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The Quality Imperative

Teachers, their unions and the Education for All campaign

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Realization of Education for All (EFA) objectives depends on multiple factors, but the degree of teachers’ engagement and sense of ownership of a national plan is one of the least understood and applied, despite its capital importance for successes and failures. While teachers are on the front lines of the EFA struggle, responsible for providing education at various levels, it is not clear that they actually have a say in the design of EFA programmes, their implementation, evaluation of what works and what does not and adjustments to get things back on track when there are problems. The umbrella concept for this engagement is social dialogue in education. It is the “glue for successful education reform”, without which “education systems cannot hope to achieve quality education for all”.1

A nod is often made at international conferences and within countries to the importance of highly trained, qualified, competent, motivated and performing teachers. A good deal less attention is paid to their actual involvement in decisions designed to achieve these ends and ultimately to ensure that every child and adult has access to a reasonable standard of education and training. Three of the factors which the Dakar Framework for Action states are required for successful education are well-trained teachers, a curriculum that builds upon the knowledge and experience of teachers and learners, and participatory governance and management.2

This paper examines some of the recent evidence on the extent and nature of teachers’ involvement in Education for All (EFA) decisions, ranging from the way in which individual teachers interact with school leaders, inspectors, school governing bodies and Ministry of Education officials in a world where more and more decisions are decentralised to schools and training centres, to the role of the collective teachers' voice: their unions, and these organizations' roles in influencing education policy. The paper focuses primarily on the second question. For lack of time to research the question, it does not include specific information on private sector educational dialogue.3

The paper does not pretend to be an exhaustive study of the subject. It is based almost exclusively on secondary sources, though in some cases, these works are very close to the day-to-day reality of schoolteachers. Many countries are not covered at all; in some regions hard evidence is lacking or non-existent. This sometimes reflects the refusal to recognise that teachers and the collective bodies representing them – unions and associations - have a role to play in deciding on education directions. The evidence cited here, and the subsequent analysis, are but a sample, albeit a broadly representative sample of the patterns for social dialogue in major regions of the world. The focus is on
developing countries, where the EFA challenges and the difficulties associated with forming genuine partnerships to realise the objectives, are the greatest.

1. Social Dialogue in Education

Defining social dialogue

In a multicultural world, it is always helpful to know what is meant by a particular concept. The Joint ILO/UNESCO Committee of Experts, set up to monitor and promote a high status for teaching personnel, built on recent International Labour Organization (ILO) conceptual work to provide a working definition of social dialogue in respect to teachers as meaning:

all forms of information sharing, consultation and negotiation between educational authorities, public and private, and teachers and their democratically elected representatives in teachers’ organizations.

This definition has the advantage of covering a broad spectrum of communications and decision-making mechanisms that govern relations between teachers and educational authorities, public and private.

Information sharing is understood to mean the widest possible means of communication with teachers and their collective representatives, from basic oral or written forms of communications at school level to highly developed and institutionalised means of sharing information between Ministries of Education and teachers' unions on a wide range of issues at national level.

Consultation ranges from informal, individual or small group discussions at school level, sometimes between a solitary teacher managing a village school deep in a rural area and community leaders or the occasional inspectors, to formal hearings or interviews between teacher unions and local, regional or national education authorities. Consultation implies that education authorities listen to teachers' views, but do not always act on them, apply them partially, or in the worst cases, ignore them completely. Consultation is often applicable to system-wide education matters – overall policy, planning, financing, educational organization, standards and issues of teacher education or professional responsibilities.

Negotiation, which in many countries takes the form of collective bargaining, is the highest form of social dialogue. It implies a sharing of power to decide, concessions between the parties and a formal, usually written agreement to carry out, evaluate and renegotiate agreed terms at regular intervals. Negotiations and collective bargaining are most applicable to decisions on terms and conditions of employment, but may also address issues that are both of a policy and workplace nature (for instance the size of classes). Collective bargaining agreements almost invariably contain some form of dispute settlement mechanisms, whether over violations of rights of individual teachers...
set out in an agreement or past practice, or the collective interests of teachers represented
d by their union. Where collective agreements do not govern dispute settlement, national
laws are the arbiters; in many, both apply.

Negotiation/collective bargaining, as will be indicated below, is often the hardest
and most contentious form of dialogue, and where unsuccessful or even where formally
denied, not infrequently leads to collective disputes – strikes or other work stoppages –
between teachers and education managers.

**Dialogue with teachers: the current context**

The basic prerequisites for dialogue are a democratic culture, respect for rules and
laws, and institutions or mechanisms that permit individuals to express their views
individually or collectively through unions or associations on issues that affect their daily
lives on both a personal and professional basis. Translated to education, this implies
respect for professional freedom and the active participation of individual teachers in
deciding a range of professional issues – curricula, pedagogy, student assessment and
organization of education within schools. International norms on professional freedom,
teacher responsibilities, relations between teachers and the education service, and teacher
rights have been codified in the ILO/UNESCO Recommendation concerning the Status
of Teachers, adopted by a special international conference in 1966.

Teachers participate in educational decisions in a variety of ways, from informal
communications with school heads on a daily basis to participation in school councils or
governing bodies. Participation is more problematic when teachers work in isolation in
one-teacher schools far from urban areas and access to school inspectors and other
education ministry staff, which is frequently the case in many parts of Africa, Latin
America and Asia.

For large numbers of teachers, especially those in isolated areas, information on
national EFA plans is rare if not totally absent until (and if) an order, directive or some
other form of communication comes from the ministry, regional authorities or a district
education office. Finding the means of informing and involving individual teachers in
determining national orientations, plans or strategies is the crucial first element for
effective dialogue. Special efforts need to be made by education authorities on a
proactive basis to reach out to teachers for their views, for instance through local or
regional workshops or hearings, information-gathering by inspectors and district
education officers or through teaching training programmes and resource centres.
Evidence suggests, however, that resources and political will to do so are limited.
Consultation on new plans that imply changes in curricula, teacher pedagogical practices
or other professional responsibilities is even more rare.

Qualitative research carried out by the Voluntary Services Overseas (VSO), an
international non-governmental organization (NGO), has highlighted the sense of
undervaluing, disempowerment and alienation that the average classroom teacher feels in
many developing countries. The resulting reports, based on first-hand views from
teachers in Malawi, Papua New Guinea and Zambia, concluded that teachers, including head teachers, do not feel that they have a voice in education decision-making beyond their immediate teaching or school environment. A common view from a secondary school teacher in Papua New Guinea sums up relationships in many countries: “There are no bottom-up communications. As a teacher I have not been consulted on anything in nine years about what teachers feel. They just do it in the top offices and then send it down”. There is a strong sense of distance from regional and national level decisions that are eventually communicated to teachers as immutable decisions, often divorced from their daily situation.

The harsh reality in poor countries is that resource constraints, both human and financial, limit the ability to inform and consult with individual teachers, especially in remote areas. To provide information and consult on major new initiatives such as an EFA plan first requires the political/administrative will to do so, and second the capacity to organize written communications with every teacher (letters, ministerial circulars, newsletters) or many local, district, or provincial/regional forums to explain government proposals and seek ideas and commitment from educational personnel. For many frontline EFA governments, where teachers rarely, if ever, see inspectors or education officers, such direct contact is impractical.

Even where efforts are made with regard to education policy and EFA, they often remain in the realm of mere information sharing. Assessments in the Pacific suggest that traditional community forums organized as a means of consultation serve more to inform and convince people about government policies and, accessorially, to help authorities to know of local problems. Comments from teachers or the public in such meetings rarely contribute towards change in decisions already made. One notable exception in recent years has been a National Education Forum organized by the Ministry of Education in Tuvalu for all teachers, head teachers and heads of ministerial departments to review education issues and teachers’ working conditions. Information is not yet available to know whether these consultations will lead to consensual change. The teachers association has been notably absent from these exchanges.

Ironically, some government attempts to involve teachers in educational change have run up against a puzzling indifference on the part of teachers themselves. This paradox may be explained in part by a superficial or non-existent flow of advance information and support for teacher participation in such forums and changes. An experience in Papua New Guinea is illustrative. Teachers were invited to take part in four regional workshops on a new secondary curriculum in 2000 and accompanying school visits by curriculum officials, yet only two completed consultation forms were returned by teachers to the National Department of Education. The explanation given was that teachers had not actually known about the sessions or had not been encouraged to participate. This raised questions about the effectiveness of information sharing between head teachers, inspectors and the teachers, and the real desire of authorities to have teachers engaged in forums which might lead to criticism of official policy. The National Education Plan 1995-2004 is reportedly silent on teachers’ input to educational reform.
Meaningful dialogue with teachers’ organizations

The legal, political and institutional basis

Meaningful dialogue involving teachers’ representatives – unions and other associations - begins with a legal recognition of the right to form organizations independent from State or private employer control in order to promote and defend the rights and interests of teachers. At a second, no less important level, the rights of such organizations to bargain collectively on conditions of employment, whether in the public or private sectors, should be recognized and applied in practice. Without such guarantees, dialogue is subject to the whims of the employer and may be ignored or denied with impunity.

One of the basic indicators of these rights is the extent of ratification by governments of fundamental international labour standards governing freedom of association, the right to organize and collective bargaining. While adherence to these standards does not guarantee that sustainable dialogue on such matters as EFA and the conditions determining a high quality teaching profession will actually take place, it does constitute a “floor” for further dialogue.

A recent assessment of the minimum international labour standards, which should apply to teachers as to any other category of workers, found that there is a widespread adherence to the two fundamental labour standards on freedom of association and the right to organize adopted by the ILO, with some notable gaps among Arab States and in Asia. The picture is much less positive when it comes to ratifying, and by extension adopting legislation and functioning mechanisms to apply laws on collective bargaining generally and labour relations specifically in public services, where the largest number of teachers work. Few countries have ratified these standards, with the exception of countries in Western Europe and, to a lesser extent, Latin America; no countries in Asia or Arab countries have done so.

The practical application of recognized principles

While ratification, or the lack thereof, does not automatically mean either a guarantee or a denial of meaningful consultative or negotiating frameworks, it does provide significant indicators of willingness to accept teachers’ organizations as legitimate dialogue partners. It is no coincidence that the countries where teachers’ organizations have reported some form of participation in EFA forums and plan preparation (See the Evidence on Dialogue section and Box 1), are ones having ratified the two fundamental international labour standards on freedom of association and the right to organize. Adherence to these standards through ratification places obligations and pressures on countries to adopt legislation and institutional frameworks to enforce them. This then creates a culture and framework for dialogue. Where such application is minimal or non-existent, there is little chance that real and sustainable dialogue on education policy, in this case EFA, or on the parameters that define teaching and the teaching profession, will be observed.
Not surprisingly, there is little evidence pointing to specific national legislation to oblige or even encourage governments to engage in social dialogue with teachers’ organizations (or civil society generally) on education reform or EFA. There are a few limited examples, such as the Education Acts of Pacific countries (for example Fiji, Papua New Guinea, Vanuatu), which provide for education forums or advisory boards on various professional issues, including representation from teachers’ organizations. However, although intended to be bodies for the initial discussion of new policies and reforms, these have been transformed largely into information dissemination forums, where school management representatives outnumber teachers’ spokespersons and “dialogue” is limited to making comments on government reports with no real prospect of change.\textsuperscript{15}

Even where countries have widely ratified international standards and implementing legislation there are problems, as cases involving complaints by teachers’ organizations to the ILO’s Committee on Freedom of Association testify. Numerous countries that nominally ratify international standards do not apply them in practice. An extreme example is Colombia,\textsuperscript{16} which has ratified the fundamental conventions on trade union rights and even public sector labour relations, but where teachers, especially teacher unionists, are singularly targeted by armed groups for death, rendering their exercise of the standards’ principles exceedingly difficult, if not meaningless.

At the same time, there are some non-ratifying countries, which, for various legal and political reasons (such as the two large North American countries, Canada and the United States), show a long and rich history of consultation and negotiation with teachers’ organizations, especially at local and regional (province or state) levels, even in the absence of formal adherence to international labour standards. Nevertheless, the absence of a legal obligation to consult in some forum provides less of a guarantee, especially on a major national policy issue such as EFA.

\textit{Evidence of dialogue: Standing still or stepping forward?}

Teachers’ organizations contend that the call of the Dakar Framework for Action for widespread participation has largely fallen short when it comes to consultation of teachers’ unions and their active engagement in EFA planning and implementation. A 2002 survey by the largest international organization grouping teachers’ unions and associations, Education International (EI),\textsuperscript{17} based on responses from about 25\% of its national affiliates, showed that more than half had no knowledge of national EFA forums set up to develop plans, while 40\% were unaware in general of national EFA plans. The latter figure no doubt reflects the inability of many countries to produce such plans two years after the Dakar meeting.\textsuperscript{18}

Where forums did exist and teachers’ organizations were aware of them, less than half had actually participated. Most often, teachers’ organizations reported that they had not been invited to EFA forums, either because these remained inter-ministerial or had been open to NGOs or other civil society organizations, but not to those of teachers.
Some reported having participated in a very *ad hoc* manner in one-off national forums to hear ideas from various groups, a sort of collective brainstorming. Some were involved with EFA plan development and execution in a structured, sustained basis, but many organizations which did get to the table found this to be a perfunctory exercise, as noted above for Pacific countries, with real decisions taken elsewhere, seemingly without the benefit of their initial inputs.

While a self-reporting exercise of this nature does not furnish a definitive picture, at the very least it provides a glimpse into the *perceptions* which agents of teachers as a whole form of their voice in crucial national education decisions. The survey also demonstrated opportunities at various levels for expanded dialogue on EFA planning and implementation. Such experiences are limited and rather broad in scope, involve different levels of engagement (from the general to more specific) and concern alliances with different actors. All show the capacities for education authorities and teachers’ unions to find common ground to advance the national education agenda (See Box 1).

Other sources differ only slightly from this general picture and tend to confirm its basic findings. In the Pacific, all countries with the exception of Kiribati and Cook Islands have a teachers’ union representative on the relevant EFA planning committee, and may have been invited to contribute to related education sector studies, as in Tonga. From a formal standpoint, representation is assured in most cases, but the assessment of experiences with previously existing education reform forums noted above, call into question the real impact that such representation has on teacher input to the EFA process. A more detailed assessment needs to be made to determine the positive impact on decisions and their outcomes resulting from teachers’ participation in diverse settings.
Box 1. Teachers’ unions and EFA Planning

The Education International (EI) survey on teachers’ union involvement in EFA conferences or forums on EFA planning showed information sharing and consultation with government authorities and other stakeholders to be broadly grouped into four types of exchange:

- **general participation with government and other stakeholders in a national EFA forum which carries out overall consultations and strategic planning (priorities, obstacles, funding):** in Burkina Faso two teachers’ unions have been variously involved with other stakeholders to analyse issues blocking EFA and develop a decade-long plan to develop basic education under the umbrella of a national EFA forum; the teachers’ union of Fiji cooperates with various governmental and non-governmental partners in a national EFA forum to establish priorities so as to realize EFA goals; the Namibian teachers’ union works with partners in the national EFA forum to help mobilize the necessary funds for EFA goals; and the teachers’ union of Tunisia has participated in regional conferences organized by the Government leading to a national programme for education reform;

- **direct cooperation with specialized education authorities or the Ministry on EFA related issues (largely information sharing):** the principal teachers’ union in Egypt reportedly participates in all Ministry of Education initiated activities and submits its views to the education authorities;

- **specific engagement in specialized EFA planning units of the Ministry of Education:** the teachers’ union in Kenya has worked with the ministry and the UNESCO National Commission to mobilise stakeholders to work on EFA goals, and to devise strategies on a range of professional and teacher concerns, including the impact of HIV/AIDS; the Sao Tomé and Príncipe teachers’ union participates in thematic groups to help implement the national plan of action; and the Tanzania teachers’ union is increasingly integrated into EFA planning with other stakeholders through a Basic Education Development Committee;

- **participation in a national EFA forum with other civil society stakeholders to pressure government for change:** the strategy followed by the teachers’ union in Gambia has been to use the stakeholder EFA forum to highlight problems with the quality of education, status and morale of teachers; the teachers’ union in Nigeria works with civil society alliances to promote EFA aims and objectives; the South African teachers union is a part of a national coalition allied with the world wide campaign organization (Global Campaign for Education - GCE) to mobilize pressure for chance, including within the government.

The responses are general in nature, and little information is available to indicate that these teachers’ organizations, while consulted, have significant influence on the final plans and their implementation. The most advanced form of engagement, associating teachers’ organizations with specific government planning and implementation units, appears to offer the most opportunity for teachers’ voices to be heard on operational activities. Its use remains limited.

Hurdles to dialogue

A major premise of the Dakar framework for realising EFA objectives by the 2015 target date is that non-State actors – civil society, which includes teachers' organizations – will assume an increasingly important role in a partnership to implement national EFA plans. More than two years after the Dakar meeting, civil society organizations were still complaining of their insignificant role in EFA. Though there have recently been signs of progress vis-à-vis civil society partners as a whole, the engagement of teachers’ organizations appears no better, often hampered by a combination of factors.

At the national level, factors impeding the participation of teachers and teachers’ organizations include lack of political will or fear of ceding power by governments, a weak legal and especially institutional framework, differences between political and administrative authorities or among teachers’ organizations, and the lack of capacity by both government and teachers’ organizations to engage effectively.

An example of the convergence of these obstacles is the case of Cambodia (Box 2), where research work on the ground found "no consistent, identifiable presence representing a broad range of teacher interests, rights and responsibilities in the planning process". Despite adherence to key international labour standards on paper, there is no institutional mechanism by which teachers can formally present their viewpoints either on overall education policy, or on their employment and working conditions, leaving a large gap in efforts to reconstruct the education system through a national EFA plan. Typical of many centralized EFA plans, the partnership for implementation in Cambodia includes a wide range of government ministries, donors, NGOs and civil society, but makes no mention of teachers or their organizations. Though teacher shortages, especially in rural and disadvantaged areas, oversized classes and the lack of real commitment by most teachers to quality teaching practices and innovation are known to afflict the Cambodian education system, the opportunity is not there for teachers to express their views, present possible solutions and or share in a committed effort to foster change.
Box 2. Teachers' voices and EFA in Cambodia

A remarkable and ongoing restoration of the education system in Cambodia, which was decimated by the genocide politics and wars of the 1970s, has been guided in recent years by an Education Sector strategic plan (ESSP) and a national EFA plan. Development of the plans involved widespread consultations, including ad hoc consultation with teachers in some areas. Yet, there is virtually no evidence that teachers or a nascent independent union, the Cambodian Independent Teachers Association (CITA), have been significantly involved in the planning and initial steps to implement the EFA plan. A second, mostly professional organization closely tied to the Government, the Khmer Teachers Association (KTA) reportedly has had minimal input to plans. The EFA plan refers to the necessity of partnerships with a wide range of educational stakeholders, including NGOs and civil society, grouped in an NGO Education Partnership, which does not involve the teachers. Reports from donor organizations praise the extensive consultation with NGOs but make no reference to teachers or their organizations. A survey of parental and teacher perceptions of ESSP in mid-2002 by the Ministry of Education indicated that these stakeholders need to be better informed if they are to be engaged in the reform process, but follow-up at least with teachers appears to have been minimal.

This failure to implement international commitments exists in a climate of low teacher salaries and esteem. Already high pupil/teacher ratios (as a consequence of EFA successes in getting more children into school), often far exceeding official norms, are increasing, putting severe pressure on a quality learning environment. Economic desperation has led to most teachers taking on second jobs and/or engaging heavily in private tuition schemes to meet parental demand for more instruction and teacher demand for higher remuneration; there are even reports of teacher abuses around exams. Under such conditions, with few exceptions, teachers have little incentive to improve pedagogical practice, or work on adapting national curricula to local needs, since time outside statutory teaching hours is devoted to secondary remuneration schemes, especially when the application of national curricula is the prevailing norm. International donors have cited the risks for lower teacher professionalism by the combination of such practices.

A recent analysis of the situation finds that "there is no evidence of consultation, much less negotiation, with teachers or their representatives concerning any of the salary or workplace issues". Obstacles are multiple: teachers are civil servants, and current laws do not provide rights for civil servants to organize unions or bargain collectively despite the fact that Cambodia has ratified the two major international labour standards on these questions and is expected to apply them; close ties to the political opposition make the emergent union a suspect partner in the eyes of the government; and the lack of teacher organization capacity to engage constructively with the government on education policy is a major handicap.

Sources: Knight and Macleod (2004); Kalouguine (2003); Eang (2003); NEFAC (2002); ADB (2003).
Centralized vs. decentralized decision-making

Much is made of efforts to move decision-making closer to the point of application by means of decentralization. The active engagement of central authorities in leadership on planning, funding and implementing agreed strategies for EFA is a *sine qua non* for success, as the Dakar framework makes clear. Yet, a highly centralized culture often translates into a reluctance to admit the need for teachers to participate in defining important EFA reforms, or fails to engage teachers and their organisations properly in their implementation. Even where policy is designed to foster change, the overall decision-making framework may work against the stated goals, as recent research in Indonesia (Box 3) has indicated. As a rule, teachers' organizations have traditionally been absent from the decisions that define professional issues and their parameters in Indonesia, a situation common to most other countries.

Box 3: Decentralization of curricula and pedagogy in Indonesia:

In the 1990s, decentralisation of curricula and pedagogy to respond better to local needs was strongly supported by the World Bank and international partners and embraced by the Ministry of Education. Research at school level a few years later contends that the reforms have largely missed their targets. A number of factors were cited, not the least of which is a deeply engrained tradition of accepting governmental authority in a very centralised and, until recently, repressive environment, combined with lack of effective training for change, and proper incentives for teachers to work differently. Teachers are civil servants and have been trained more to meet standards of loyalty and adherence to civil service statutes than individual competence, initiative and critical thinking. As a result, whereas official documents at various levels highlight the success of the policy, its application reportedly remains largely a dead letter in schools.

There is no indication that teachers' voices were involved in deciding on the change at any level, including raising warning flags about the obstacles in terms of working time and incentives which are cited as reasons for the policy's lack of success. The case study research tends to be confirmed by a report on teacher professionalism in Indonesia which states that the national teachers' organization is not involved in professional issues. Assessments by the World Bank on the need for greater decentralization to improve quality as part of EFA objectives refer to teacher issues and union militancy on salary and workload, but not to involvement in professional development issues.

Sources: Bjork (2003); Filmers and Lieberman (2002); Haribowo and Ali (2003); World Bank (2003)
Difficulties with influencing decisions within countries moving from centralized to more decentralized systems often reflect, as in Indonesia, a sense that decentralization has not been fully achieved. These views have also been discerned in the Pacific region, where teachers of many island nations express unhappiness at highly bureaucratic and centralized structures in which they have little say, and which frustrate local needs on subjects such as curricula and the professional work of teachers. Yet, those in at least one country – Papua New Guinea – having experimented with a relatively new decentralized structure, are reportedly unhappy with regional and provincial committees that tend to exert more control over local decision-making in violation of teaching service regulations. In such a context, more reliance on school-based decision-making can provide an alternative, but these are not entirely free of problems. Neither does it provide the answer as to how teacher input influences national policy issues that require central government decisions.

National contexts and international pressures: Where do teachers fit in?

Another constraint is the limited vision by international actors of the role that teachers’ organizations play, for better or for worse, in determining the success or failure of reforms. International financial institutions and education organizations, as well as bilateral development agencies considerably influence national reform agendas, but their analysis of teachers’ involvement is rather narrowly constructed.

An illustration is provided by a review of basic education reforms in five African countries undertaken by the donor agency USAID. The analysis looks at the complex and multiple factors which determine outcomes, among which are those of teacher unions. It notes that local level actors, “especially teachers, are in the long run, critical to implementing reform policies and programmes”, but that the policy formulation of teachers, parents and mid-level government officials is often limited to brief conferences or information sessions. However, the analysis is thereafter limited to brief descriptions of the influence of teacher unions in blocking or altering reforms with which they disagreed, wholly or partially. Certainly this is a logical consequence of ignoring teachers’ collective views, but the striking fact of the analysis, not untypical of research on this question, is the absence of any detailed examination of the role that the teachers’ organization could or does play in facilitating success.

It is an error to view teachers and teachers' organizations as tools of policy rather than actors who help to shape it. Some assessments of the complex and difficult road to reform have highlighted one of the often overlooked factors - the need to reconcile rapid change with the simultaneous need to bring teachers along in any such change, requiring careful thought and negotiation. Yet, on this question major conflicts tend to arise between the vision of cooperation agencies and those of national governments on how to expand both access and quality. When the external technocratic perspective, driven by the logic of its own development criteria, clashes with the political realities of national contexts and constituencies, reforms with teachers at the centre of them not infrequently fail to reach their objectives.
As the largest and most active international actor across a spectrum of countries, the World Bank is a prime example, though it is hardly alone. Indonesia again provides an illustration. Following on the heels of the decentralized curricula experience cited above, subsequent World Bank assessments have focused on quality by accelerating Indonesia's decentralization movement that was launched in 2001. Policies have emphasized greater community control and ownership, and referred to increasing teacher militancy on salary and workplace issues as a potential obstacle. Yet, they make no reference to the potential for teachers to be involved in decentralized decision-making on curricula and pedagogical issues. The same omissions are found in other contexts, for instance Brazil, where poorly qualified and underpaid teachers have provoked a special funding mechanism for schools and teachers, new teacher education initiatives, but no indications of teacher union involvement to help sort out problems. As will be explored more below, the World Bank led Fast Track Initiative (FTI) is also creating a framework for teacher policy issues that may very well override teachers’ concerns and input, and sow the seeds of conflict anew.

Still, signs are emerging that the gap between public pronouncements and policies within major international players on education issues appears to be narrowing, offering some hope that teachers’ voices will become a bit less distant in the future. One indicator of the change comes from an emerging dialogue at international level, where the World Bank President has stressed the importance of partnerships with teacher unions at national and international level in order to deliver quality education. A small sign of progress appears in recent support from the World Bank team covering Zambia for balancing traditional macro-economic concerns over public debt in that country with the need to unfreeze enough resources to hire part of the trained candidate teachers that are awaited in rural areas devastated by HIV/AIDS.

Long-standing views are slow to change however. The World Bank continued its ambivalent view of teacher union influence in its annual development report (2004), citing teachers’ organizations more as obstacles than supporters of reforms. At the same time, this view is somewhat more nuanced than in the past, since the report calls for teachers’ unions to become more involved in professional and broader policy issues.

Capacity to dialogue is critical

A third major obstacle, and not the least, derives from a widely acknowledged incapacity of many teachers’ organizations in the poorest EFA target countries to interact constructively with government entities and their international supporters. Given limited internal resources, with few exceptions teachers’ unions in many developing countries do well to provide the minimal services and leadership to their members on basic workplace and benefits issues. They have limited capacity to research and analyze complicated education policy issues – planning, financing and organization of an education system – and on that basis to actively participate in government organized commissions or other structures on EFA and education reforms. Research and policy units do not exist or are understaffed. Where union leadership recognizes the need, the resources are not often
there to act. Recent education reforms in Pacific island countries on professional issues – curricula, teacher standards and assessment – provide a classic example from small countries with few resources. The reforms do not have significant teacher input in the absence of full-time and knowledgeable union officials (which small unions cannot afford) to interact with government authorities. This situation thus tends to offset an “open door” policy of access to ministry officials for consultations on education matters (see below).  

Perceiving a need, the global union federation, EI, has undertaken steps in 2003 via an inter-regional project to help a number of its national affiliates to improve their research and policy analysis capacity on key issues facing education and teaching in their countries. An example of the difficulties and possible solutions that international assistance can bring to one African country, Tanzania, is provided in Box 4.
Box 4. Integrating the Tanzanian Teachers Union in basic education planning

With assistance from the donor community, Tanzania has developed a comprehensive Education Sector Development Plan (ESDP) and a Primary Education Development Programme (PEDP) which serves de facto as the country’s EFA plan. The Basic Education Development Committee (BEDC) plans and helps direct implementation of the PEDP through four major thematic working groups. Led by the Ministry of Education, the BEDC incorporates a wide range of educational stakeholders, including a broad alliance of educational NGOs.

In the early stages of the BEDC, government and donor sources considered that the Tanzanian Teachers Union (TTU) was invited to participate in policy and planning aspects. The union insisted, however, that it was not fully involved in all technical committees or working groups making important recommendations that were eventually endorsed and implemented by various bodies, nor was it substantially involved in district-level decision-making. This included government programmes to deal with HIV/AIDS, which increasingly affects the country’s education and teaching profession. One of the difficulties creating the gap between perception and reality was the capacity of the TTU to respond to all invitations to participate in the process and to bring to the table its own vision of how the PEDP could be implemented.

A series of policy dialogue seminars supported by the ILO and UNESCO brought together key government officials and the top leadership of the TTU at national and district level. There the views of the union on important issues were more fully articulated internally and to government officials. Means were examined together of more fully integrating the TTU in the BEDC working groups. In a companion measure, TTU undertook to restructure its policy analysis approach and created a poverty reduction strategy focal point within its officers to improve its capacity to research, reflect on and coordinate the union’s positions on education and poverty issues. This empowered the TTU to dialogue more ably with educational authorities and stakeholders at national and district level. A result of this closer contact and understanding of the BEDC process and the union’s desire to be directly involved is a much closer working relationship between the union and the BEDC structures at national level. The TTU has also undertaken to strengthen its interaction at the regional and district levels where the authorities have not always sought to engage them in decentralized education structures, including school committees; this process improves the chances that the voice of the average teacher will be heard. The TTU has also reportedly improved its networking with education NGOs and gained attention as a serious partner on education reform from donor representatives.

A parallel issue of institutionalizing public sector negotiating machinery to allow teachers a regulated framework for negotiating terms and conditions of service, also a part of the consultative process, was resolved with the adoption of new legislation (Public Service Negotiating Machinery Act) in November 2003. The law incorporates departmental negotiating processes, which allow teachers to negotiate terms and conditions with the teachers’ service commission.

Key lessons from the experience are that formal communication channels, while important, do not always suffice to help incorporate teachers’ voices in educational decision-making; extra steps need to be taken to overcome misunderstandings and to bring in the views of teacher union leaders from local and district levels. Second, developing the capacity of teachers’ organizations to research, analyze and defend policy positions which reflect the daily reality of teachers is critical to making their voices more distinct and heard.

Sources: ILO (2002 and 2003b); ILO and UNESCO (2003); TTU (2002).
Consultations, negotiation and collective bargaining on teaching conditions

The Dakar Framework contains a specific commitment to “enhance the status, morale and professionalism of teachers”. There is an implicit recognition that salaries and teaching/learning conditions help to determine the parameters of a professional teacher force and quality results, a cause and effect relationship at the heart of the ILO/UNESCO Recommendation on Teachers. This international standard, in turn, calls for salaries and working conditions to be determined through negotiations between teachers’ organizations and with teachers’ employers.

The extent to which teachers’ unions or associations can and do engage in negotiations leading to agreements on teachers’ employment and working conditions varies enormously by regions and countries. The limited 2003 survey prepared for the CEART, drawing heavily on ILO sources and previous assessments by Education International, suggests that the situation: is the most positive in North America and Western Europe; has improved considerably in Latin America where overall democratic change has had the most impact; is improving in Africa, Central and Eastern Europe, Central Asia and the Pacific despite pockets of resistance; and has the furthest to go in the Arab States and Asia, despite improvements in a number of countries in those regions.

Challenges to bargaining

Developments in several Latin American countries demonstrate both progress made and continued obstacles that condition education reforms, and by extension the potential for meeting related EFA targets. Among a broad spectrum of countries surveyed in 2003, structures for bargaining and the potential for positive outcomes vary, depending on the strength of organizations, negotiating capacity, political will and commitment to meaningful dialogue.

Some countries with strong and autonomous unions, capacities to negotiate, and a legal and institutional basis for doing so, offer the most possibilities for building consensus on a national agenda as well as meet their members’ desires for improvements in professional and material conditions. Chile (tripartite commissions on policy issues, bipartite structures for more specific workplace issues) and Mexico (joint and tripartite negotiating structures on a broad range of issues which involve both federal and state levels) are prime examples.

Some countries with strong unions and technical capacity for dialogue but confrontational politics and/or serious governance issues find it difficult to achieve consensus on reforms, which are often contested through collective bargaining and strikes. Argentina (negotiations at federal and provincial/local level marked by a high degree of social mobilization), Colombia (where negotiations at national and local level are undercut by the rampant violence against teachers leaders noted earlier), and Costa Rica (consultation and negotiations in a climate of political stability but failure to implement all agreements) are illustrative of this second category.
A third group, marked by fragmented unions, lack of capacity, little or no political will or commitment to dialogue and restrictions on freedom of association generally demonstrate even less ability to reach agreements, either on overall policy issues or basic teaching conditions. El Salvador, Honduras and Venezuela broadly fall into this group.

The resolution of challenges to a stable, forward looking bargaining environment in the first group of countries sets the stage for negotiated workplace conditions that also have the potential to impact positively on teaching and learning conditions. The development of new career structures linking salaries, career opportunities, professional development and assessment to various degrees in Chile and Mexico provide examples of good practice (see section on the material and social status of teachers and Box 8).

A major concern of many governments, and a focus of international financial institution efforts to contain public costs in developing countries, is the how and why of determining employment conditions – through negotiations or otherwise - with public sector workers. Teachers often form the largest single group of such workers, and given the high percentage of salary costs in the education budget and the signals that wage levels and conditions send to potential and serving teachers, these questions lie at the heart of education policy issues. Governments in many African and Asian countries in particular adopt a strategy of a unified public salary and employment package, to avoid competitive bidding among job categories and therefore higher costs. The problem with such a “one-size fits all” approach is that it rarely accounts for the specific needs of a highly complex work environment such as education. One solution to the dilemma has been found in South Africa (Box 5), which has set up an umbrella public service bargaining council with separate chambers for education staff and other job categories. Similar arrangements have now been adopted in Tanzania (see Box 4 above).

The South African experience points to the challenges that must be overcome in the transition to more democratic and transparent decision-making at the same time that fundamental changes are required in the education system. The countries of central and eastern Europe which emerged in the early 1990s from decades of centralized planning and non-democratic structures have been obliged to face similar, sometimes competing demands: reconstruct more genuinely participatory consultative and negotiating bodies covering public services and education at a time when large scale transformation of the education systems have had to be carried out within a difficult economic context. As with South Africa, some have chosen to try and reconcile the competing needs within a broader, coherent framework, which nevertheless takes account of specific sectoral needs. In Hungary, social dialogue and negotiations between the government and teachers’ organizations takes place within the framework of a national tripartite body responsible for trying to reconcile tripartite (government, employer, trade union) interests on a broad range of macro-economic and labour policies. Sectoral bodies supplement this framework, including one for the public sector and within that education, and these have been instrumental in negotiating a package on distribution of resources at local levels within the public services, including education, which supplements national decisions on wage levels.
Box 5. Bargaining and social dialogue in South African education

After the institution of the first democratically elected government headed by Nelson Mandela in 1994, South Africa moved quickly to regularize public sector labour relations with the establishment of the Public Service Co-ordinating Bargaining Council. The goals of the umbrella public service council are to enhance labour peace, sound relationships between the State as employer and its employees, and provide a forum for negotiations and collective bargaining on matters of mutual interest. To take account of the specific service needs and employment conditions of distinct categories in the public service, the relevant legislation admitted the creation of sector-specific bargaining frameworks, including the Education Labour Relations Council (ELRC). Teachers’ unions are represented on a proportional basis corresponding to the percentage of education sector workers they represent. Wages and conditions of service are, predictably, the main topics of bargaining.

The ELRC has also considered broader issues, notably the recommendations of the National Education Convention, convened in November 2002 to review transformation of the education system, to map out future priorities and commit educational stakeholders to work together to achieve agreed upon goals. The Convention was composed of delegates from national and provincial Departments of Education, teacher unions, the leading professional regulatory body, the South African Council for Educators and the education and training authority (ETDP SETA). The Convention’s recommendations were assessed by the ELRC for the development of action plans, with implementation timeframes, taking account of the “mutual interests” represented by its members.

Sources: ILO (2003c)
**Formal negotiations, agreements and application**

The importance of the conditions indicated above for successful outcomes of social dialogue in the education sector – a legal basis for exercise of rights, formal mechanisms and agreements – appears to be decisive when examining experiences in different small States. The geographic proximity of partners for dialogue is less important than the framework for achieving formal agreements that are enforceable. In those countries (large numbers of African and Pacific countries especially) with a tradition less anchored in formally constituted negotiating frameworks, negotiations may take place, but often demonstrate the limitations of less formal guarantees (Box 6).

**Box. 6 Negotiations on education and teaching conditions in selected small States – contrasting approaches**

**Estonia**, one of the newest and smallest members of the European Union, is undergoing a multi-year transformation of its education system to one more responsive to local needs, based on a high degree of school-based autonomy, at the same time that substantial efforts have been put into improving quality, teacher standards and assessments. Though the engagement of the teachers’ unions in all aspects of this endeavour is not clear, education sector dialogue is backed by legislation, constitutional guarantees and ratification of the fundamental international labour standards. A large and growing number of schools have concluded collective agreements, facilitating the introduction of staff remuneration in line with new standards and assessment methods, including discretionary authority for school directors to make extra payments that are in line with overall staff scales based on a signed agreement between the government, local authorities’ association and the principal teachers’ union (EEPU). Fluctuations in local government budgets that affect municipal schools, and by extension teacher salaries, have been dealt with more efficiently by another agreement between the central trade union confederation and local authorities.

In Pacific countries, ranging from “micro” States with less than 100,000 people to larger countries such as **Papua New Guinea** (more than 4 million), there is apparently great freedom of teachers’ associations to organize meetings with Ministries of Education in the context of relatively small island states. Service conditions are “negotiated”, if at all, through an annual “Log of Claims”; Papua New Guinea and **Vanuatu** are exceptions in that teachers’ representatives serve on teaching service commissions that help determine conditions in those countries. However, none of the concerned governments are bound by collective agreements on terms and conditions of service, which instead are largely established in umbrella public service legislation, updated by official government gazettes, and not always applied equitably by ministry officials charged with this task. The teachers’ associations, which have few or no full-time officials to monitor terms and help with local or individual grievances, find themselves in a weakened position to respond to teachers’ professional needs, lower teacher satisfaction with their work and capacity to perform. Capacity to adapt to new national priorities is lessened in such a context.

Even where agreements are reached, the political or budgetary process may derail needed reforms to improve teaching conditions. The case of Guatemala is cited in a recent report on progress towards EFA as a step backward. A bitter teachers’ strike supported by a cross-section of the population obtained guarantees in the framework of overall social policy plans for a small salary increase for teachers and teachers’ demands for continual professional development, improved working conditions and implementation of education reforms. Despite executive authority support for the increase, the legislature failed to approve the budget item, ostensibly because of lack of funds.41

II. Social dialogue and educational progress

Advances and good practices in key areas

Participation in education reform and EFA policy formulation: the interface between national and international frameworks

Despite the hurdles, signs are appearing that more consultation with teachers’ organizations is emerging from efforts to accelerate EFA implementation through a wider partnership. At the same time, recommended policies on teachers are not always coherent. Those advocated to speed up EFA delivery not infrequently run counter to other international policy recommendations on a high status teaching profession.42

One of the key areas for dialogue is the Fast Track Initiative (FTI) supported by the World Bank and a coalition of the world’s major educational donors. Two FTI benchmarks are of special interest because they not only relate directly to the cost concerns of governments and international donors, but also impact teachers’ material and social status, the quality of instruction or both. These are the teacher/pupil ratio of 40:1, and the establishment of teachers’ salaries at a maximum of 3.5 times the GNP of any country. Some analysts have questioned the use of these benchmarks as donor driven, isolated from national political and educational contexts, and/or questionable in their methodology and use as de facto “conditionalities” for assistance rather than flexible benchmarks to help guide sound decisions on EFA.43 The salary benchmark in particular, if imposed by government decision without any reference to negotiations with teachers’ unions, would be in violation of international labour standards, and risk provoking turmoil in teacher labour markets, not to mention commitment to EFA goals, as pointed out by a leading NGO coalition and international teachers’ representatives.44 Nevertheless, for a large group of the poorest countries, these benchmarks are likely to be important determinants of teaching conditions as countries seek to apply them in order to access additional resources for basic education more quickly.

Are teacher unions able to influence the course of events on the FTI and EFA? The recent review of FTI progress made by the World Bank45 suggests that teacher unions, along with business groups, parents, political groups and universities in Honduras, Mozambique and Yemen have been more closely associated with developing a
clearer vision and strategy for EFA by means of dialogue processes. Those processes and the degree to which teachers’ unions’ views are articulated and influence outcomes are not specified. In the same document, reference is made to the need for quality concerns to be addressed in terms of teacher working conditions, training and careers, in part to offset greater utilization of poorly paid and trained contract teachers and community schools (successes in raising salaries of contract teachers in Guinea and Mali are cited). Further along, the “success” in altering a teacher salary package duly negotiated between the government and teachers’ union, but criticized in the Bank’s 2003 report,\(^46\) is highlighted as a more sustainable policy to favour teacher recruitment. Decidedly, the signals from this newfound interest in dialogue are mixed.

Other recent policy prescriptions tend to confirm a growing interest in some countries to involve the teachers’ unions more directly in EFA planning and implementation as part of attempts to re-energize the partnership concepts of the Dakar Framework. Nigeria is a case in point, where a policy paper for newly elected legislators in 2003 that was prepared jointly by the main ‘development partners’ (external funding agencies) active in Nigerian education contends that a substantial role for civil society, including the National Teachers Union (NUT), has been envisaged in the development of the State EFA Action Plans. The NUT and its members could play a particularly important role, especially when it comes to implementation.\(^47\) How this plays out will be an important test of a shift in donor agency/local actor relationships, particularly as the same policy document focuses its messages to national decision-makers more on private, “faith-based” (religious) organizations, and repeats the sensitive FTI benchmark on teacher salaries. Subsequent initiatives taken by one of the major international donors (see below on teachers’ status) suggests that indeed there may be scope for a consultative approach to teacher salaries and incentives to confirm the donor agencies’ recommendations.

Dialogue on teacher assessment and professional development

It is widely acknowledged that a critical area for improving teaching quality as part of EFA goals to improve learning quality is to reform teacher competences, assessment and professional development. Much research and analysis focuses on these questions. Despite their obvious interest in this subject, and demands for change, teachers and their organizations rarely seem to have much influence on these issues. On the most basic question of how to improve teaching practice through better teacher education, assessments show how little attention is paid to using experienced teachers to inform discussions on pedagogy, curriculum and class management in teacher education programmes.\(^48\) Yet, the Dakar Framework for Action calls for a curriculum that builds upon the knowledge of teachers and learners, an echo of the guidelines of the ILO/UNESCO Recommendation. Professional development through continual or in-service training schemes is widely acknowledged to be under-funded and inaccessible to large numbers of teachers, a serious lacunae given the poor state and increasingly shortened focus of initial teacher education. Demands by teachers and their organizations to make this a priority are largely unsuccessful.\(^49\)
Educational decentralization: Do teachers’ voices matter?

Decentralization of education, including more school-based decision-making, has been one of the dominant education reform themes for nearly two decades. Despite a drumbeat of positive endorsement from its proponents, the impact on education and EFA is viewed at best as inconclusive: in some cases it seems to help, in others it obstructs. The small amount of evidence that exists does not lead automatically to the conclusion that decentralization of teacher management and support, among other key factors, leads to teaching quality, learning outcomes or teacher morale. Much depends on the availability of human and other resources and a political consensus to make it work, including that of teachers, school leaders and teachers’ unions.

In addition to ensuring that resources are there to make it work, widespread consensus is vital. Partnership approaches to governance within a decentralized system are judged to work best when based on democratic structures and values, i.e. when objectives are mutually negotiated, inclusive of all stakeholders’ viewpoints – teachers, parents, students and the community – and when they take account of the linkages between different levels and objectives of education. It helps that sufficient time is given to build partnerships, effective communication (information sharing) is maintained and clear roles are maintained that respect professional responsibilities and rights of educational staff.

Evidence is thin as to how extensively any or all of these criteria operate with regard to teachers’ participation. Usually, such involvement forms part of the larger circle of decentralized decision-making based on local community control or explicit devolution of authority to schools. The case of El Salvador is a positive example, within certain parameters (Box 7). Despite no adherence to the fundamental international labour standards, no formal freedom of association and no right to unionise for public servants, and therefore weak social dialogue conditions, consultations partially involving the teachers’ organizations in the 1990s led to the establishment of a model community education programme (EDUCO) to expand coverage and improve school operations in rural areas. A different type of experience was attempted in Nicaragua with mixed results in terms of teaching and learning innovation.

Other experiences from South American countries indicate that teachers’ unions can successfully negotiate agreements on professional issues and teaching conditions that allow for more decentralized decision-making, but preserve a central, even national role for unions, one of the central goals of those organizations who fear decentralization will weaken teachers’ voices in decision-making. The experience in Mexico leading to the adoption of a new teacher career structure (see below, Box 8) depended on an agreement to protect the role of the federal teachers’ union in future negotiations over teaching conditions between state authorities and the unions’ affiliates. In Argentina, a consensual agreement on the quality of education involving a provincial union (Cordoba province), the national organization (CTERA) and the provincial and federal governments was reached in the context of provincial decentralization and attempts to improve the quality,
equity and efficiency of the provincial system. Although the agreement failed eventually for financial reasons, it demonstrated the potential for agreement on broad policy issues even in the context of historically adversarial labour relations in Argentinean education.\textsuperscript{56}

Box 7 Social dialogue and decentralization in El Salvador and Nicaragua

**El Salvador** established a model community education programme known as EDUCO in the 1990s. It did so through a process of consultation (limited in the viewpoint of teacher union leaders) involving government and civil society organizations within a National Forum on Educational Reform. The consultations focused mainly on decentralization, school autonomy, teachers training and means of extending quality and equity in education to rural areas. The EDUCO program seeks to promote community participation in education to expand coverage and improve school operations in rural areas, focusing primarily on pre-primary and primary schools. EDUCO schools are managed by rural parents’ associations (ACE) that receive government funding to administer schools, maintain facilities, hire teachers and obtain teachers materials. EDUCO schools currently have an enrollment of over 200,000 students.

Some evaluations have suggested that teachers’ commitment with the communities is high and teachers’ absenteeism is lower among EDUCO schools. Learning results and some teacher support tasks are reportedly higher as a result of parental involvement. Lower teacher absenteeism is also attributed to greater employment flexibility to recruit and dismiss teachers, and higher teacher motivation and effort put down to pay variability (performance-related pay). Yet teacher turnover is also reportedly high, which could be attributed to the same factors. As working conditions, salaries and rights of teachers have been little discussed or not at all in the education forum, tensions inevitably remain on these subjects affecting teachers. The use of EDUCO as a decentralization model beyond the special context of post civil war reconstruction in El Salvador also remains a question mark.

In **Nicaragua**, school councils began as part of the autonomous schools programme. They may be initiated by teachers, and have reportedly allowed parents and teachers to increase their participation in school management, the former more than the latter. Composed of a majority of parents, their selection reportedly ranges from very democratic, based on elections of teachers and parents, to very undemocratic, based on selection by a principal, local mayor or ministry official. They have extensive human resource powers, including hiring and firing staff. Research has noted that the contradictions between the views of parents and the professional views of teachers appear most significant, however, in the preferences for teaching methods. Ministry officials, supported by teachers, have initiated innovative teaching-learning methods but the parent majorities on councils often prefer and vote for more traditional teaching methods.

As knowledge grows of teacher shortages, which threaten the realization of EFA goals, there is increasing interest in the conditions which influence people to join teaching, to accept willingly postings to difficult areas and school settings, and to develop and maintain professional competences, and which motivate them to perform as teachers to a high level (or at least those that meet minimal standards to realize EFA goals). One would expect the voices of teachers’ representatives to be the most influential in this area. Relative to other EFA related issues this is probably true, though the legal, political and institutional hurdles noted earlier continue to inhibit a fuller application of teachers’ views on these subjects.

Where political and institutional obstacles are not major barriers, teacher unions can play an important role in lobbying or negotiating improvements which not only benefit their members, but set the stage for recruitment and job satisfaction gains that help to meet EFA access and quality objectives. Research on the impact – positive or negative – of teachers’ unions in this area is not extensive. One example comes from Nigeria where, in late 2003, the teachers’ union reportedly convinced authorities at one level of a complex federal system (final decisions in line with the overall public sector salary structure are not known) to increase a number of teacher allowances which could shift the salary structure upward for large numbers of teachers, particularly those outside Lagos where recruitment is more difficult and qualifications lower. If state employment bodies accept the proposals, they would also be tied to registration with the professional teaching certification body, the TRC, thereby providing more guarantees of professional competences and responsibilities. It remains to be seen if higher allowances would be a disincentive in some cases for experienced teachers to remain in the system.

Examples from South America are even more striking in establishing the linkages between workplace conditions and professional quality. The emergence of new career structures in Chile and Mexico (Box 8) offers a glimpse into what is possible when educational dialogue is mature and takes a “high road” option towards quality objectives. In these settings, teachers’ unions are respected, and considered equal, if assertive, partners, capable of helping to resolve key points on the national education agenda through the bargaining process. Progress may be slower (more than a decade in Chile’s case) and inevitably more complex, but the results establish a stronger foundation for sustainable education gains.
Box. 8 Negotiating salaries, careers and professional concerns in Chile and Mexico

In a move linking teacher pay to performance, Mexico’s Carrera Magisterial (teachers career structure) seeks to increase professionalism in teaching, keep teachers in schools and improve teachers’ standard of living by linking salary to good teaching. Compensation is based on experience, professional skills, teacher performance and constant upgrading. It targets current primary and secondary teachers and was designed by the Secretary for Education (the ministry for education – SEP) and the Mexican Teachers’ Union (SNTE) in a long process of give and take leading to final agreement. Curricula reform also became a part of negotiated agreements, but the impact on student learning outcomes remains to be fully assessed.

Chile also adopted a comprehensive career plan, the Estatuto Docente (Teachers’ Statute), resulting from negotiations involving bipartite and tripartite mechanisms for social dialogue, which aimed at the modification of teachers’ salaries and employment conditions. Negotiations took almost a decade and agreements were object of three parliamentary laws. The first one, signed in 1991, regulated employment conditions, a common structure for salaries and employment stability for teachers employed by local authorities and private schools. The second law was signed in 1995 and introduced modifications concerning local educational planning and adjustments in the labor relations between teachers and employers. The final law was passed in 2001 and involved the Presidency of the Republic and the national union. It established salary improvements and new criteria that linked progress in the teaching profession to assessments and voluntary accreditation of competences. Coupled with these agreements, a programme on teacher assessment featuring peer assessment was agreed on a tripartite basis involving the Ministry of Education, the National Association of Municipalities and the teachers’ union (Colegio de Profesores), and was included in the Teachers’ Statute. A national teachers’ network (EDUCAR) for excellent teaching was also established, and as part of the negotiations process, class sizes in poor areas were reduced. The assessment strategy and instruments prepared by teachers and experts were due to be applied during 2003. A parallel system for assessment of performance offers financial incentives to those schools that improve students’ achievement in reading, writing, maths and sciences.

Sources: Gajardo and Gómez (2003); Liang (1999)
Impact on EFA quality concerns

Professional development, teaching practices and quality

In the 1980s and 1990s, some studies tended to minimize teacher effects on learning and the linkage between teacher qualifications gained from high levels of education and knowledge of subjects transmitted to students. In recent years, however, research has cited positive relationships between the two in both developing and developed countries. Other parameters certainly help, including regular presence and adequate hours at school, avoiding high levels of teacher absenteeism (not infrequently due to holding second jobs to make ends meet, or settling other administrative problems). Schemes to advance community ownership and decisions on recruiting and firing teachers by parents are some of the measures adopted to control for this important factor, a case in point being the EDUCO programme in rural areas of El Salvador cited earlier.

Other characteristics, such as experience, capacity to innovate and adapt to classroom conditions gained or not from professional development and assessment, presumably do matter as well, interacting together to influence better learning outcomes. It stands to reason that higher teacher quality resulting from their ability to influence decisions on curricula, teaching practices and continual professional development that meet teacher needs will positively impact on learning outcomes. Where this is not the case, professional development designed in abstraction from instructional realities is less likely to meet the objectives. One conclusion from a study in Pacific island countries was that where dialogue with teachers on professional development was absent, particularly in rural areas, there was little prospect for improvement in educational outcomes in the near future.

Evidence from a study of teaching characteristics (including qualifications, experience, wages, employment status, origins, sex) and student-learning outcomes (test results) in rural China definitely points to differences in test scores on the basis of teaching quality. The differences may be as high as one-fourth. The evaluation system for teaching assessment is centrally controlled. Teacher engagement in helping determine professional quality issues is not measured, but is presumably minimal in a society and education system that is rather strictly controlled by national norms and limits on individual autonomy. In this case, there is no doubt of the impact on learning from teacher quality, but the impact of teacher input to the quality parameters is unknown.

As a very rough and preliminary basis for evaluating the relationship, one can take as a proxy for improved quality, four indicators, two inputs - teacher qualification levels and pupil/teacher ratios – and two outcomes - pupil repetition rates and survival rate to grade 5 in primary schools. When assessed against indications of teachers’ influence on professional quality issues in certain countries highlighted in this paper, the results, admittedly uncontrolled for a range of other variables, do not indicate a strong
negative or positive relationship (Box 9). Similar mixed signals on such indicators could be obtained from Asian and Latin American countries.

Box 9. Comparing indicators of teacher quality inputs and outcomes in relation to indications of teacher influence on professional development issues

In Africa, Namibia and South Africa, countries with a relatively strong record on teachers’ participation in professional development and learning quality issues, the numbers of qualified teachers do not necessarily reflect such involvement, situated as they are below even the Sub-Saharan African (SSA) average, but so are the pupil/teacher ratios. Repetition rates are higher in Namibia (both countries are below the SSA average), but so is the survival rate to grade 5 (South Africa’s rate is lower than the SSA average).

In countries such as Benin, Burundi, Cameroon or Gabon, where there is little reported influence on government decisions on professional quality issues (though strikes in Benin have been reported over professional and social questions, and probably have occurred in the past in other countries), teacher qualification levels are lower than the SSA average in some (Benin) and higher in others (Burundi and Gabon); pupil/teacher ratios are generally very high and climbing over the decade leading to 2000; repetition rates are relatively high in three of the four countries; and survival rates to grade 5 are worse in the two countries (Burundi and Gabon) with precisely the higher teacher qualification levels. One recent assessment in Benin suggests that a major trade-off in quantity (rapid enrolment expansion) has not been matched by better quality, and that one explanation for high pupil wastage is the large (40%) and growing percentage of untrained community teachers.

Taken together, these countries therefore do not provide a clear picture of the relationship between inputs relating to teacher quality, learning outcomes and the degree to which teachers and their organizations influence professional development. The information base is not sufficient to conclude that teachers’ role in helping to define professional development is decisive or not.

Sources: UNESCO (2003), Tables 7 and 10; Gaye (2003)
It would be a mistake to conclude from the above brief assessment that teachers’ organizations have little impact on these matters, unless and until all possible influences are factored in. As noted below, the Dakar strategy assumes that teachers do affect change. To the extent that teachers’ organizations are important actors locally and nationally on these issues – through advocacy for or against reforms, political lobbying of national legislative or executive authorities which decide on programmes or funding, opposition in the form of work stoppages, etc – it is fair to continue assuming that teachers’ voices, strong, faint or absent, play a role, until conclusive evidence proves or disproves this notion. More research and reflection on this point is needed, perhaps as an outcome of the current global monitoring report exercise, bearing in mind at the same time that one recent analyst has questioned an overly prescriptive reliance on benchmarks and indicators in trying to measure EFA quality.  

Incentives to teach and educational quality

A basic premise in international assessments of educational development is that teacher morale and motivation to perform their work, though difficult to assess objectively, has a crucial impact on teaching quality and learning outcomes. The Dakar Framework assumes this perspective in one of its strategy points: “Teachers are essential players in promoting quality education, whether in schools or in more flexible community-based programmes; they are advocates for, and catalysts of, change.”

Evidence of what is assumed to be a truism is more difficult to come by, at least in terms of the direct connection between parameters assumed to define quality teaching, such as qualifications, competencies, motivation, and incentives to teach – professional as well as employment based – and quality learning outcomes. Though in the past some feel that aspects such as teacher salary levels, and conditions such as the size of classes, do not have a significant bearing on student learning, there is considerable evidence to the contrary in both developed and developing countries. The teaching shortage – chronic in many developing countries for decades, periodic in mid- and higher income countries according to changing labour market conditions – is one indicator. Though insufficient resources to hire more teachers is usually cited as the main variable, individuals also choose not to enter teaching or to leave it at the first available opportunity for a better paying job, particularly when teaching may not have been their first choice. There is anecdotal evidence that the quality of teaching candidates and those who remain in teaching has declined in the last 20 years since structural adjustment programmes ravaged public services and education, a factor not likely to be corrected by the increasingly shortened periods of initial education and deficient or non-existent professional development programmes offered in most countries.

Salary levels and infrequent payments operate at a second level: as an income “floor” on top of which teachers add to their overall income through moonlighting in second or third jobs, private tuition schemes, and in the worst case scenarios, racketeering in exam results – higher notes for payments, though the verifiable incidence of such practices is extremely marginal. The resulting teacher absenteeism, lower performance
or actual falsification of the learning process that can and does result from such practices undeniably affects teaching and learning quality. Much attention is also paid to the lack of teaching materials for adequate learning, the skewed distribution of salaries relative to other inputs and the excessive teacher-pupil ratios in some countries. Teaching quality may also be affected by the “solutions” to many of these identified problems: reducing salaries in favour of more teachers and/or textbooks; multi-grade and double shift classes which affect pupil/teacher ratios and hours of work, but which often create resentment and opposition not only from teachers but parents. The spread of the “volunteer” or “para” teacher option (“teachers” hired with minimal training and paid at rates from one-half to one-fifth of trained teachers) throughout West African countries is the most flagrant example of policies emerging in the last decade, ostensibly to control costs and permit more access without reducing quality. However, the verdict is far from universal on the quality outcomes, and the parallel two-track career structure creates a host of current and future problems for the teaching profession as a whole.

A working hypothesis of this paper is that the extent of teachers’ participation in defining these parameters constitutes an important correcting variable. Where there is consultation and especially negotiation on teaching and learning conditions, resulting agreements are a pressure point for more resources devoted to education, and/or more satisfaction and motivation from teachers that their concerns are expressed in the material conditions determining their work. Unilateral decisions by authorities to reduce resources and conditions for teaching under the pressure of financial constraints and externally-imposed criteria tend to work in the opposite direction, reducing incentives to engage in quality teaching and sending signals to teachers that their efforts are less valued. Over time, professional commitment and motivation to work through difficult conditions may become seriously eroded. Some of the surveys cited here tend to bear this out, both in terms of the negative impact from poor teacher morale and motivation facing many teachers in poor countries (manifestations include high teacher turnover, absenteeism, holding second jobs, racketing in private tuition, inappropriate methodologies, lack of concern for student needs and outcomes), but also the positive impact that can be obtained when there is high motivation derived from a sense of participation and therefore commitment to quality (Box 9).
Box. 9 Teacher morale, motivation and learning results in a rural Papua New Guinea school

The VSO project findings from three countries cited earlier highlight the positive example of a rural high school in Papua New Guinea, where, despite unsatisfactory salary and other service conditions similar to other teachers in that country, teacher morale and motivation is high, and student learning outcomes based on graduation and tertiary admission rates are relatively high. Effective school management is a crucial factor highlighted, not only the support and encouragement for teachers’ professional development which other school effectiveness research has pointed out, but respect for a range of teachers’ views and concerns manifested in open and consultative problem-solving, transparency in school budgeting and organization, and willingness to pursue teacher grievances with higher authorities. Teachers are reported to feel that their voices are indeed heard, and respond with greater levels of responsibility and performance.


The negative effect of teacher union actions on quality issues is often considered a given. Research on this relationship in Argentina (an adversarial terrain due to the inability to achieve satisfactory conditions for social dialogue) contends that teacher unions have little observable positive effects: actions to press their claims through strikes do have strong and negative effects on student learning; paradoxically, efforts to increase teacher job stability through tenure may also increase absenteeism, thereby creating an uncertain impact on learning; the union effect on public expenditure and teacher salaries tends only to increase the share of salaries in education budgets, not more investments in education; and that, strangest of all, union participation and job satisfaction are negatively correlated. Only lower student/teacher ratios show a positive correlation with union strength. The study admits, however, that there are some methodological limitations, which may understate the total effects of teacher unions, particularly in influencing national legislation and overall budgets at national level.

The evidence from other countries is contrasting. On the one hand, the case of Guatemala cited earlier suggests that negotiated solutions do not impact on better conditions and education resources (Guatemala remains one of the poorest funded systems anywhere, with less than 2% of GNP invested from public sources on education). Chile and Mexico, with strong traditions of social dialogue in education in recent years have very high percentages of public resources devoted to education – approaching or exceeding 5% of GNP – and relatively good professional conditions derived from negotiated solutions as noted earlier. Yet, Argentina and Colombia (especially) also have relatively high rates of public investment in education, whereas the social dialogue climate is difficult in the former, and dangerous for teachers in the latter. Though there are signs that one affects the other, the positive correlation between strong teachers’ organizations and strong public financial commitments to education remains to be proven empirically.
Conclusions: Teachers, unions and EFA

The potential for reaching targets

The potential contribution of teachers

Increasingly, analysts from various backgrounds conclude that teachers and their organizations have a key role to play in achieving education reform, especially those designed to attain EFA goals decided at the Dakar World Education Forum. As the Expanded Commentary on the Dakar Framework for Action clearly points out:

...No education reform is likely to succeed without the active participation and ownership of teachers. Teachers at all levels of the education system should be respected and adequately remunerated; have access to training and ongoing professional development and support, including through open and distance learning; and be able to participate, locally and nationally, in decisions affecting their professional lives and teaching environments. Teachers must also accept their professional responsibilities and be accountable to both learners and communities.

Evidence suggests that the Dakar positions are indeed confirmed in many countries. Whatever the gains in access (large increases in enrolment ratios) that are certainly not negligible, where teachers are effectively excluded from meaningful involvement in change – as in Cambodia, Indonesia and a number of African countries – their absence is synonymous with poorer quality teaching conditions and learning outcomes. Whether via active opposition of their unions in many African or Latin American countries, or passive resistance in the face of centrally-imposed decisions that they little understand nor appreciate as noted in several Asian countries, teachers often determine the success or failure of education reforms, including those linked to EFA.

At the same time, teachers and their unions or associations, have professional responsibilities that render them accountable to learners and communities. The extent to which this balance between asserting rights and respecting obligations is achieved becomes an important litmus test of progress towards EFA goals.

One way to approach the goal of stronger teacher commitment and performance is for education reform architects to actively build in, or strive to build in, a component of teachers’ participation in every reform. This is far from a universal trend, but change is in the air, at international level in the form of a fragile but promising dialogue between international financial institutions, bilateral donors, international teachers’ organizations and NGOs. Increasingly, this also occurs at national level as governments put into place practical measures to incorporate teachers’ voices in EFA planning/implementation structures and similar education sector reforms – the case of Tanzania and other African, Latin American and Pacific countries cited in this paper, however tentative and flawed at present.

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The point is not just to provide a voice for voices sake, even if desirable in itself for democratic decision-making, social and workplace justice. Whatever the imperfections in their own qualifications or competences, teachers are at the heart of the learning process. As such, their judgement on what works professionally and what does not should have at least as much if not more weight than distant technocrats, national or international, though it needs to be informed by networking, sharing of experience, evaluation results, reflection and change based on understanding of others good teaching practices – the teacher as learner. Moreover, their experience on a daily basis with a poor or rich working environment powerfully conditions their capacity to perform to high professional levels, and even more importantly, their motivation to do so. Positive experiences cited in Latin American countries and less positive ones from Africa and the Pacific underpin this observation.

The three Rs: Rights, responsibilities and roles

A commitment to new roles is needed in order to achieve the proper balance between the right to participate in shaping the teaching/learning environment, and a corresponding responsibility to adhere to high professional standards based on accountability to those for whom teachers work in the first place – students, parents, and governments who employ and pay them –. Here, there is considerable scope for teachers and their organizations to assume more collective responsibility, as suggested by the World Bank, and implicitly endorsed by Education International in its International Declaration of Ethics.

This Declaration is a policy guide for EI national affiliates and individual members that links quality education to teachers’ professional responsibilities, and encourages teachers, education workers and their unions to adhere to high professional standards through commitments to the profession, students, parents, colleagues, and management, while simultaneously requesting a commitment by communities to teachers. Considerably debated at the EI World Congress that adopted it in 2001, the Declaration is designed as a complementary tool to national laws and customs on the teaching profession (not to mention international standards in the ILO/UNESCO Recommendation) and taken together, could be used by teacher unions to help set national policy agendas on EFA which link professional responsibilities to workplace issues. Striving for the proper balance between responsibilities, rights and roles as a guiding concept of a professional teaching corps could be a powerful tool to push forward policies that increase access and quality sought by the Dakar Framework.

Steps forward to improve dialogue

Clearing political and institutional hurdles

There are a number of hurdles to be cleared if teachers are to be more involved and committed to EFA goals:
First, education and political authorities must realize that teachers can play a positive role, individually and collectively; the political will to dialogue must be present;

Second, ways must be found to overcome the barriers to information sharing and consultation between central or decentralized structures and teachers, so that meaningful dialogue can take place. The obstacles to be addressed are multiple: lack of communication resources, especially in rural and isolated areas and lack of understanding on how to inform, consult and participate. Encouragement and support for teachers is needed in the form of proactive measures which take account of teachers’ responsibilities: release time for example; demonstrating the willingness to act on teachers’ views; and communicating results back to teachers and schools – nothing is more alienating than the perception that investments of time to explain needs and offer ideas for change are essentially useless;

Third, effective school leadership is needed that will listen and act on teachers’ concerns. In some cases this will mean having a decision-making body such as a school council to channel dialogue;

Fourth, teachers have to assume their responsibilities when such opportunities are offered. This would include agreeing to take on a board a consultative role as an integral part of professional job responsibilities, including with students, parents and community stakeholders. Implicit in accepting such a responsibility would be rearranging working time to facilitate more consultation and participation, as far as they have the latitude within required hours set by law, administrative decision, decisions of school councils or by collective agreements.

At a collective level, the experience of social dialogue failures and successes, some of them cited in this paper, reveal that there are a certain number of steps necessary to create an enabling environment for sustainable dialogue. Among these, a legal and institutional framework for various forms of dialogue is critical. Respect for fundamental international labour standards to associate freely in independent organizations, which consult and negotiate on teachers’ interests and larger education issues, helps to define a culture for dialogue. Effective application of these standards by means of enabling legislation and the establishment of institutional machinery then becomes crucial. Examples include national councils that meet regularly and are inclusive of all stakeholders’ views, local or district consultations with teachers’ organizations, and collective bargaining mechanisms, local or national. Illustrations have been given of how collective bargaining mechanisms can successfully co-exist with policy needs to have a unified public sector approach, and of how an institutional framework serves better to sustain and apply the results of dialogue than ad hoc, informal arrangements.

There is finally the question of dispute settlement, whether on conflicts over national education policy or local workplace issues. Most teachers and their unions, however militant, will eventually admit that a teachers’ strike is the last weapon to be deployed in the bargaining arsenal; after all its use does not just stop making of a product,
it affects the learning processes of future generations. Yet, it is in effect a human right. The history of labour relations and social dialogue in education demonstrates that not having a formal right to protest or strike has rarely prevented teachers from “voting in the street”. It behoves all parties therefore to develop means by which differences and disputes can be settled in ways that avoid, where possible, that a lack of dialogue or its failure degenerates into strikes or other actions that disrupt education, without at the same time compromising the internationally recognized right of teachers, like any other workers, to use such means to defend their interests and promote quality education.

**Developing capacity to dialogue: national and international aid**

Last but not least, where political will has been shown (on both sides), a legal basis established and institutional frameworks set up, the capacity to dialogue has to be ensured, for authorities, individual school leaders and teachers, and organizations representing teachers. Decentralization policies have broken down in more than one country because the capacity to plan and manage resources and realize objectives through training and support was not built into the process, especially in poor communities with little previous experience and opportunity to do so. Constructive social dialogue has not infrequently been the victim of a defensive reaction by teachers’ organizations, which perceive themselves incapable of matching government, or international agencies’ mastery of highly technical education issues. Ministries, district education officers and school councils need support to enable dialogue, and so do teachers’ organizations.

The latter have to commit to the process by structuring their operations to generate their own capacity to research, analyze and bring coherent positions to the social dialogue table, as well as communicating and obtaining acceptance of outcomes to their members through responsible leadership. In that respect, demonstrating a capacity to marry coherent and holistic policies on professional issues, ethics and standards with workplace concerns in their negotiating positions is increasingly becoming the challenge of the future for teacher unions.

International organizations, whether acting from an international base or locally within countries, can help these processes along, by ensuring that they also commit to meaningful dialogue on teaching and education reform, including adapting their own objectives and criteria to national contexts. As intergovernmental or non-governmental organizations, or international teachers’ organizations, they can also play a vital role in helping to develop the all important capacity to exercise social dialogue meaningfully and responsibly, taking account of all the complex factors that determine quality teaching and learning.

After an initial euphoria over the renewed commitment at Dakar to realize education for all by 2015, a certain pessimism has emerged about progress towards these goals as political, cultural, financial and organizational constraints reveal themselves to be infinitely more complex than perhaps imagined at first. The partnership concept advocated in the Dakar Framework for Action needs to be more seriously applied, as many non-governmental organizations have increasingly argued. In so doing, sustainable
and meaningful social dialogue which gives teachers and their organizations more than just a distant voice in EFA plans and actions will be an important component of policy reforms.

2 *Dakar Framework for Action: Education for All: Meeting our Collective Commitments*, World Education Forum, Dakar, Senegal, 26-28 April 2000. Commitment 8(ix) is to “enhance the status, morale and professionalism of teachers”.


4 The full title of this international experts body, set up by the ILO and UNESCO in 1968, is the Joint ILO/UNESCO Committee of Experts on the Application of the Recommendations concerning Teaching Personnel (CEART). It is composed of 12 experts from different geographic regions selected for their knowledge and experience concerning the teaching profession. The CEART meets every three years to examine trends in the status of teachers worldwide and recommend changes in national policy and measures to improve the profession's status, conditions and the roles of teachers, and by extension, the quality of educational systems. Its latest report is available at: http://www.ilo.org/public/english/dialogue/sector/techmeet/ceart03/ceartr.pdf

5 CEART, 2003, op.cit.


9 Tweedie, 2002, pp. 30-33.


11 The Freedom of Association and Protection of the Right to Organize Convention, 1948 (No. 87), and the Right to Organize and Collective Bargaining Convention, 1949 (No. 98).

12 The Labour Relations (Public Service) Convention, 1978 (No. 151), and the Collective Bargaining Convention, 1981 (No. 154).

13 ILO (2003a), op.cit.
14 Tuisawau (2003), *op.cit.* contends that commitment to social dialogue in Pacific countries tends to positively correlate with a country’s membership of international organizations as they are then more conversant with international standards on the theme.

15 Tuisawau, *ibid*.


17 Education International was founded in 1993 by the merger of the two largest international teachers’ organizations at the time. It claims to represent 26 million teachers – over 40 per cent of the world’s estimated teachers - in 159 countries and territories at all levels of education. [http://www.ei-ie.org/main/english/index.html](http://www.ei-ie.org/main/english/index.html)


19 Tuisawau (2003), *op.cit.*


24 Tuisawau (2003), *op.cit.*


30 Tuisawau, op.cit.

31 Personal communication from the Deputy General Secretary of EI, February 2003; see also the information on development cooperation on the EI Website.


33 Dakar Framework (2000), op.cit, Commitment 8 (41).

34 Recommendation (1966), op.cit.


36 ILO (2003a), op.cit.


38 Christopher Colclough, et. al. (2003), Achieving Schooling for All in Africa: Costs, Commitment and Gender, Ashgate Publishing, Hunts, England


40 ILO (2003c), ibid

42 Those of the Joint ILO/UNESCO Recommendation, 1966 and the findings and recommendations of the CEART.


44 Education International (2003), *op.cit.*; Rose (2003), *ibid*.


49 Fry, et. al. (2002), *op. cit.*; the global weakness in funding and provision of continual professional development has been pointed out before in a number of reviews, for instance, ILO (2000b), *Lifelong Learning in the Twenty-first Century: The Changing Roles of Educational Personnel*, Report for discussion at the Joint Meeting, Geneva


53 ILO (2000b), *op.cit.*, citing various sources.

54 Marcela Gajardo and Francisca Gómez (2003), *op.cit.*


56 Gajardo and Gómez (2003), *op.cit.*


Key Indicators of Developing Asian and Pacific Countries, Special Chapter on “Education for Global Participation”, Asian Development Bank, 2003, citing especially works from Latin America.

Tuisawau (2003), op. cit.

Albert Park and Emily Hannum (2001), “Do Teachers Affect Learning in Developing Countries?: Evidence from Matched Student-Teacher Data from China”, Paper for the conference on Rethinking Social Science Research in the Developing World in the 21st Century, Park City, Utah, USA, 7-11 June.


Colclough et.al (2003), op.cit.

Colclough et.al (2003), cites different case studies in African studies which demonstrate the negative effects on teacher morale and motivation of various policies designed to come to terms with financial constraints and enrolment pressures, but which ultimately opt for a logic of cost efficiency over policies to build a high quality, professional teaching force.

Colclough 2003), ibid.; see also analysis by the Joint ILO/UNESCO Committee of Experts in the case of Senegal, 1997, 2000 and 2003 Reports.

Fry (2002), op.cit.


UNESCO (2003), op.cit.

ILO (2000a), op.cit.

World Bank (2004), op.cit.