were perceived as a serious hurdle by many of the participants. Migrant Teacher 7 revealed, for example, that *'learning to adjust to a new culture was not easy'*. The participants also claimed unfair treatment by the Department of Education, most of it related to the registration process of foreign workers.

The lengthy registration process and delays related to issuing of work and residence permits by the authorities were cited as major challenges confronting migrant teachers in South Africa. The registration process in South Africa and challenges related to it are illustrated in a transcribed testimonial provided by Migrant Teacher 8, presented in Box 6.1. The full testimonial is presented in order to understand migrant teachers' challenges with the registration process conceptually and to capture all the useful insights projected in Migrant Teacher 8's personal experiences regarding the teacher registration process in South Africa.

Box 6.1 A migrant teacher's experience of the teacher registration process in South Africa - 2012

'There are so many reasons why migrant teachers end up in South Africa. Some come by choice mainly to look for better opportunities but most are pushed from their countries by problems such as wars, political persecutions and crumbling economies.

The first problem encountered is that of regularizing ones stay in the country. Getting papers from Home Affairs is a nightmare. For one to be able to apply for a work permit, one has to first of all have his qualifications verified by the South African Qualifications Authority (SAQA), a process which takes a lot of time depending on the fee that you are able to afford. The faster you need your certificate the more you have to pay. Based on the fact that most migrant teachers will be coming from poor problem countries they are forced to settle for the least fees which means that their process will take three months or more despite the fact that SAQA says that it has three options, 10, 20 and 30 days. This is mainly due to the fact that everything is centralised in Pretoria. After getting the SAQA certificate you still need to apply for a work permit with Home Affairs, an expensive process which takes plus or minus six months, depending on your circumstances. Having a work permit does not guarantee you employment, and to worsen the situation, most of the permits clearly stipulate that you can only work legally as a teacher, so if you do not get a teaching job, there is no other way of earning an income within the confines of the law.

After securing employment your qualifications still have to be verified by the National Department of Basic Education in Pretoria before you can be given a salary scale. This is another lengthy process that takes more than four months. Meanwhile you will be receiving what they call a survival salary. It takes ages for salaries to be processed after signing a new contract and some teachers go for the whole term-three months-without a salary. In some cases the results from the two verifying institutions do not tally and those from the National Basic Education Department end up superseding SAQA's findings.

You also need to register with The South African Council of Educators (SACE), as it is a requirement to such an extent that in most provinces and individual schools you cannot be considered for employment if you are not registered. The process of registering with SACE can also take more than three months. The biggest problem is that the registration processes can, by no chance run concurrently because one registration is a prerequisite of the other.

Having a work permit cannot land you a permanent job unless you acquire permanent residence status, so most migrant teachers work on contract basis. The contracts range from one month to a year but in most cases it is less than six months. Once your contract expires you will find yourself back in the streets unless they [the authorities] decide to renew it. Trying to secure another job after contract expiry or termination is a process to which you cannot assign a time frame because, from personal experience, it took me more than six months to have my contract renewed by the Department of Education’.

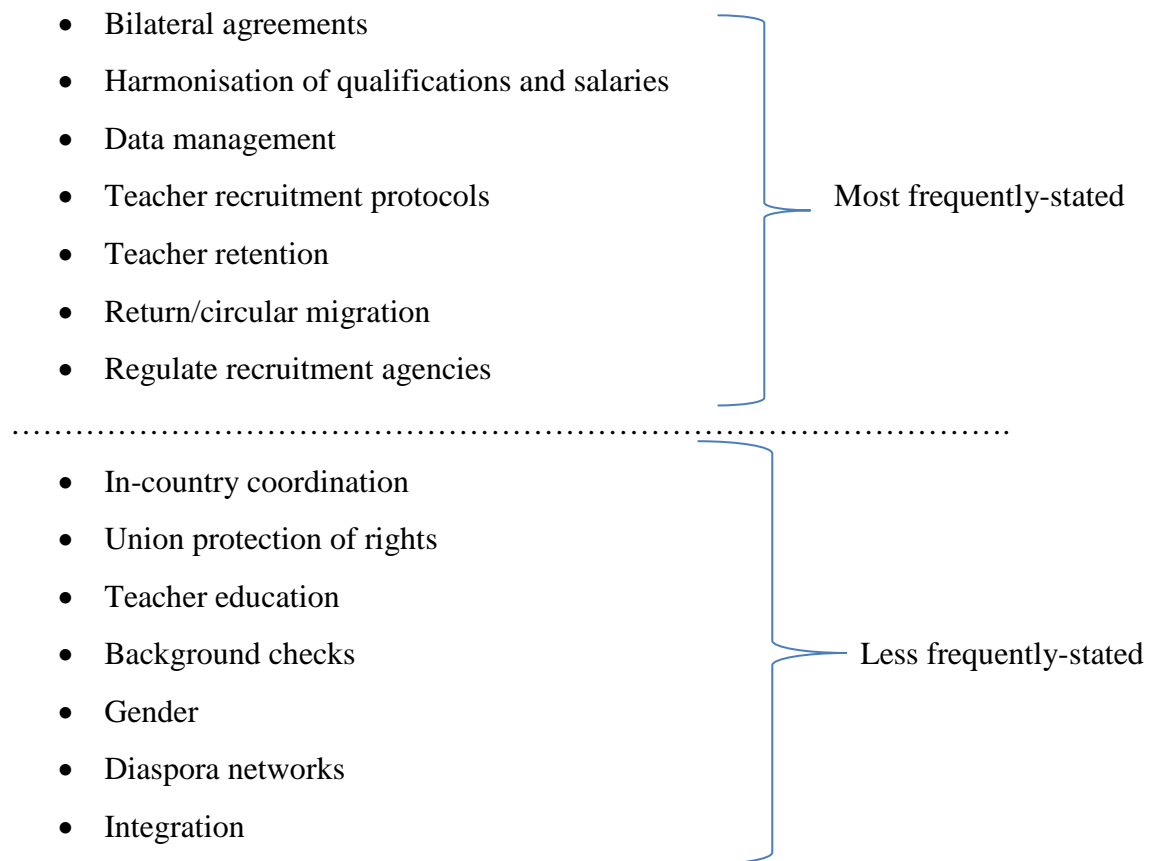
The personal experience of Migrant Teacher 8 provided in Box 6.1 corroborates the evidence provided by the migration experts and school principals who participated in the qualitative study that the registration process was slow, bureaucratic and negatively affected teaching and learning in participating schools (see Sections 6.4.1 and 6.4.4). This, therefore, implies that one of the key policy interventions in the management of teacher migration in Southern Africa should be to simplify and speed-up the process of applying for, and renewing work and residence permits and teaching contracts.

6.5 MANAGING TEACHER MIGRATION IN SOUTHERN AFRICA

This section presents the perspectives of migration experts, education officials, teacher union leaders, school principals and migrant teachers on how to manage teacher migration in Southern Africa. A summary of the common elements emerging from the analysis of the data collected from the various categories of participants co-informs the proposal that is eventually developed in this study for a viable management of teacher migration in the Southern African region.

6.5.1 Migration experts' perspective on how to manage teacher migration

The eleven (11) migration experts who participated in the personal in-depth interviews proffered a number of suggestions on how to manage teacher migration in Southern Africa. The open-coding process undertaken by the researcher revealed a total of 13 major themes encapsulating recommendations on how to improve the management of teacher migration in Southern Africa. Each of these themes suggests a possible policy intervention which can be applied to improve the management of teacher migration in the Southern African region. These themes are presented below, in order of priority, to encapsulate the most frequently-mentioned to the less frequently-stated aspects to consider in managing teacher migration effectively.

- Bilateral agreements
 - Harmonisation of qualifications and salaries
 - Data management
 - Teacher recruitment protocols
 - Teacher retention
 - Return/circular migration
 - Regulate recruitment agencies
-
- In-country coordination
 - Union protection of rights
 - Teacher education
 - Background checks
 - Gender
 - Diaspora networks
 - Integration
- 

The migration experts who participated in the individual in-depth interviews were in agreement that there was very little organised recruitment of migrant teachers in Southern Africa. In this regard Migration Expert 6 proclaimed as follows: *'We do not have any sustainable way of managing migration at the moment'*. Migration Expert 7 further contended that a sustainable way of managing migration, including international teacher migration in Southern Africa, should be led and coordinated by the Southern African

Development Community (SADC). However, the migration experts cautioned against devising rigid measures for managing international teacher migration in the region, arguing that teacher migration should be managed cautiously, in order to avoid infringing on the rights of individual teachers to migrate. To that effect, Migration Expert 7 argued that *'the approach should be to create an enabling environment rather than prescriptions'*. Migration Expert 7 further argued that *'migration will continue to happen in today's globalised economy and that governments must not try to stop it, but make sure it happens in a responsible way'*.

The majority of the migration experts strongly argued that bilateral agreements would help improve the management of teacher migration in Southern Africa and curtail the exploitation of migrant teachers and the abuse of their rights. The migration experts also recommended the harmonisation of teacher qualifications and salaries in Southern Africa, arguing that such harmonisation would facilitate the free movement of professionals in the region and ensure that migrant teachers were accorded the same status as local teachers. Harmonisation of teacher salaries in the region would, according to the migration experts, also help to reduce brain drain related to salary differentials between countries.

Noting the absence of complete and reliable data on teacher migration and migration in general in the Southern African region, the migration experts argued for a better mechanism of capturing and tracking data on teacher supply, teacher demand and teacher migration. As stressed by Migration Expert 2, *'the compilation of reliable migration data will require coordination across different government agencies and departments, such as Ministries of Education and Home Affairs and between and among countries'*. The availability of complete and reliable data on teacher migration is essential, as it would improve manpower planning and facilitate the signing of bilateral agreements and teacher exchange programmes.

Teacher recruitment protocols were proposed as an important tool for managing teacher migration in the Southern Africa region. The migration experts suggested the use of the Commonwealth Teacher Recruitment Protocol (CTRP), the African Union Protocol (yet to be completed) or/and the development of a new teacher mobility protocol for the Southern African Development Community (SADC) region. Stressing the significance of the CTRP as a tool for managing teacher migration in Southern Africa, Migration Expert 1 contended:

‘Teacher migration in the Southern African region can be managed by using the Commonwealth Teacher Recruitment Protocol that was produced by the Commonwealth Secretariat after consulting various people. It is an excellent tool for countries to manage teacher migration...the responsibilities of a teacher once they leave a country and where they land are very clearly spelt out in that booklet and also the responsibility of governments and education ministers receiving migrant teachers are also very clearly articulated’.

Similarly, if developed, a teacher recruitment protocol for Southern Africa proposed by the migration experts could contain important principles governing teacher migration, including the obligations of member states in ensuring the protection of the rights of migrant teachers and their families. However, Migration Expert 5 warned that establishing protocols would not be easy *‘because powerful countries in the region like South Africa which are benefiting from inward migration are unlikely to support the move’*. The additional challenge cited by the migration experts was that, even if a teacher migration protocol for Southern Africa was adopted, it would be difficult to enforce, other than based on moral terms. In this regard, Migration Expert 11 contended that *‘any protocol across countries is likely to be very difficult to enforce except in moral terms’*. In essence, a protocol has no legal force and can only succeed if the relevant parties voluntarily decide to implement it, thus implying that other teacher migration instruments such as conventions, which, once adopted by a country, become legally binding, should also be considered.

The migration experts also spoke in favour of ensuring teacher retention to minimise push factors by improving teacher salaries and conditions of service, as well as offering hardship stipends for teachers working in rural and remote areas. Promoting return migration and circular migration within the region was cited as an important element which should be taken into account in designing a strategy for managing teacher migration in Southern Africa. This implies that higher employment opportunities should be created for returning teachers, particularly, taking into account the teacher unions’ claim that returning teachers were not always rehired, often resulting in some of them becoming destitute (see Section 6.4.2).

The less frequently-stated factors for managing teacher migration in Southern Africa identified by the migration experts included the following: strengthening in-country coordination among various government agencies dealing with migration; ensuring that teacher unions recruit migrant teachers as members and defend their rights; strengthening and expanding teacher education systems to meet teacher demand; carrying out sufficient checks on the criminal background of migrant teachers; addressing the gender dimension of teacher migration; establishing and strengthening diaspora networks to encourage knowledge exchange; and instituting integration and support programmes for migrant teachers and their families. Stressing the need for background checks on migrant teachers, Migration Expert 9 cited an incident where a migrant teacher who was a convicted paedophile was hired in a certain receiving country and went on to abuse children in the new school '*because background checks were not carried out on the migrant teacher*'. This implies that education authorities should vet migrant teachers before they recruit them and this may be done through a police clearance from the migrant teacher's source country or several references from credible sources. However, instituting effective background checks on migrant teachers with refugee status or on those migrant teachers who fled political violence in their countries of origin may be difficult, partly because of the possibility that the violence may be perpetrated by the police.

6.5.2 Education officials' perspective on how to manage teacher migration

The participants from the Ministry of Education and Skills Development in Botswana and the Department of Education in the Limpopo Province of South Africa proffered a number of options for managing teacher migration in Southern Africa. An analysis of the qualitative data elicited from the education officials' opinions on teacher migration management revealed the following major categories that encapsulate proposals on how to manage teacher migration in the region:

- Bilateral agreements
- Data on migrant teachers
- Commonwealth Teacher Recruitment Protocol (CTRP)
- Teacher protocol for Southern Africa
- Targeted recruitment

- Speedy processing of work permits

The signing of bilateral agreements between countries was considered essential by the education officials, with Education Officer 1 explaining that *'ensuring that there is a memorandum of understanding on teacher migration between two or more countries can improve the management of teacher migration'*. Signing and implementing bilateral agreements on teacher migration may also help curb abuse of migrant teachers' rights, described by Education Officer 1 as *'common in private schools'*. As indicated by Education Officer 1, *'updating data on migrant teachers is important'*. Keeping comprehensive data on teacher migration is a prerequisite for effective planning related to teacher supply and demand and implies that Southern African countries should also include international teacher migration data in their Education Information Management System (EMIS). Complying with the provisions of the Commonwealth Teacher Recruitment Protocol (CTRP) and developing a teacher recruitment and mobility protocol for Southern Africa were also proffered as essential, confirming the proposal made by the migration experts on this matter (see Section 6.5.1).

The Ministry/Department of Education officials also suggested targeted teacher recruitment in order to ensure that *'only foreign educators with scarce skills are allowed to enter the country'* (Education Officer 2). The proposition by the education officials to bar certain categories of teachers from entering the country for employment purposes, while complying with the provisions of the Commonwealth Teacher Recruitment Protocol (CTRP), as suggested by the same education officials in the preceding paragraph, seems to be a contradiction, given that the CTRP guarantees the rights of individual teachers to migrate. Timeous processing of work permits by the Department of Home Affairs and reviewing them regularly was also stated as an essential way of improving the management of teacher migration in Southern Africa. Notably, the education officials did not refer to delays in the accreditation of teacher qualifications and awarding of teaching contracts, despite the fact that these delays were cited as a matter of concern by the migration experts, school principals and migrant teacher participants (see Sections 6.4.1, 6.4.4 and 6.4.5), possibly because the registration process wholly or partly fell under their ministries/departments.

6.5.3 Teacher union leaders' perspective on how to manage teacher migration

Data collected from the three (3) teacher union leaders who participated in the qualitative investigation was analysed and coded, resulting in the following major themes, given in order of priority:

- Bilateral agreements
- Harmonisation of teacher qualifications and salaries
- Data base
- Salaries
- Union recruitment of migrant teachers
- Professional development
- Recruitment agencies

In accordance with the opinions of the migration experts and education officials (see Sections 6.5.1 and 6.5.2), the teacher union leaders argued that an effective teacher migration strategy in their respective countries and the Southern African region at large should be based on bilateral agreements between governments to ensure harmonisation of teacher qualifications and salaries in the region. The importance of bilateral agreements was highlighted by Teacher Union Leader 3, who argued that *'bilateral agreements will enable countries with excess qualified teachers such as Zambia to export them to neighbouring countries'*. In terms of content, Teacher Union Leader 1 suggested that bilateral agreements *'should avail the same conditions of service to the same professionals without discrimination'*, thus implying that bilateral agreements can be used to protect and promote the rights of migrant teachers.

Furthermore, the teacher union leaders viewed the development and maintenance of an accurate database of migrant teachers by the Ministries/Departments of Education of the different countries as essential in the management of teacher migration in Southern Africa. The teacher union leaders further indicated that teacher unions were in a position to maintain such a database of their members who were migrant teachers, stressing the need to recruit migrant teachers as union members and defend their rights. Teacher Union Leader 2 stressed the importance of maintaining a data base for migrant teachers. In Teacher Union Leader 2's own words, *'a database of migrating teachers, both inside and outside the country, should be*

kept by the Department of Education or teacher organisations'. In order to improve teacher retention, the teacher union leaders argued that it was necessary for governments of Southern Africa to improve teacher salaries and other conditions of service. In this regard, Teacher Union Leader 3 felt strongly that *'there should be an improvement and harmonisation of teacher salaries and conditions of service in Southern Africa'*. The implication of improving and harmonising teacher salaries and conditions of service in Southern Africa is that this may facilitate teacher mobility, while at the same time promoting teacher retention in the region. The teacher union leaders further suggested that migrant teachers should be used as resource persons in professional development programmes for local teachers. Finally, the teacher union leaders argued that governments should regulate the activities of recruitment and private employment agencies. In this regard, Teacher Union Leader 2 argued that *'there is a need to ensure that teachers who are migrating into or outside the country are protected from exploitation from private employment agencies'*. Regulating the activities of recruitment agencies might ensure ethical recruitment practices and minimise violation of migrant teachers' rights.

6.5.4 School principals' perspective on how to manage teacher migration

An analysis of the data elicited from the individual in-depth interviews conducted with the seven (7) school principals who participated in the qualitative investigation revealed five (5) major interventions for managing teacher migration in Southern Africa. Given in order of priority, from the most frequently-stated interventions to the least significant in terms of frequency, the suggested interventions were:

- speeding up the assessment and accreditation of the qualifications of migrant teachers
- monitoring the performance of migrant teachers
- employing only those migrant teachers with scarce skills
- improving the salaries and conditions of service for teachers
- initiating teacher exchange programmes

The majority of the interviewees argued that speeding up the processing of work permits and job contracts was necessary to ensure that learners did not lose learning time due to the unavailability of educators. One way of ensuring that teaching and learning time is not at risk,

according to School Principal 1 is to ensure that *'the migrant teachers' employment should be processed long before they actually report for duty at the school'*. Offering permanent employment to migrant teachers was considered essential to ensure stability in the teaching force, with Principal 7 advising the Government of South Africa to *'naturalise foreign educators immediately'*. Systematic monitoring of the performance of migrant teachers was also considered essential by the school principal participants, as illustrated by School Principal 4's argument that *'the Department of Education should improve the assessment of foreign educators and a better measuring tool should be introduced to ensure quality'*. This proposition seems to suggest that some migrant teachers were not performing according to expectation. While improving the assessment of educators may be necessary in order to improve the learners' performance, selective monitoring of the performance of migrant teachers, to the exclusion of local educators, may be perceived as discriminatory by the migrant teachers and elicit negative reactions. Ideally, all teachers in the destination country, whether foreign or local, should work under the same conditions of service. Employing only those migrant teachers with scarce skills such as mathematics, science, business studies and information and communication technology (ICT) was proffered as an essential intervention by the school principals who participated in the qualitative study. The school principals suggested that teachers of other subjects such as languages and social sciences should be recruited from local candidates. According to Principal 2, this would create *'equal job opportunities for the locals and create a balanced workforce'*. Increasing teacher salaries and improving the conditions of service for teachers was proffered as an essential intervention to reduce migration-related teacher attrition and to maximise teacher retention. Finally, teacher exchange programmes were considered important by the school principal participants, thus implying that a teacher mobility scheme should be introduced in Southern Africa.

6.5.5 Migrant teacher perspective on how to manage teacher migration

From an analysis of the individual in-depth interviews with the 10 migrant teachers who participated in the qualitative investigation, six (6) major categories emerged which underpin possible policy interventions for managing teacher migration in Southern Africa. These categories are in two columns and pertain to the following:

- Harmonisation of teacher education, qualifications and salaries
- Orientation and professional development programmes

- Bilateral and multilateral agreements
- Speeding-up processing of qualifications, work permits and job contracts
- Improvement of teacher salaries and conditions of service
- Verification of qualifications and background checks

The majority of the migrant teachers who participated in the individual in-depth interviews argued for the harmonisation of teacher education, teacher qualifications and teacher salaries in the Southern African Development Community (SADC) region. In this regard, Migrant Teacher 9 recommended as follows: *'Teacher education should be common in SADC with a similar curriculum'*. Similarly, Migrant Teacher 3 argued for the creation of comparable working conditions for teachers across Southern Africa stating that *'SADC governments should improve [teacher] salaries, working conditions and infrastructure across the region'*. The implication of harmonising teacher education and salaries in the SADC region is that this may facilitate the free movement of teachers in Southern Africa. Furthermore, harmonising teacher education in Southern Africa would imply that common professional teaching standards are developed and adopted in the region.

Orientation and professional development programmes for migrant teachers, particularly in the local curriculum, were considered important by the migrant teacher participants, with Migrant Teacher 10 suggesting that education officials should *'give them [migrant teachers] the opportunity to develop in their profession, especially in the new curriculum'*. This implies that education authorities should institute orientation and professional development programmes for migrant teachers and that such programmes should mainly focus on the curriculum of the destination country. Furthermore, the participants argued for the signing of bilateral and multilateral agreements, described by Migrant Teacher 4 as *'government-to-government agreements'* in order to protect migrant teachers from exploitation. The migrant teachers' perception that bilateral and multilateral agreements would protect them from exploitation implies that such agreements should specify the terms and conditions of the teacher exchange programmes between and among the countries involved, including the rights and obligations of the sending and receiving countries, thus potentially reducing exploitation of the migrant teachers' rights comprehensively. The migrant teachers also contended that teachers' salaries and conditions of service, including housing and the availability of appropriate teaching and learning resources, should be improved, thus

reducing push factors and improving teacher retention. To that end, teacher unions were cited as important in ensuring that the rights of migrant teachers were protected, with Migrant Teacher 5 suggesting that *'a regional teachers' union should be established'*. In addition, the migrant teachers suggested that authorities should speed-up the processing of qualifications, work permits and teaching contracts for migrant teachers. Speeding up the registration process was, according to Migrant Teacher 3, necessary *'to enable migrant teachers to earn a salary legally in South Africa'*. This, therefore, implies that delaying the processing of teacher qualifications and issuing of work permits and teaching contracts can force migrant teachers to work illegally in the country, usually in lowly-paying jobs, thus resulting in deskilling or brain waste.

Finally, the migrant teacher interviewees felt strongly about the verification of teaching qualifications and background checks on migrant teachers. In this regard, Migrant Teacher 7 suggested that *'authorities must verify the teachers' qualifications thoroughly'*, while Migrant Teacher 6 insisted that *'authorities should make sure that the teachers who are employed are genuinely qualified'*. This seemed to suggest that there might be migrant teachers whose qualifications may not be genuine or below the required local standard.

Table 5.12 provides a summary of the top five (5) proposals for managing teacher migration in Southern Africa proffered by each of the following categories of interviewees who participated in the qualitative study: migration experts, education officials, teacher union leaders, school principals and migrant teachers. Colour-coding was used to denote common propositions proffered by more than one category of participants. The suggestions only given by one category of participants are not colour-coded.

Table 6.2 A summary of the key proposals for managing teacher migration in Southern Africa-2012

Migration Experts	Education officials	Teacher unionists	School principals	Migrant teachers
Initiate bilateral agreements	Initiate bilateral agreements	Initiate bilateral agreements	Speed-up processing of qualifications, work permits and job contracts	Harmonise teacher qualifications and salaries in region
Harmonise teacher qualifications in region	Create data base of migrant teachers	Harmonise teacher qualifications in region	Assess performance of migrant teachers	Institute orientation and professional development programmes
Create and maintain data base of migrant teachers	Apply CTRP or develop regional protocol	Create and maintain data base of migrant teachers	Engage in targeted recruitment (scarce skills)	Initiate bilateral and multilateral agreements
Apply CTRP or develop regional protocol	Engage in targeted recruitment (scarce skills)	Improve salaries and conditions of service	Improve salaries and conditions of service	Improve salaries and working conditions
Improve teacher retention (salaries and conditions of service)	Speed-up processing of qualifications, work permits and job contracts	Unions to recruit migrant teachers	Initiate teacher exchange programmes	Speed-up processing of qualifications, work permits and job contracts

From Table 6.2 the most significant proposition for managing teacher migration in Southern Africa proffered by the participants, and determined on the basis of its frequency and priority, was to initiate bilateral or multilateral agreements between and among countries, thus implying that countries in Southern Africa should engage in organised and coordinated teacher recruitment. Such agreements would have specific terms agreed upon between the sending and receiving countries and the Commonwealth Teacher Recruitment Protocol (CTRP) or a new protocol for Southern Africa could provide a framework for such multilateral agreements.

The second most significant proposition relates to the harmonisation of teacher qualifications and salaries in Southern Africa, followed by the creation and maintenance of a data base of teacher migration statistics. Improving teacher salaries and conditions of service, in order to ensure teacher retention and to minimise emigration was the fourth most significant proposition proffered by the various categories of participants. This was followed by the proposition for a speedy and effective processing of qualifications, work permits and teaching contracts for migrant teachers. The sixth most significant proposition related to instituting

targeted recruitment of migrant teachers and ensuring that only those foreign educators with scarce skills are recruited by the receiving countries.

6.6 CONCLUSION

In Chapter 6, the results of the qualitative investigation, based on data elicited from the different groups of participant representation, namely migration experts, Ministry of Education officials, teacher union leaders, school principals and migrant teachers, were presented. The results of the qualitative research reflected the views of the participants on the causes and effects of teacher migration in Southern Africa and the interviewees' perspectives on how international teacher migration should be managed in the region.

From the results, three (3) primary causes of teacher migration in Southern Africa were identified as pertaining to economic conditions; teachers' salaries and conditions of service; and political conditions prevailing in sending and receiving countries. It was apparent that poor economic conditions, low salaries and unstable political conditions in sending countries such as Zimbabwe impelled teachers to leave their countries of origin, while better economic conditions, which included higher salaries, and political stability attracted them to the receiving countries, both within and outside Southern Africa. These primary causes of teacher migration were complemented by secondary factors, including an apparent oversupply of teachers in sending countries such as Zambia and teacher shortages in receiving countries such as South Africa. Other conditions which were perceived as drivers of teacher migration in Southern Africa included the migrant teachers' pursuit for further education and better socio-economic opportunities in general.

It was evident that migrant teachers generally made a positive impact on the quality of education in the participating schools and receiving countries, by mitigating teacher shortages and by contributing to an improvement in school results. With regard to the benefit of teacher migration to migrant teachers and their families in Southern Africa, it was clear that migrant teachers had earned an enhanced income which enabled them to send remittances to their countries of origin and acquire assets such as houses. In addition, migrant teachers benefitted from professional development opportunities and further studies, giving them significant potential opportunities in terms of increased earnings and promotion. However, the higher qualifications obtained by migrant teachers appeared not to have any immediate effect,

particularly in terms of promotion, owing to the fact that the majority of the migrant teachers were hired on short-term contracts and, as a result, not eligible for promotion.

Despite its positive effects, teacher migration also had negative effects which pertained mainly to brain drain as a threat to the achievement of national and international targets for education in the sending countries. What was also significant was the emerging phenomenon of migrant teachers who were recruited to teach in low-cost private schools, thus fuelling privatisation of education in Southern Africa, while abusing migrant teachers' rights to standard salaries. Migrant teachers in Southern Africa faced a number of challenges which covered a broad spectrum of hindrances such as struggling to cope with the teaching of a foreign school curriculum to coping with xenophobic threats. Delays in the processing of the qualifications of migrant teachers and the issuing of their work and residence permits and teaching contracts in Southern Africa resulted in de-skilling as migrant teachers resorted to seeking menial jobs such as restaurant attendants and shop assistants, in order to earn an income to survive. De-skilling was also reflected in the under-employment of highly qualified migrant teachers in low-cost private schools. International teacher migration also had a negative impact on the families of migrant teachers who were separated from their families, with children often cared for by extended family members, without the necessary parental guidance and affection.

Finally, the participants proffered a number of propositions concerning the management of teacher migration in Southern Africa. The most significant suggestions included the signing of bilateral and multilateral teacher migration agreements between and among governments, harmonisation of teacher qualifications and salaries, setting and maintaining a comprehensive data base for migrant teachers, improving teacher salaries and conditions of service and speeding up the registration process, including the issuing and renewal of work and residence permits and teaching contracts. This, therefore, implies that these suggestions should be the basis for developing a viable strategy for managing teacher migration in Southern Africa.

In Chapter 7, the conclusions drawn from both the literature review and the empirical investigation will be discussed. The main principles and parameters for managing teacher migration emerging from the findings will be presented, leading to the development of a proposed model for managing teacher migration in Southern Africa. Some recommendations

that can be used to improve the management of teacher migration in Southern Africa are made and proposed areas for further study identified.

CHAPTER 7

RESEARCH FINDINGS, RECOMMENDATIONS AND AREAS FOR FURTHER STUDY

7.1 INTRODUCTION

The aim of this research was to develop a strategy for managing teacher migration in Southern Africa. The main problem investigated in the study is the management of the migration of teachers in Southern Africa in order to balance the rights of teachers to migrate internationally against the need to protect the integrity of national education systems and to prevent the exploitation of the human resources of poor countries. In order to address the problem, the statistical scope of teacher migration in Botswana, South Africa and Zambia was assessed in terms of the number of migrant teachers, their gender, age group, skills level, experience and the subjects most affected. In addition, the research examined the main causes and effects of teacher migration on both the sending and receiving countries, as well as on individual migrant teachers and their families. Furthermore, the research solicited the participants' views on how to manage teacher migration in Southern Africa.

Chapter 1 provided an orientation and conceptual framework for the study by providing background information on teacher migration in Southern Africa and its real and potential impact on the achievement of Education For All (EFA) and the education components of the Millennium Development Goals (MDGs). The problem and sub-problems were stated and the research design and methodology discussed and justified. The main concepts were also clarified and the programme of the study outlined.

In Chapter 2, literature related to the concept of migration, international teacher migration and globalisation from a global perspective was reviewed. Concepts regarding migration were defined and theories of migration namely, the individual model, the structural model, the push-pull model, transnationalism and migration systems theory were discussed. The main international instruments governing migration, including the Commonwealth Teacher Recruitment Protocol (CTRP), the United Nations (UN) International Convention on the Protection of the Rights of All Migrant Workers and Members of their Families (ICRMW) and International Labour Organisation (ILO) Migrant Workers Conventions 97 and 143

were also discussed. In addition the advantages and disadvantages of international labour migration were discussed with a specific focus on cross-border teacher migration. Finally, teacher retention strategies and the implication of these strategies on dealing with brain drain and managing teacher migration in Southern Africa were examined.

In Chapter 3, international labour and teacher migration was discussed from the Southern African perspective. The volumes, causes and effects of cross-border migration and teacher migration in Southern Africa were analysed with a particular focus on Botswana, South Africa and Zambia. The broader context of teacher migration in Africa, as well as the existing legal frameworks and policies for managing teacher migration on the continent and specifically in Southern Africa were examined.

The methodological approaches applied in conducting the empirical study were discussed in Chapter 4. The research design used and the rationale for using combined methods (quantitative and qualitative approaches) were discussed. The population, sampling procedures, data collection techniques, instruments and methods of analysis were described and justified. The principles and ethics that guided the research were also discussed, emphasising the need to obtain voluntary participation and to ensure the participants' anonymity and confidentiality. Furthermore, a critique of the methodological assumptions underlying the study was presented, revealing the researcher's stance concerning the reliability and validity of the study.

In Chapter 5, the findings of the empirical investigation that was based on quantitative data collected through a self-administered questionnaire were discussed. Drawing on quantitative data elicited from Ministry/Department of Education officials, school principals and migrant teachers, the researcher addressed the statistical scope of international teacher migration, as well as its causes, effects and suggested measures for managing teacher migration in Southern Africa.

In Chapter 6, the qualitative research findings of the empirical investigation, that supplemented the quantitative research findings, were presented. Data from the in-depth interviews conducted with individual teacher migration experts, Ministry/Department of Education officials, teacher union leaders, school principals and migrant teachers were analysed, and each category of the causes, effects and management of teacher migration in

Southern Africa was presented. Data from the qualitative investigation complemented the quantitative study, thus contributing to a deeper understanding of the teacher migration phenomenon in Southern Africa.

In this final chapter (Chapter 7), the integrated research findings, conclusions, recommendations and suggested areas for further study are discussed. A summary of the main findings and conclusions from both the literature review and the empirical study is presented. In line with the research question and sub-questions, the researcher identifies the parameters and essential features of a strategy for the viable management of teacher migration in Southern Africa, and goes on to propose a model for teacher migration that is informed by the research findings. Furthermore, the chapter provides recommendations for consideration by policy makers, education planners, school principals and other stakeholders. Finally, the chapter provides recommendations for further study.

7.2 SUMMARY OF THE MAIN RESEARCH FINDINGS AND CONCLUSIONS

In this section, the research findings and conclusions from the literature review and the empirical study are presented separately, starting with the findings from the literature review. The findings are presented following the research sub-questions, starting with the statistical scope of teacher migration in Southern Africa, followed by the causes and effects of teacher migration in the region. The summary of the research findings also includes actions for managing teacher migration in Southern Africa suggested by the research participants and those deduced from the study's findings.

7.2.1 Results and conclusions from the literature review

First, the results from the literature review revealed that international labour and teacher migration is linked to globalisation and, therefore, is here to stay. The implication is that any attempt to stop international migration may be futile. The only viable option would be to try to manage international migration in such a manner that both sending and receiving countries, as well as individual migrants, benefit from the phenomenon (see Section 2.3.2).

Secondly, findings from the literature review showed that migration statistics, including data on international teacher migration were patchy and incomplete (see Section 2.4). As a result, it was not possible to establish the number of migrant teachers globally or in Southern Africa from the literature review. In view of the above, it would be important for countries and international organisations such as the International Organisation for Migration (IOM) and UNESCO Institute for Statistics (UIS) to compile and disseminate more comprehensive and reliable data on international migration and teacher migration, in particular.

Thirdly, despite the shortage of complete migration data, estimates by the United Nations (UN) show that the number of people and workers living in a country other than their country of birth continues to increase every year and is projected to accelerate in the coming years. For example, the number of international migrants rose from 175 million in 2005 to 214 million in 2010, representing a 22.3 percentage increase within a period of five years (see Section 2.4). International migrants constitute 3% of the world's population (see Section 2.4). Southern Africa has been affected by both outward and inward international teacher migration, with most of the teachers leaving the region going to such developed countries as the United Kingdom, the United States of America, Australia, New Zealand and the Gulf States. Intra-regional migration (South-to-South migration) is also common, with Botswana, South Africa and Namibia being the main destination or receiving countries. The main sending countries include Zimbabwe and Zambia owing to their relatively weaker economies compared to the receiving countries stated above (see Sections 2.4, 3.3.2 and 3.33).

Furthermore, the literature review unearthed various models used to explain the 'what', 'why' and 'how' of the migration phenomenon. These models include the individual model, the historical-structural approach, the push-pull model, transnationalism and networks theory and the migration systems theory. The individual model is based on rational decisions made by individuals to migrate. The historical-structural approach is based on the premise that international migration is caused by historical or structural factors such as the uneven distribution of economic and political power. The push-pull model is based on the premise that international migration is caused by push factors in sending countries and pull factors in receiving countries. Transnationalism and networks theory asserts that migrants establish and maintain transnational links and networks with relatives and friends in their country of origin (see Section 2.5). The migration systems theory combines the various aspects of the other models in order to minimise the weaknesses of each of the other models (see Section 2.5.5).

Of all these different models used to investigate and contemplate the migration phenomenon, the push-pull model is considered one of the most commonly known models to understand human migration (see Section 2.5.3). These general models of migration informed the subsequent empirical study and guided the researcher in developing a specific model for managing teacher migration in Southern Africa.

In addition, results from the literature review showed that many countries have not ratified or fully implemented international norms and instruments governing migration, including international labour migration and the cross-border movement of teachers. In this regard, only forty-one (41) states have ratified the United Nations (UN) International Convention on the Protection of the Rights of All Migrant Workers and Members of their Families (ICRMW) with no major immigration country included in this number (see Section 2.6.1). With regard to the countries included in the empirical study of this thesis (Botswana, South Africa and Zambia), none of them had ratified the ICRMW (see Section 2.6.1). Zambia is the only country participating in this research to ratify the International Labour Organisation (ILO) Migration for Employment Convention 97, which contains provisions that guarantee the rights of migrant workers, including teachers (see Section 2.6.4). Only seven countries out of the 15 members of the Southern African Development Community (SADC), namely, Lesotho, Mozambique, Namibia, South Africa, Swaziland, Zambia and Zimbabwe have signed SADC's Draft Facilitation of Movement Protocol (see Section 3.3.1). In addition, by the end of 2009 none of the countries participating in the study had fully implemented the provisions of the Commonwealth Teacher Recruitment Protocol (see Section 2.6.6). In view of the foregoing, one of the key responses to the international teacher migration phenomenon ought to be the ratification and full implementation of international migration norms and instruments. With regard to teacher migration, for example, teacher unions and civil society organisations may campaign for the ratification and implementation of the UN International Convention on the Protection of the Rights of All Migrant Workers and Members of their Families (ICRMW), the ILO Migrant Workers Conventions 97 and 143 and the Commonwealth Teacher Recruitment Protocol (CTRP).

Results from the analysis of the literature on the benefits and costs or disadvantages of international labour migration revealed that international labour migration had significant economic and other benefits to both sending and receiving countries. Having traced the evolution of international migration, there is a notable gradual shift from viewing

international migration, particularly that of the highly skilled, as a problem or brain drain, to regarding it as a mobility system that can benefit both sending and receiving countries (see Sections, 2.2.3, 2.2.4, 2.2.5, 2.3.2 and 3.3.1). Increasingly, emphasis is put on the migration-development nexus and on a rights-based approach meant to guarantee the rights of migrant workers and their families (see Section 2.6.3).

Another important finding from the literature review was that the main push and pull factors influencing international labour and teacher migration were politically and socially related, including poor socio-economic conditions, low wages, high levels of unemployment, poverty and lack of opportunity with regard to career progression. Similarly, findings related to teacher retention showed that the main reasons for teacher emigration from Southern Africa and individual countries within the region were mainly connected to low salaries and poor conditions of service, including poor housing (see Sections 3.2.2, 3.3.3, 3.3.5, 3.3.6 and 3.3.7). This implies that it is possible for countries to devise successful policies for managing and retaining their highly skilled and experienced teachers by analysing and addressing the main reasons for emigration or push factors. For example, improving teachers' salaries and their conditions of service and promoting return and circular migration policies may yield positive results.

Finally, an analysis of the literature revealed that Southern Africa's response to the migration phenomenon and teacher migration has been sluggish. The Southern African Development Community (SADC) does not have a specific protocol on teacher migration and mobility, while the Draft Protocol on the Facilitation of Movement of Persons in the Southern African Development Community is yet to be signed by the required number of SADC member states for it to become operational. In addition, the African Union (AU) has not yet finalised its teacher recruitment protocol (see Section 3.3.1).

7.2.2 Results and conclusions from the empirical study

Results from the empirical study provided pertinent insights into the teacher migration phenomenon in Southern Africa, revealing the following ten major themes:

- The scarcity and incompleteness of teacher migration data

- The profile of migrant teachers in Southern Africa
- The subjects taught by migrant teachers
- Push and pull factors of teacher migration in Southern Africa
- The positive contribution of migrant teachers to the education systems of receiving countries
- The positive and negative impact of teacher migration on migrant teachers and their families
- The teacher migration paradox
- Migrant teachers' return and rehire possibilities
- The bureaucratic nature of migrant teachers' recruitment and registration processes
- Effective strategies for managing teacher migration

7.2.2.1 The scarcity and incompleteness of teacher migration data

Teacher migration data were scarce and incomplete, confirming literature review findings (see Section 7.2.1). For example, the Ministries/Departments of Education in the three participating countries (Botswana, South Africa and Zambia) reported not having data on teacher emigration, while the representative of the Ministry of Education in Zambia was hesitant to participate, citing lack of adequate data on both outward and inward teacher migration. Lack of adequate teacher migration data would make it difficult for governments in Southern Africa to plan and manage teacher migration effectively, hence the need to develop an effective and comprehensive teacher migration data management system in the region.

However, despite the scarcity and incompleteness of teacher migration data in the Southern African region, the available data showed that in 2011 Botswana had 336 migrant teachers, constituting 2.6% of the secondary school teaching force of 13 169. In 2010, the Limpopo Province of South Africa had 1 160 migrant teachers, amounting to 4.6% of the secondary school teaching force of 24 980 (see Section 5.4.1). Zimbabwe was the major source country in the researched region, and the majority (56.7%) of the migrant teachers who participated in this study were Zimbabwean, thus confirming Zimbabwe as a major sending country in the Southern African region (see Section 5.4.2). This implies that any viable strategy for

managing teacher migration in Southern Africa should take Zimbabwe, as a major source country, into account.

7.2.2.2 The profile of migrant teachers in Southern Africa

The majority of the migrant teachers were male (see Section 5.4.1). In 2011, male migrant teachers constituted 70% of all migrant teachers in Botswana, while in the Limpopo Province of South Africa the percentage of male migrant teachers in the same year was 60%. Male migrant teachers constituted 80% of the participants in this study (see Figure 5.3). However, it should be noted that by 2012, the proportion of female migrant teachers in South Africa's Limpopo Province had grown to 50% (see Section 5.4.1). Although it was not possible to obtain comparable figures for 2012 from Botswana, based on the Limpopo figures, the significant proportion of female migrant teachers in Southern Africa is a compelling case for investigating the gender dimensions of teacher migration in the Southern African region.

The majority (33%) of the migrant teachers who participated in the study were aged 35-44, followed by those in the age range, 45-54 (26.7%) and 25-34 (23%). Fifty-six (56%) of the migrant teachers who participated in the empirical study were in the age range 25-44 years, thus, suggesting that most foreign educators in Southern Africa are below middle-age (see Section 5.4.2). Migrant teachers from Zimbabwe were, however, generally younger than foreign educators from other countries, with 41.2% of them falling within the age range 25-34, 54.9% within the 35-44 age range, while only 5.9% fell within the 45-54 age range. By comparison, all three migrant teachers from India (the country with the second highest number of migrant teachers participating in the study) were aged 55 or above (see Section 5.4.2). In terms of the highest professional qualifications, the majority of the migrant teachers (43%) who participated in the study had a Bachelor's degree in education or equivalent, followed by a diploma or non-degree equivalent (33%) and a Master's degree or equivalent (17%). Although none of the participants had a PhD or equivalent, bachelor and masters holders constituted 60% of the participants, thus indicating that the majority of the migrant teachers who participated in the study were highly qualified (see Section 5.4.2). Notably, the majority of the migrant teachers who participated in the study did not have many years of teaching experience before emigrating (see Figure 5.6), with more than half (52.9%) of the seventeen (17) migrant teachers from Zimbabwe having between zero (0) and five (5) years of teaching experience before they emigrated. If the characteristics of migrant teachers

reflected in the sample of this study is an indication of the whole migrant teacher population of Southern Africa, the implication is that the profile of migrant teachers in Southern Africa typically represents highly qualified males. Though generally highly qualified, Zimbabwean migrant teachers were fairly young and with limited teaching experience. They tended to have five or less years of teaching experience, thus implying that the majority of them tend to emigrate soon after graduating from college. Introducing and effectively implementing bonding, by ensuring that newly-qualified Zimbabwean teachers are obliged to work for a period equivalent to the duration of their training, coupled with effective teacher retention strategies such as improving teacher salaries and safety should contribute to a counteraction of the level of outward teacher migration from Zimbabwe.

7.2.2.3 The subjects taught by migrant teachers

The majority of the migrant teachers who participated in this study on teacher migration in Southern Africa taught subjects in the humanities (17%) and languages (17%), followed by business studies (13%), information and communication technology (ICT) (13%), mathematics (13%) and natural sciences (13%) (see Section 5.4.2). The implication is that in Southern Africa, it is not only teachers teaching in the natural science-oriented subjects (mathematics and science teachers) who migrate, as is often the assumption, but business studies, humanities and language teachers as well. However, the proportion of mathematics and science teachers was relatively high among the migrant teachers who participated in the research, thus suggesting that a significant number of special subject teachers migrate in Southern Africa. Even then, it is clear that, in Southern Africa, teacher migration is not confined to specialist subject areas only owing to the relative shortage of well-qualified teachers experienced in all subject areas.

7.2.2.4 Push and pull factors of teacher migration

The main determinants and causes of teacher migration in Southern Africa were, primarily, the general state of the economy and political situation in individual countries, followed closely by salary differentials between countries and the quality of conditions of service (see Sections 5.5 and 6.3). Although they are key determinants for migration decisions, general economic and political conditions in a country tend to be intractable structural or environmental factors, quite often beyond the purview of easily 'manageable' components of

the teacher migration phenomenon. Nevertheless, the significance of these factors remains paramount and appropriate interventions within the broader economic and political governance system at national or regional level may help improve the management of teacher migration in Southern Africa.

7.2.2.5 The positive contribution of migrant teachers to the education systems of receiving countries

Migrant teachers had made a positive impact on the quality of education in the participating schools and countries in Southern Africa by mitigating teacher shortages, especially with regard to subjects taught in the humanities and languages, but also with regard to mathematics, science, business studies and information and communication technology (ICT) (see Section 5.4.2). Migrant teachers were reported to have brought new skills, expertise, teaching methodologies and experience, with some of the principals noting an improvement in school results arising from the contribution of migrant teachers (see Sections 5.6, 6.4.3 and 6.4.4).

7.2.2.6 The positive and negative impact of teacher migration on migrant teachers and their families

The findings show that the impact of teacher migration on migrant teachers and their families in Southern Africa was perceived to be mixed by all categories of respondents and participants. On a positive note, many migrant teachers reported that they had established new networks, gained a new cultural experience and earned higher income, enabling them to acquire properties and support their families still residing in their country of origin (see Sections 5.6 and 6.4.5). Some of the migrant teachers indicated that they had engaged in further study, acquiring higher qualifications and enhancing their income and promotion prospects (see Section 6.4.5). However, the impact of teacher migration on migrant teachers was also considered to be negative, with many participants, including the migrant teacher participants reporting widespread discrimination and xenophobia (see Section 6.4.5). Considering both the positive and negative aspects, the impact of teacher migration on the family fabric was generally perceived to be negative, with several migrant teachers reporting that they felt isolated and homesick. Children were often forced to stay with extended families, without the requisite parental care and guidance.

7.2.2.7 The teacher migration paradox

As already alluded to in Section 7.2.2.5, migrant teachers were generally valued for their contributions with regard to implementing improved teaching methods, experience and expertise to the host countries in the region. The valuable contribution of migrant teachers was particularly strongly emphasised by school principal participants, Ministry of Education officials and teacher union representatives, who revealed that migrant teachers were generally more committed to the curricular programme of the school than local educators and in general available to assist with the extracurricular activities of the school (see Sections 6.4.2, 6.4.3 and 6.4.4). In spite of their positive contributions to the teaching profession, however, the results of the research also showed that migrant teachers were very often discriminated against by the receiving country's Ministry/Department of Education and school authorities, the migrant teachers' new colleagues, and the receiving communities in general. In addition, the migrant teachers were often subjected to xenophobic threats and attacks, which made them feel generally less valued, unwelcome, marginalised and left with little self-esteem (see Section 6.4.5). This was exacerbated by a lack of knowledge of local languages and local customs which impacted negatively on the level and degree of integration. In this regard, the researcher refers to the apparent 'love-and-hate' attitude towards migrant teachers by local inhabitants as the teacher migration paradox. The teacher migration paradox is a migration puzzle that needs to be solved. An important aspect of the migration puzzle is that migrant teachers from developed countries are often not subjected to the same levels of discrimination as those from countries in the Southern African region, thus suggesting that citizens of Southern African countries have little regional consciousness and a low level of tolerance for migrant teachers from fellow African countries, thus fellow developing countries (see Section 6.4.5). It is important to translate the perceived value brought by migrant teachers to receiving schools, communities and education systems into a welcoming attitude and acceptance of foreign educators regardless of the developed or developing status position of the foreign teachers' countries of origins. Effective integration measures, local language training, and participation in community projects should be instituted, coupled with awareness-raising initiatives, which should be led by the receiving countries' school authorities, their Ministry/Department of Education, their teacher unions and other stakeholders such as their parent communities, which may reduce discrimination against migrant teachers.

7.2.2.8 Migrant teachers' return and rehire possibilities

Returning teachers were not always rehired in their countries of origin, thus resulting in destitution and a loss of skills. In the case of Zambia, this was partly attributed to the high number of unemployed graduate teachers in the country and the fact that some of the teachers had left without following the appropriate procedures for resignation (see Section 6.4.2). None of the three countries studied (Botswana, South Africa and Zambia) had a clear policy on return or a deliberate programme to encourage the educators who had emigrated to return and continue teaching in local schools. Returning teachers usually possess additional skills, and increased expertise and experience, thus failure to rehire them systematically upon return results in a serious wasting of valuable competencies. Re-engaging returning teachers should, therefore, be considered as an important brain gain strategy to pursue in Southern Africa so as to mitigate teacher shortages where they exist and to contribute to the continuous pursuit of improved quality of teaching and learning.

7.2.2.9 The bureaucratic nature of migrant teachers' recruitment and registration processes

The recruitment and registration process of migrant teachers was bureaucratic and characterised by several layers of unnecessary parallel processes causing unconstructive delays. The short-term nature of the migrant teachers' contracts, ranging from a few months to three (3) years, was perceived to be problematic, particularly by the migrant teachers, owing to the difficulties related to the renewing of the contracts and the negative impact of these short-term contracts on promotion opportunities and general job security (see Sections 6.4.4 and 6.4.5). In fact, the employment conditions of migrant teachers did not generally meet the fundamental provision of the Commonwealth Teacher Recruitment Protocol (CTRP), which states that migrant teachers shall enjoy employment conditions not less than those of local educators with similar status and occupying similar positions (see Section 6.5.1). School principals generally considered the short-term nature of migrant teachers' contracts and the duration of time taken to renew these contracts to be disruptive to teaching and learning in the school and, therefore, preferred the appointment of staff with the possibility of long-term or permanent contracts which enhances teacher retention (see Section 6.5.4).

7.2.2.10 Effective strategies for managing teacher migration

Several strategies were proffered by the respondents and participants concerning the effective management of teacher migration in Southern Africa (see Table 6.2). The most significant proposition for managing teacher migration in Southern Africa was through bilateral agreements between countries, thus implying that countries in Southern Africa should engage in organised teacher recruitment. Such bilateral agreements would have specific terms agreed between the sending and receiving countries and the Commonwealth Teacher Recruitment Protocol (CTRP), or a new teacher migration protocol for Southern Africa should be developed to provide a framework for such agreements. Improving salaries and conditions of service in order to ensure teacher retention and minimise emigration was another significant strategy proposed by the participants. In addition, strategies pertaining to the harmonisation of teacher qualifications and salaries across the Southern African Development Community (SADC) region, the setting up of an up-to-date and well-maintained database of migrant teachers, and the efficient processing of work permits and contracts of migrant teachers were also considered significant measures for managing teacher migration effectively.

7.3 PARAMETERS AND FEATURES OF A STRATEGY FOR MANAGING TEACHER MIGRATION IN SOUTHERN AFRICA

A number of parameters and features for managing teacher migration in Southern Africa viably can be deduced from the findings discussed in Section 7.2.2. The findings point to seven (7) core principles which are discussed next.

7.3.1 Comprehensive teacher migration data

Effective educational planning, including the management of teacher migration should be informed and supported by the continuous collection of empirical data to serve as a strong evidence base for decisions on teacher migration policy and practice. Detailed data on both inward and outward teacher migration are of paramount importance. Teacher migration data should be disaggregated by such indicators as age, gender, the levels of education and the subjects most affected to facilitate effective management of teacher supply and demand, including teacher migration. Detailed accurate data can help the Ministry/Department of Education authorities, school principals and other policy makers to make accurate teacher

supply and demand projections and appropriately respond to school and teacher needs, thereby avoiding unnecessary disruptions to teaching and learning.

7.3.2 A clear national policy, legal framework and coordinated implementation

A clear policy on teacher migration and mobility, informed by international migration instruments and good practice, and backed by domestic legislation is essential. Coordinated action involving various Government Ministries or Departments such as the Ministry/Department of Home Affairs and Education and agencies responsible for assessing and accrediting the qualifications of foreign educators is important to ensure effective management of teacher migration.

7.3.3 A clear regional teacher migration and mobility policy with enabling instruments for implementation

An effective teacher migration strategy for Southern Africa should be guided by a clear regional teacher migration policy and an enabling instrument consisting of a teacher recruitment and mobility protocol or convention. The Southern African Development Community (SADC) can take the lead in developing and coordinating the implementation of a teacher migration and mobility policy for the region. A specific protocol or convention on teacher migration and mobility in Southern Africa, supported by the majority of the countries in the SADC, including the major sending and receiving countries, can provide the enabling instrument for managing teacher migration in the region. A convention is preferred since it carries legal force in the countries that have ratified it, while a protocol only depends on moral or persuasive force.

7.3.4 Organised teacher recruitment, bilateral and multilateral agreements

Organised recruitment, based on bilateral and multilateral agreements between and among countries in Southern Africa, is an important prerequisite for managing teacher migration viably. Such bilateral and multilateral agreements do not exist presently and teacher migration is generally haphazard, with migrant teachers mainly depending on relatives and friends for information and assistance. The role of recruitment agencies in an organised recruitment dispensation has not been fully explored and documented. Bilateral and

multilateral agreements, based on international and regional migration norms and instruments, can include the obligations of sending and receiving countries, of employers, and of individual migrant teachers and the benefits accruing to each of these categories. Bilateral and multilateral agreements can also include clauses on the provision of information and orientation programmes for migrant teachers with regard to all the important aspects pertaining to migration, including relocation expenses, the recognition of qualifications, school curricula, salaries and conditions of service of migrant teachers and re-engagement arrangements upon return to the country of origin. To that end, organised recruitment and bilateral and multilateral agreements may significantly improve the management of teacher migration in Southern Africa and ensure the protection of the rights of migrant teachers and those of vulnerable countries whose valuable human resources are ‘poached’ without their involvement. Furthermore, organised recruitment will ensure that Southern African countries with excess numbers of qualified secondary school teachers like Zambia can help alleviate teacher shortages in other Southern African countries, while at the same time providing employment to unemployed qualified teachers.

7.3.5 Guaranteeing the rights of migrant teachers and their families

Promoting the rights of migrant teachers and their families should be an essential feature of a strategy for managing teacher migration viably in the Southern African region. Ensuring that migrant teachers have the same conditions of service as local educators, facilitating migrant teachers’ relocation and helping them with relocation expenses, instituting orientation and integration programmes and staff development can all contribute significantly towards improving the well-being of migrant teachers in Southern Africa. Teacher unions can help defend and promote the rights of migrant teachers by facilitating migrant teachers’ rights and engaging public authorities on migrant teachers’ behalf. Therefore, easy access to teacher union membership and programmes is an important precondition for the protection of migrant teachers’ rights.

7.3.6 Improving teacher retention and managing teacher supply and demand

Diminishing push factors in sending countries by improving the attractiveness of teaching as a profession can contribute to teacher retention. Both sending and receiving countries should

improve the management of teacher supply and demand, ensuring that teacher education institutions produce adequate numbers of qualified secondary school teachers to meet local demand. Long-term teacher work force planning based on well-thought out, systematic and budgeted teacher policies and programmes is thus of paramount importance to both sending and receiving countries.

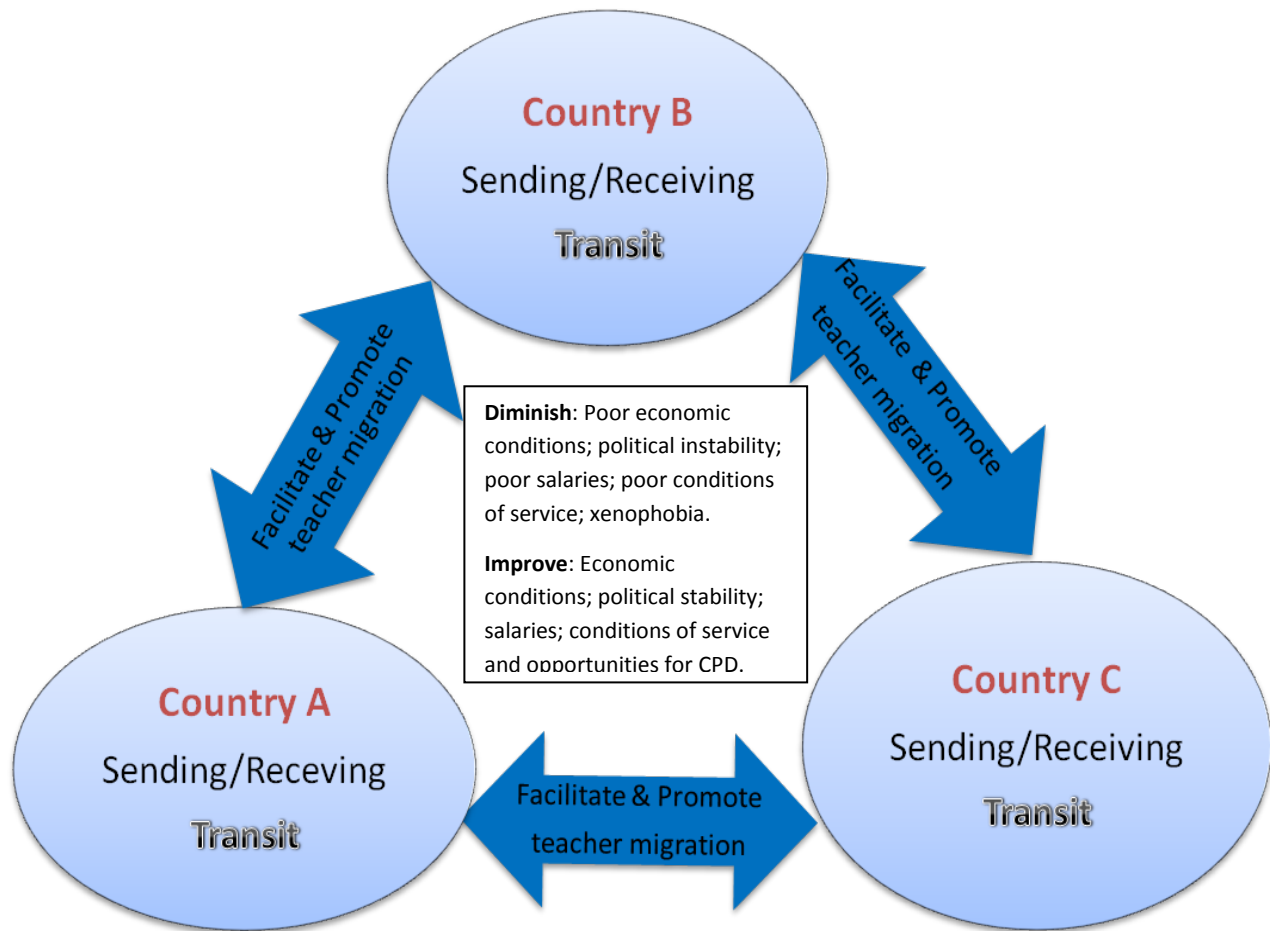
7.3.7 Harmonisation of teacher qualifications and salaries

Harmonisation of teacher qualifications in Southern Africa should be an essential feature of a strategy for managing teacher migration in the region constructively. For such calibrating initiatives to become a reality, the countries in the region must establish minimum standards for the teaching profession. The development of such standards should be led by the Southern African Development Community (SADC) and involve teachers through their representative organisations.

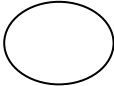
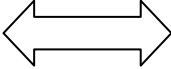

7.4 A PROPOSED MODEL FOR MANAGING TEACHER MIGRATION IN SOUTHERN AFRICA

The aim of this research was to develop a strategy for managing teacher migration in Southern Africa. Following the findings from both the literature review and the empirical study (see Sections 7.2.1 and 7.2.2), and the parameters and features of a strategy for managing teacher migration in Southern Africa viably (see Section 7.3), a model for the optimal management of teacher migration in Southern Africa is proposed (Figure 7.1).

Figure 7.1: A model for the optimal management of teacher migration in Southern Africa



Key to Figure 7.1

-  Sending and receiving countries
-  Direction of migration flows (inward and outward teacher migration)
-  Actions to improve teacher migration
- CPD Continuing Professional Development

With reference to the schematic presentation of the model for an optimal management of teacher migration in Southern Africa (Figure 7.1), the circles in the diagram indicate the sending and receiving countries in the study. There is evidence to show that the countries may be both receiving and sending countries, and to a lesser extent, transit countries, hence the double arrow, which explains this. In order for teachers to migrate from one country to

another, there are push factors in sending countries, forcing them to emigrate and pull factors in receiving countries luring them to migrate.

The major premise of the model for teacher migration is that the most viable way of managing teacher migration in Southern Africa is to facilitate the free movement of teachers from one country to another (expressed as countries A, B and C in the model). Promoting the free movement of teachers, including circular migration where people move onto a second country, means each sending country would become a receiving country (and possibly a transit country) at the same time or at one time or another. The model also shows the need to promote return migration (represented by the arrows between countries) in order to ensure that teachers who emigrated return with additional skills, expertise and improve teaching experience. For such pedagogical repertoire to benefit the new destination country (which may be the migrant teacher's original home country or former destination country), public authorities must ensure that returning educators are recruited back into the education system.

Free movement of teachers in Southern Africa can be facilitated by removing all the major barriers militating against mobility, such as stringent visa requirements and delays in the processing of work permits and accreditation of qualifications. Diminishing negative environmental conditions or push factors such as poor economic conditions in the country, political instability and poor salaries and conditions of service is an important element of the model. Similarly, improving economic conditions and political stability, as well as harmonising teacher qualifications, salaries and conditions of service, as well as providing opportunities for professional development and further education for teachers, are essential in facilitating teacher mobility and promoting return migration in the region.

Promoting circular teacher migration within the region will ensure that all countries in Southern Africa benefit from the skills of teachers in the region and that those countries with excess teachers such as Zambia can 'export' their teachers to other countries in the region. Promoting teacher mobility in Southern Africa will help retain African teachers within the region and reduce brain drain or teacher emigration to countries outside the region. This will be a benefit and win-win situation for all the countries in Southern Africa. The model assumes that there will eventually be free mobility of teachers in the region, reciprocity in the recognition and harmonisation of teacher qualifications and experience as well as re-integration of teachers on retention.

One of the major strengths of the model is that it is flexible and adaptable, enabling the user to add as many countries as possible. The model can, therefore, be used in the entire Southern African Community (SADC) region and the African sub-continent.

7.5 RECOMMENDATIONS

In this section, the researcher makes some recommendations that can be applied to improve the management of teacher migration in Southern Africa. The following recommendations are informed by the main results of the study.

- i) Recognising that the three countries which participated in this study (Botswana, South Africa and Zambia) have not yet ratified the three major international migration instruments (the United Nations International Convention on the Protection of the Rights of All Migrant Workers and Members of their Families and the International Labour Organisation Migrant Workers Conventions 97 and 143), with the exception of Zambia which has ratified ILO Convention 97), it is recommended that Southern African countries should ratify and implement these conventions. To that effect, Southern African countries should attach their signatures to the above instruments and incorporate the provisions of these instruments into domestic legislation. Teacher unions and civil society organisations dealing with migration issues can help monitor the implementation of the above instruments. Teacher unions can do this more effectively by using the ILO supervisory mechanism and report violations of the provisions of Migrant Conventions by national Governments to the ILO Governing Body and General Conference held every year. The partners can take advantage of the International Migrants Day, commemorated on 18 December every year since 2000 to raise awareness of the need for countries to ratify international migration instruments.
- ii) Taking into account the scarcity and paucity of teacher migration data, Southern African countries should develop and maintain comprehensive teacher migration databases. Such comprehensive data may include the number of international teacher migrants in all teaching levels (early childhood, primary, secondary and post-secondary) and forms of education (formal and non-formal, public and private) disaggregated by gender, age, country of origin and other essential dimensions. It is

also important to capture the number of emigrating teachers and monitor teacher migration trends in order to improve educational planning and the management of teacher migration at national level and beyond. In addition, the United Nations Educational, Scientific and Cultural Organisation (UNESCO) Institute for Statistics (UIS) should collect and publish teacher migration data every year as part of its annual publication on education indicators, the *Global Education Digest*. Similarly, the *Education for All (EFA) Global Monitoring Report*, published annually by an independent Report Team under the auspices of UNESCO, should also include data on teacher migration and mobility and assess the teacher migration phenomenon's impact on the achievement of international targets for education.

- iii) Noting that the African Union (AU) has not yet finalised its teacher recruitment protocol, the non-ratification of the Draft Protocol on the Facilitation of Movement of Persons in the Southern African Development Community, and the absence of a teacher migration protocol in Southern Africa, it is recommended that the Southern African Development Community (SADC) should develop and implement a teacher migration and mobility protocol or convention. Such a protocol or convention should be developed through an inclusive process involving governments, educators through their representative organisations, United Nations (UN) agencies, and other organisations dealing with teacher migration and other relevant key stakeholders in the region. The Commonwealth Teacher Recruitment Protocol (CTRP) and the United Nations and ILO Migrant Workers Conventions may inform the SADC protocol or convention. Ideally, a convention would be preferred since it has legal force, compared to a protocol, which carries only moral or persuasive force.
- iv) Taking into account the significance of general economic and political conditions as drivers of teacher migration in Southern Africa, it is recommended that governments, both individually and collectively, improve the economic and political situation in the region. The Southern African Development Community (SADC) should vigorously pursue its objective to achieve better economic integration and strengthen its role in maintaining political stability in Southern Africa and all its member states. Promoting values of democracy, peace, tolerance and harmony in the region, including education for good citizenship, may help achieve and maintain political stability. In addition, Governments, the Southern African Development Community (SADC), the United

Nations (UN) system and the international community should protect teachers from political violence and declare schools safe havens. Such actions may help reduce the impact of the political (and economic) push factors and ‘forced’ migration arising from these factors. Teacher unions and civil society should speak up when teachers are attacked and defend their rights, safety and security.

- v) Recognising the importance of salaries and conditions of service as drivers of cross-border teacher migration in Southern Africa, Governments in the Southern African region should improve teachers’ salaries and conditions of work in line with the cost of living and regional trends. Furthermore, Southern African Governments should introduce and implement teacher retention schemes and incentives, in consultation with teachers through their representative organisations. Examples of teacher retention measures may include monetary incentives for teaching in rural and remote areas, housing for teachers, special allowances for teachers with scarce skills, professional development programmes and opportunities for further study. Computerisation of the education system and providing every teacher with a tablet computer should also be considered as important retention measures of a knowledge-based society. Teacher salaries and allowances should be paid regularly and timely. Improving teachers’ conditions of service would not only help retain teachers, but also improve teacher motivation, leading to effective teaching and learning.

- vi) Cognisant of the erratic recruitment of returning teachers in Southern Africa and the brain waste caused by failure by public authorities to rehire returning teachers, it is recommended that Governments develop and implement a systematic plan to encourage the return and ensure the recruitment of returning teachers. Such measures will ensure that the additional skills, experience and expertise of returning teachers are used to develop local education systems. Provisions for the return and re-engagement of returnees should be part of bilateral and multilateral agreements signed between and among governments.

- vii) Recognising the significant emigration of teachers from Southern Africa to Western countries, the Gulf States and other countries outside the region against the background of sentiments desiring to retain these skills within the region, it is recommended that Southern African Governments and international organisations

promote intra-regional (circular) migration. The Southern African Development Community (SADC) should lead and coordinate the implementation of a circular migration programme in the region. To achieve circular migration, Southern African Governments should harmonise teaching standards, teacher qualifications and salaries and remove barriers to teacher mobility in the region.

- viii) Noting the reported widespread discrimination practices and xenophobic threats against migrant teachers in Southern Africa and the challenges related to integration in receiving countries in the region, it is recommended that Governments and schools of receiving countries devise effective orientation, integration and support programmes for migrant teachers. A crucial aspect of such integration programmes should require governments of receiving countries to institute language support programmes for migrant teachers and their families.
- ix) Observing the delays experienced in processing residence and work permits in the receiving countries in Southern Africa, it is recommended that Southern African Governments rationalise the registration process by reducing the number of layers and the period taken to process foreign qualifications, residence and work permits and teaching contracts. Where possible, governments should have one institution in charge of the entire registration process. Better coordination among Government Ministries/Departments and agencies in charge of various aspects of registration is paramount. To promote teacher retention and stability in school staffing, Southern African Governments should issue long-term or permanent teaching contracts to migrant teachers. In addition to assessing qualifications, the registration process should include a thorough check of the migrant teachers' background to avoid employing foreign educators who may have committed crimes, particularly against children and young people.

7.6 SUGGESTED AREAS FOR FURTHER STUDY

There is a general shortage of research on teacher migration in Southern Africa. Therefore, more research, both quantitative and qualitative, is required to expand the pool of evidence to enable governments, international and regional migration organisations, other policy makers

and stakeholders to respond better to the teacher migration phenomenon in the region. Some key areas suggested for further study, arising from the findings of this thesis are given below.

One of the key issues that emerged from this study is that the working conditions of migrant teachers in low cost private schools are generally inferior to the conditions of migrant teachers in public schools. This was revealed by the desire of many migrant teachers working in low- cost private schools to move to public schools. However, this study was unable to establish the actual working conditions of migrant teachers in low cost private schools. It would, therefore, be important to assess the conditions of migrant teachers in low-cost private schools in the three countries, which participated in this study (Botswana, South Africa and Zambia) and beyond. A further study in this area may analyse, compare and contrast salaries and the general conditions of service, including pension and social security provisions in private and public schools. The study may also assess professional development opportunities and the existence or lack of a grievance procedure for migrant teachers in the low-cost private school subsector.

Another key area for further study is the role of recruitment agencies and their practices. A number of migrant teachers who participated in the study reported that they had been recruited by a placement agency, which charged an unreasonably high service fee. It would, therefore, be important to analyse the practices of recruitment agencies and their relationship with employers in both the public and private school sectors. A study of recruitment agencies may also focus on the regulatory framework governing the operations of these agencies and the extent to which the regulations (if in existence) are enforced.

In addition, further studies can explore existing data systems used to capture teacher migration data and how these could be used to improve the management of teacher migration in Southern Africa and beyond. This is particularly important taking into account that none of the countries which participated in this study (Botswana, South Africa and Zambia) had comprehensive Education Information Management Systems (EMIS) with full migration data. For example, none of the countries knew how many teachers had emigrated, or the proportion of teacher attrition due to teacher migration. A further study in this area would help to inform the setting up of comprehensive teacher migration data management systems.

Furthermore, it would be important to study the gender dimensions of teacher migration in Southern Africa. This study revealed that the majority of migrant teachers in the region were male. It would be important to investigate why there are fewer female migrant teachers in Southern Africa and to identify the specific challenges faced by female migrant teachers and how those challenges could be overcome.

Finally, further research can investigate the impact of teacher migration on the family fabric. Although this study provided a glimpse into the challenges faced by migrant teachers and their families, it would be important to investigate this further, for example, by analysing the impact of international teacher migration on the children of migrant teachers. Collecting both quantitative and qualitative evidence from the children left behind in the sending country and the relatives looking after these children may shed more light on the challenges faced by the children of migrant teachers and how these challenges could be overcome.

7.7 CONCLUSION

This study has shown that teacher migration has become a global phenomenon requiring the attention of policy makers, advocates and activists at global, regional and local levels for viable management. International organisations such as the United Nations (UN) and its agencies or related institutions, notably, the International Labour Organisation (ILO) and the International Organisation for Migration (IOM) have taken considerable steps towards improving the governance of international labour migration by providing international norms, instruments and mechanisms for managing the cross-border movement of people. The UN International Convention on the Protection of the Rights of All Migrant Workers and Members of their Families and ILO Migrant Workers Conventions 97 and 143 are important instruments governing international labour migration globally. Although these instruments do not specifically refer to teacher migration, they cover all migrants, including migrant teachers. However, the main remaining challenge is for these international instruments to be ratified and implemented by most states, including those in Southern Africa.

Africa and Southern Africa's response to the teacher migration phenomenon has not been satisfactory, with the proposed teacher recruitment and mobility protocol for the continent yet to be completed. The Southern African Development Community (SADC) has no specific protocol or convention on teacher migration and mobility, leaving the region without an

effective framework for managing teacher migration. In the final analysis, the management of international teacher migration in Southern Africa remains an unfinished agenda. The teacher migration issues raised in this research, the recommendations offered and the proposed model for managing teacher migration in Southern Africa optimally, apart from keeping the debate on teacher migration alive, contribute to an improvement of the way in which teacher migration is managed in the region. Improving the management of teacher migration in Southern Africa will not only benefit the source and destination countries, the migrant teachers and their families but young people as well through improved teaching resulting in improved learning.

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APPENDICES

APPENDIX A: LETTER TO EDUCATION OFFICIALS REQUESTING PERMISSION TO CONDUCT RESEARCH

Avenue de la Porte de Hal, 13
1060 Brussels
Belgium
Telephone : 003222240679
E-mail : dsinyolo@yahoo.com

The Director-General
Department of Basic Education
222 Struben Street
Pretoria, 2000
Republic of South Africa

4 June 2012

Dear Sir,

Request for permission to conduct research in South African secondary schools

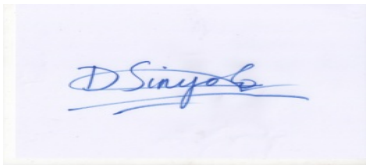
I write this letter kindly seeking the permission of the Department of Basic Education to conduct research in 10 South African secondary schools.

The purpose of the research is to obtain information about teacher migration in your country as part of my doctoral studies at the University of South Africa. The title of my doctoral thesis is *A strategy for Managing Teacher Migration in Southern Africa*.

I intend to collect primary data from migrant teachers and school principals using the attached questionnaire and interview guide. The migrant teachers will be identified using the snowball sampling method and their participation will be voluntary.

The information collected with this instrument will be used solely for academic purposes and the confidentiality and anonymity of the respondents will be assured.

Thanking you in advance for your kind assistance.

A photograph of a handwritten signature in blue ink on a white background. The signature is written in a cursive style and reads "D Sinyolo".

Dennis Sinyolo

Avenue de la Porte de Hal, 13

1060 Brussels

Belgium

Telephone : 00322224067 9

E-mail : dsinyolo@yahoo.com

The Permanent Secretary

Ministry of Education and Skills Development

Private Bag 005

Gaborone

Botswana

4 June 2012

Dear Madam,

Request for permission to conduct research in Botswana secondary schools

I write this letter kindly seeking the permission of the Ministry of Education and Skills Development to conduct research in 10 secondary schools with expatriate teachers in your country.

The purpose of the research is to obtain information about teacher migration in your country as part of my doctoral studies at the University of South Africa. The title of my doctoral thesis is, *A strategy for Managing Teacher Migration in Southern Africa*.

I intend to collect primary data from expatriate/migrant teachers and school principals using the attached questionnaire and interview guide. The migrant teachers will be identified using the snowball sampling method and their participation will be voluntary.

The information collected with this instrument will be used solely for academic purposes and the confidentiality and anonymity of the participants will be assured.

Thanking you in advance for your kind assistance.

A rectangular image showing a handwritten signature in blue ink on a light-colored background. The signature is written in a cursive style and appears to read "D Sinyolo".

Dennis Sinyolo

Avenue de la Porte de Hal, 13

1060 Brusels

Belgium

Telephone : 003222240679

E-mail : dsinyolo@yahoo.com

The Permanent Secretary
Ministry of Education
Ridgeway, Chimanga Road
P.O. Box 50093
Lusaka
Zambia

4 June 2012

Dear Sir,

Request for permission to conduct research in Zambian secondary schools

I write this letter kindly seeking the permission of the Ministry of Education to conduct research in 10 secondary schools with expatriate teachers in your country.

The purpose of the research is to obtain information about teacher migration in your country as part of my doctoral studies at the University of South Africa. The title of my doctoral thesis is, *A strategy for Managing Teacher Migration in Southern Africa*.

I intend to collect primary data from expatriate/migrant teachers and school principals using the attached questionnaire and interview guide. The migrant teachers will be identified using the snowball sampling method and their participation will be voluntary.

The information collected with this instrument will be used solely for academic purposes and the confidentiality and anonymity of the participants will be assured.

Thanking you in advance for your kind assistance.

A rectangular image showing a handwritten signature in blue ink on a light-colored background. The signature is written in a cursive style and appears to read "D Sinyolo".

Dennis Sinyolo

APPENDIX B: LETTER TO SCHOOL PRINCIPALS REQUESTING PERMISSION TO CONDUCT RESEARCH AT THE SITE

Avenue de la Porte de Hal, 13

1060 Brusels

Belgium

Telephone : 003222240679

E-mail : dsinyolo@yahoo.com

The Principal

.....(School)

.....

.....(Address)

4 June 2012

Dear Sir/Madam,

Request for permission to conduct research in your school

I write this letter kindly seeking your permission to conduct research in your school.

The purpose of the research is to obtain information about teacher migration in your country as part of my doctoral studies at the University of South Africa. The title of my doctoral thesis is, *A strategy for Managing Teacher Migration in Southern Africa*.

I kindly request your permission to conduct an interview with you and migrant teachers in your school and for you and the migrant teachers to complete short questionnaires on teacher migration.

The information collected through this study will be used solely for academic purposes and the confidentiality and anonymity of the participants will be assured.

Thanking you in advance for your kind assistance.

A photograph of a handwritten signature in blue ink on a white piece of paper. The signature is written in a cursive style and reads "D Sinyolo".

Dennis Sinyolo

APPENDIX C: INFORMED CONSENT FOR INDIVIDUAL INTERVIEWS

A Strategy for Managing Teacher Migration in Southern Africa

My name is Dennis Sinyolo and I am conducting this research as part of my doctoral studies at the University of South Africa. The aim of the study is to come up with a strategy for analysing, understanding and managing teacher migration in Southern Africa. The study will specifically investigate the statistical scope, causes and impact of teacher migration (both negative and positive) on individual migrant teachers and education systems in the region. Policy recommendations based on the study's findings will be conveyed to policy makers in the region, governments, educational planners and other stakeholders and made available to the participants upon request.

This study is anonymous and the information obtained through the interview or/and the questionnaire will be kept strictly confidential and solely used for the purpose of this research.

You may refuse to answer any of the questions and you may stop participating at any time during the investigation. Your participation is highly appreciated, but entirely voluntary.

Do you have any questions about your participation in this investigation?

.....

.....

Informed Consent

I,,
hereby consent to participate in the investigation on *A Strategy for Managing Teacher Migration in Southern Africa*.

Interviewer/researcher Tel. 00322240679 E-mail: dsinyolo@yahoo.com	Date	Interviewee/participant
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APPENDIX D: MINISTRY OF EDUCATION QUESTIONNAIRE

The purpose of this questionnaire is to obtain information about teacher migration in your country as part of my doctoral studies at the University of South Africa. The title of my doctoral thesis is *A strategy for Managing Teacher Migration in Southern Africa*. The information collected with this instrument will be used solely for academic purposes and the confidentiality and anonymity of the respondent will be assured.

BACKGROUND INFORMATION

Country:.....

Initials of respondent :.....(optional). Position:.....

.....(optional).

SECTION A: NUMBER OF MIGRANT TEACHERS AND SUBJECTS AFFECTED

1. Please, provide the total number of migrant/expatriate teachers at secondary school level in your country, by completing the table below.

Year	Male	Female	Total
2010			
2011			
2012			

2. Please, list in priority order, 4 countries that mostly supply migrant/expatriate secondary school teachers to your country.

i.ii.....

iiiiv.....

3. Which of these subjects do most of the migrant/expatriate teachers teach? Please, indicate the percentage of migrant/expatriate teachers teaching each subject area in the box below.

	Percentage (%) of migrant teachers
Languages	
Mathematics	
Sciences (e.g. chemistry, physics, biology)	
Technological education such as ICT	
Arts	
Humanities and social sciences	
Business studies	
Other, please specify.....	

4. Does your country supply secondary school teachers to other countries?

Yes	
No	
Do not know	

5. If 'yes' to question 4 above, please provide the number of secondary school teachers who have left your country to teach in other countries, by completing the table below.

Year	Male	Female	Total
2010			
2011			
2012			

6. If 'yes' to question 4 above, please, list in priority order, 4 major destination countries for the secondary school teachers who have left your country.
- i. ii.....
- iii.....iv.....

7. Which of the following subjects did most of the secondary teachers who left teach? Please, indicate percentages in the table below.

	Percentage (%) of teachers who left
Languages	
Mathematics	
Sciences (e.g. chemistry, physics, biology)	
Technological education such as ICT	
Arts	
Humanities and social sciences	
Business studies	
Other Please, specify.....	

SECTION B: CAUSES OF TEACHER MIGRATION

8. The following statements describe the reasons why secondary school teachers leave their home countries for other countries. Please, indicate the extent to which each statement characterises your country, by checking the appropriate box.

SD-Strongly Disagree; **D**-Disagree; **A**-Agree; **SA**-Strongly Agree

	SD	D	A	SA
Low salaries and other financial benefits				
Poor economic conditions in the country				
Poor school infrastructure and shortage of teaching and learning resources				
Shortage/lack of housing for teachers				
Lack of professional development opportunities				
Political instability and violence				

Natural disasters				
Other Please, specify.....				

9. If your country has received secondary school teachers from other countries, in your opinion, what are the 3 main reasons why they came to your country?

- i.
- ii.
.....
- iii.
.....

SECTION C: IMPACT AND MANAGEMENT OF TEACHER MIGRATION

If your country has sent secondary school teachers to other countries, please indicate the extent to which this has had impact on your country’s education system by checking the appropriate box.

SD-Strongly Disagree; **D**-Disagree; **A**-Agree; **SA**-Strongly Agree

	SD	D	A	SA
The country has experienced teacher shortages				
This has helped create employment for more teachers				
There has not been any impact on the education system				
Returning teachers have come back with new skills and expertise				
Teachers in the diaspora have supported local schools and teachers				
Other Please, specify.....				

10. If your country has received secondary school teachers from other countries, please indicate to what extent this has had impact on your country's education system, by checking the appropriate box.

SD-strongly disagree; **D**-Disagree; **A**-Agree; **SA**-Strongly Agree

	SD	D	A	SA
Migrant/expatriate teachers have helped mitigate teacher shortages				
Migrant/expatriate teachers have brought new skills and expertise				
There has not been any impact on the education system				
Migrant/expatriate teachers have negatively impacted education				
Other Please, specify.....				

11. If migrant/expatriate teachers have helped to mitigate teacher shortages, please provide more details, stating the main subjects affected

.....

.....

.....

12. Please, suggest three ways in which your country and other countries in the Southern African region can improve the management of teacher migration.

i.

.....

ii.

.....

iii.

.....

13. Do you have any other comments?

.....

.....

Thank you for taking your time to complete this questionnaire.

APPENDIX E: SCHOOL PRINCIPALS QUESTIONNAIRE

The purpose of this questionnaire is to obtain information about teacher migration in your school and country as part of my doctoral studies at the University of South Africa. The title of my thesis is *A strategy for Managing Teacher Migration in Southern Africa*. The information collected with this instrument will be used solely for academic purposes and the confidentiality and anonymity of the respondent will be assured.

BACKGROUND INFORMATION

Country:.....School:.....

Initials of respondent:.....(optional)

SECTION A: NUMBER OF MIGRANT TEACHERS AND SUBJECTS AFFECTED

1. Please, provide the total number of migrant/expatriate teachers in your school and their countries of origin, by completing the table below.

Year	Male	Female	Total	Countries of origin
2010				
2011				
2012				

2. Which of these subjects do most of the migrant/expatriate teachers teach? Please, indicate the percentage of migrant/expatriate teachers teaching each subject area in the box below.

	Percentage (%) of migrant teachers
Languages	
Mathematics	
Sciences (e.g. chemistry, physics, biology)	
Technological education such as ICT	

Arts	
Humanities and social sciences	
Business studies	
Other, please specify.....	

3. Has your school supplied/lost teachers to other countries?

Yes	
No	
Do not know	

4. If 'yes' to question 3 above, please provide the number of teachers who have left your school and the countries they have gone to (destination countries), by completing the table below.

Year	Male	Female	Total	Destination countries
2010				
2011				
2012				

5. If yes to question 3 above, which of the following subjects did most of the teachers who left your school teach? Please, indicate percentages in the table below.

	Percentage (%) of teachers who left
Languages	
Mathematics	
Sciences (e.g. chemistry, physics, biology)	
Technological education such as ICT	
Arts	
Humanities and social sciences	
Business studies	

Other Please, specify.....	
-------------------------------	--

SECTION B: CAUSES OF TEACHER MIGRATION

6. The following statements describe the reasons why secondary school teachers usually leave their home countries for other countries. Please, indicate the extent to which each statement characterises your school or country, by checking the appropriate box.

SD-Strongly Disagree; **D**-Disagree; **A**-Agree; **SA**-Strongly Agree

	SD	D	A	SA
Low salaries and other financial benefits				
Poor economic conditions in the country				
Poor school infrastructure and shortage of teaching and learning resources				
Shortage/lack of housing for teachers				
Lack of professional development opportunities				
Political instability and violence				
Natural disasters				
Other Please, specify.....				

SECTION C: IMPACT AND MANAGEMENT OF TEACHER MIGRATION

7. If your school has sent/lost teachers to other countries, please indicate the extent to which this has had impact on the quality of education, by checking the appropriate box.

SD-Strongly Disagree; **D**-Disagree; **A**-Agree; **SA**-Strongly Agree

	SD	D	A	SA
The school has experienced teacher shortages				
This has helped create employment for more teachers				
There has not been any impact on the quality of education				
Returning teachers have come back with new skills and expertise				
Teachers in the diaspora have supported my school and teachers				

Other Please specify.....				
------------------------------	--	--	--	--

8. If your school has received teachers from other countries, please indicate to what extent this has had impact on the quality of education, by checking the appropriate box.

SD-strongly disagree; **D**-Disagree; **A**-Agree; **SA**-Strongly Agree

	SD	D	A	SA
Migrant/expatriate teachers have helped mitigate teacher shortages				
Migrant/expatriate teachers have brought new skills and expertise				
There has not been any impact on the education system				
Migrant/expatriate teachers have negatively impacted education				
Other Please, specify.....				

9. If migrant/expatriate teachers have made a positive impact on the quality of education in your school, please provide more details.

.....

.....

.....

.....

10. Please, suggest three ways in which your school, country and other countries in the Southern African region can improve the management of teacher migration.

i.....

.....

ii.....

.....

iii.....

.....

Do you have any other comments?.....

.....

Thank you for taking your time to complete this questionnaire

APPENDIX F: MIGRANT TEACHERS QUESTIONNAIRE

The purpose of this questionnaire is to obtain information about teacher migration in your country of residence as part of my doctoral studies at the University of South Africa. The title of my doctoral thesis is *A strategy for Managing Teacher Migration in Southern Africa*. The information collected with this instrument will be used solely for academic purposes and the confidentiality and anonymity of the respondent will be assured.

Present country:.....School:.....

Country of origin.....

SECTION A: DEMOGRAPHIC DATA

Please, indicate your response by checking the appropriate category that applies to you.

1. What is your age group?

24 and below	
25-34	
35-44	
45-54	
55 and above	

2. Are you male or female? Male Female

3. What is your **highest** professional/academic qualification?

Post-secondary teaching certificate, diploma or non-degree equivalent	
Bachelor in education or equivalent	
Master in education or equivalent	
PhD or equivalent	
Other Please specify.....	

4. For how many years had you been teaching before you came to this country?

0-5	
6-10	
11-15	
16-20	
21-25	
26 and above	

5. For how many years have you been teaching in this country?

0-5	
6-10	
11-15	
16-20	
21-25	
26 and above	

6. Which of these subjects do you teach in your present school?

Languages	
Mathematics	
Sciences (e.g. chemistry, physics, biology)	
Technological education such as ICT	
Arts	
Humanities and social sciences	
Business studies	
Other, please specify.....	

SECTION B: REASONS FOR MIGRATING

7. The following statements describe the reasons why secondary school teachers usually leave their countries of origin to teach in other countries. Please, indicate the extent to which each statement characterises the reason you decided to leave your country of origin.

SD-Strongly Disagree; **D**-Disagree; **A**-Agree; **SA**-Strongly Agree

	SD	D	A	SA
Low salaries and other financial benefits				
Poor economic conditions in the country				
Poor school infrastructure and shortage of teaching & learning resources				
Shortage/lack of housing				
Lack of professional development opportunities				
Political instability and violence				
Natural disasters				
Other Please, specify.....				

8. Which of the conditions in the table below influenced your decision to migrate to this country? Please, indicate the extent to which each statement characterises the reason you decided to come to this country.

	SD	D	A	SA
Higher salaries and other financial benefits				
Better economic conditions in the country				
Better infrastructure and well-resourced schools				
Influence of relatives and friends				
Availability of professional development opportunities				
Political stability				
Other, specify..... please				

SECTION C: BENEFITS AND DISADVANTAGES OF MIGRATION

9. To what extent do the statements below describe the benefits you have enjoyed as a result of moving to this country?

SD-strongly disagree; **D**-Disagree; **A**-Agree; **SA**-Strongly Agree

	SD	D	A	SA
Higher income				
Acquisition of new knowledge, skills and expertise				
Establishment of new networks and contacts				
New cultural experience				
Other Please, specify.....				

10. Please, list three major challenges you have experienced as a result of migrating to this country.

- i.
-
- ii.
-
- iii.
-

11. Have you made regular professional contact with teachers and schools in your country of origin? Yes No

12. How would you best describe the recruitment process you went through?

Smooth with no hassles	
Difficult with challenges	

13. If difficult, please briefly describe the difficulties you went through.....

.....

.....

14. Please, suggest three ways in which the migration of teachers should be improved in this country and other countries in Southern Africa.

i.
.....

ii.
.....

iii.
.....

15. Do you have any other comments?

.....
.....
.....
.....

Thank you for taking your time to complete this questionnaire.

APPENDIX G: INTERVIEW GUIDE

Ministry of Education Officials/Teacher Unions/School Principals

1. What are the main causes of teacher migration in your country?
2. What have been the main benefits of teacher migration to your country/school?
3. What have been the main costs and disadvantages of teacher migration to your country/school?
4. How has migration affected the migrant teachers and their families?
5. How should teacher migration in your country and the Southern African region be managed?

Experts/International Organisations

1. What are the main causes of teacher migration in the Southern African region?
2. What have been the main benefits of teacher migration to the countries in the region?
3. What have been the main costs and disadvantages of teacher migration to the countries in the region?
4. How has migration affected teachers and their families?
5. How should teacher migration in the Southern African region be managed?

Migrant teachers

1. What were the main reasons you migrated to this country?
2. Please, describe the process you went through, from the time you decided to move to this country to the time you were hired as a teacher.
3. What have been the most positive experiences and benefits since you moved to this country?
4. What have been the least positive experiences or challenges?
5. How do you think teacher migration should be managed in Southern Africa?