



Education International
Internationale de l'Éducation
Internacional de la Educación

Education International

6th Annual Research Network meeting

Thon Hotel Brussels City Centre | Bergen Conference Room

Brussels, 14-15 June 2010

AGENDA

Monday, 14 June 2010, 10.00 – 18.00

Welcome Coffee 10.00, Meeting starts at 10.30

- 10.30 **Opening: Introduction and Overview of agenda**
Robert Harris, Senior Consultant to General Secretary, EI
- 11.00 **1) Report of the main research activities at EI**
Brief update on studies, reports and activities undertaken by the EI Research Unit since spring 2009
Presenter: Guntars Catlaks, Senior Coordinator Research, EI
- 11.45 **2) Education beyond the Crisis: What next?**
Presentation of findings from surveys on the impact of crisis on education. Discussion of emerging main trends in education policies during (and after) the economic crisis, and brain-storm about best research strategy in helping to develop union's policies
Presenters: Guntars Catlaks and Mireille de Koning, Professional Assistant Research, EI
- Lunch break 13.00 - 14.00
- 14.00 **3) Teacher Leadership project**
Presentation of a proposal for a research project on teachers' leadership
Invited speaker: Dr. David Frost, University of Cambridge, Faculty of Education
- Coffee break 15.00 – 15.30
- 15.30 **4) New methods of work: cooperation with universities and research centres**
Presentations of collaborative work with the University of Amsterdam (Netherlands) and progress report of the EI study 'Equity Matters' undertaken by Exeter University (U.K.) Discussion and sharing of ideas how EI and unions could maximize research capacities and leverage through partner networks.
Invited speaker: Dr. Elizabeth Wood, Exeter University
Introduction: Mireille de Koning
- 17.00 **5) Working conditions of school personnel – international comparative study**
Presentation of a research study undertaken by Japan Teachers' Union
Presenter: Prof. Seiji Fukuda and Keiko Uchida, JTU

First day adjourns at 18.00

19.00 Dinner hosted by EI at restaurant 'Bonsoir Clara'.
Location: Antoine Dansaertstraat 22
(Route from hotel to restaurant: see Map 2 on page 44)

Tuesday, 15 June 2010, 09.00 – 15.45

Coffee from 08.30, Meeting starts at 09.00

09.00 **6) EI and PISA: from constructive critique to critical engagement**
Discussion and brain-storming on how EI should develop more consistent policy towards international comparative studies by OECD in the situation of their increasing mutual coordination and convergence
Presenter: Guntars Catlaks

Coffee break 11.00 – 11.30

11.30 **7) The role of unions in education reform: Paradigms for measurement of teachers' performance and effectiveness**
Open debate on what is happening in education (and public sectors in general), specifically issues of performance measurement and effectiveness, and what research strategies EI and its affiliates could adopt
Moderator: Guntars Catlaks

Lunch break 12.30 – 14.00

14.00 **8) New Project Initiatives**
Proposals from EI Research Unit and members of Research Network

14.45 **9) Conclusions and future work**

Research Network meeting adjourns at 15.00

15.30 **Research Institute Advisory Committee meeting until 17.30** (*Separate agenda*)

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Report of the main research activities at EI

In this session a brief update on studies, reports and activities undertaken by the EI Research Unit and Research Institute since spring 2009 will be presented by Guntars Catlaks, Senior Coordinator Research

During the second half of 2009 and until April 2010 a number of research activities were undertaken, commissioned and initiated by the EI Research Unit and Research Institute. The following list provides a brief overview of these activities, a number of which will be discussed in depth in later sessions during this Research Network meeting.

Research unit activities

1. Research Study: “Learning how to teach: the upgrading of unqualified primary teachers in Sub-Saharan Africa”

The study commissioned to Herman Kruijer and presented to the Research Network at last year’s meeting was completed in December 2009 and published in April of this year. The study maps and analyses examples of upgrading programmes for unqualified primary teachers in three case study countries – Tanzania, Malawi and Nigeria. Its findings are based on interviews with teachers, union leaders and other educational stakeholders, as well as classroom observations, during an intensive field research undertaken in the spring of 2009.

2. Research study: “Education Opportunities for Refugee and Asylum Seeking Children in OECD countries”

The study commissioned to Paloma Bourgonje, and independent researcher, was completed in 2009 and published in April of this year. The study addresses the access to, and inclusion of, refugee and asylum-seeking children in education. It provides an overview of national policies and practices, as well as union activities being undertaken in this area, and reveals the wide variance between countries within the OECD. Furthermore, it reveals a number of challenges that teachers encounter and how unions have responded to them. Following suggestions from Research Network members during last year’s meeting, the case study countries included in the study are Australia, Spain, Sweden and the UK.

3. Follow-up survey on the impact of the global economic crisis on education

EI has been closely following developments of the global economic crisis and its impact on education sectors the world over since the end of 2008. In 2009, the research unit undertook two global surveys among EI member organisations, the first in January-March and a second follow-up survey in August-September. The results of the follow-up survey were presented to the EI CEE Round Table that took place in Budapest on 23rd-24th October 2009 and the EI Executive Board meeting in Brussels, December 2009. An updated report was presented during

the EI OECD conference in New York, March 2010. EI organized a high-level seminar in Warsaw in September 2009 on the *Impact of the global economic crisis on education in Central and Eastern Europe* and has set up a special website as part of the *Hands Up for Education* campaign, containing research reports, fact sheets, news releases and other practical information to help unions advocate with government and educate their members. (<http://www.ei-ie.org/handsup/en/>). Monitoring of education and the crisis will continue through 2010.

4. Research study in 2010-2011: Education in China

The project proposal on Education in China, tentatively entitled 'Teaching under China's Market Economy: Five Case Studies' by Dr. Shibao Guo, Faculty of Education, University of Calgary, was finalized in February 2010. The project is expected to run from 1 April 2010 to 1 June 2011 and to be undertaken by a team of researchers, under the lead of Dr. Shibao Guo. The field study based research will collect primary data through interviews with teachers, principals and education authorities and school visits in five provinces in China. The focus of the project is on the current social, political and economic context in which teaching takes place in China, and what challenges and opportunities Chinese teachers face under China's market economy.

5. PISA

During 2009, EI attended two PISA Governing Board meetings. Additionally, a paper entitled 'Alternative Models of measuring and presenting countries performance in PISA' that was commissioned by the EI Research Institute to Peter Mortimore, was presented to the PISA Governing Board. The paper focuses on teachers' involvement in PISA questionnaires, the longitudinal approach of PISA, and suggests presenting PISA results in forms alternative forms to "league tables". As a follow-up, the OECD has requested more detailed information on how EI envisions teachers' involvement in PISA. We are currently developing a potential research proposal, under the EI Research Institute, aiming at more consultancies with teacher unions during the preparation phase of the next PISA cycle.

6. TALIS

In preparation for the first OECD Teaching and Learning International Survey (TALIS) report published in June 2009, the Research unit prepared and circulated an EI commentary to all member organisations in OECD countries. In February 2010, EI attended the annual meeting of the TALIS Board of participating countries in Paris. During this meeting, the OECD presented proposals on future developments of TALIS, including videotaping classroom practices and linking TALIS results with those of PISA in 2012. EI encourages improvements in both OECD studies but objects to a direct link between PISA and TALIS. As a follow-up we have received an invitation to participate in a special OECD seminar on TALIS. A consultancy with EI member organisations in OECD countries on a priority rating exercise for a second round of TALIS was launched in April 2010.

7. EI Report to CEART

The Research Unit collaborated with the Education & Employment Unit in preparing the EI Report to the Expert Committee on the Application of the 1966 ILO/UNESCO Recommendation on the Status of Teachers and 1997 UNESCO Recommendation on the Status of Higher Education Teaching Personnel. The report aims to assess the implementation of the recommendations from the perspective of teachers' unions, and addresses key issues pertaining to teachers and

higher education personnel, including: teacher shortages, teachers' qualifications, working conditions and salaries, preparations for the teaching profession and continued professional development, academic freedom, security of employment and tenure for teachers, safe school environments and HIV/AIDS. EI attended the CEART meeting on 28 September in Paris, where the Report was presented.

8. Technical report: Education in Correctional Settings

The technical report entitled 'Teaching in Correctional settings' was finalised in September 2009. Based on a membership survey conducted in early 2009, the report aims to provide a global picture of the organisation and provision of education in correctional settings in different countries, and looks at the profile of teachers working in correctional settings. It aims to find out who the teachers are, to give an overview of their level of qualification, their working conditions and trade union rights, and to provide insight into unions' policies concerning this topic. This report is based on the responses of 54 EI member organisations.

9. Report: Early Childhood Education

The research unit collaborated with the Education & Employment unit on the analysis of a mapping exercise on early childhood education. The outcome is entitled 'Early Childhood Education: A Global Scenario. A report on a study conducted by the Education International ECE Task Force'.

10. EI commentary: EFA Global Monitoring Report 2010

The research unit contributed to the EI analysis of the annual UNESCO EFA Global Monitoring Report. The analysis is currently being finalised for distribution to EI member organisations. This year's GMR highlights the necessity of targeting marginalised groups in education, and that despite the progress made during the past decade, many countries continue to neglect their responsibilities, thereby delaying progress towards Education for All.

EI Research Institute projects

11. Research project: 'Assessing the impact of the global economic crisis in Central and Eastern Europe'

The research proposal on the impact of the economic crisis on education in Central and Eastern Europe submitted to the Open Society Institute (OSI) Education Support Programme (ESP) in London has been officially approved. The project is expected to run from May – October 2010. The project will analyse the impact of the crisis at the school level in four case study countries, including Poland, Slovakia, Serbia and Romania.

12. Research Project: 'Education as Welfare - Enhancing opportunities for socially vulnerable youth in Europe'

The EU funded Marie Curie EDUWEL Initial Training Network (ITN) project "Education as Welfare" in which the EIRI is a partner, began in January 2010. The objective of the research and training programme is to identify factors with which to extend young people's opportunities and capabilities in work, autonomy and participation - the central dimensions of welfare using the theoretical framework of the capability approach. Within this project the EIRI will receive

approximately 180,000 EUR to cover the appointment of an early stage researcher to work at EI for three years as from 1 July 2010. Working closely together with partner institutions of the Institute of Education, University of London, Nottingham University and University of Poznan, we aim at developing a study based on an EI membership survey, country case-studies and individual interviews. The project outcomes will provide a basis for the researcher's PhD thesis in one of the involved universities. As part of Marie Curie concept, there will be secondments and short visits of the researchers in all partner institutions.

13. Research study: 'Equity Matters'

The 'Equity Matters' study commissioned to Dr. Elizabeth Wood (University of Exeter, UK), commenced on 1 August 2009. A pilot survey was developed and sent to a sample of EI member organisations, the results of which are currently being analysed. A full survey is expected to be sent to member organisations within the coming month. The purpose of the study is to find how teacher unions' conceptualise and operationalise equity in the achievement of quality education for all.

14. Research projects: collaborations with the University of Amsterdam

EI received two initial proposals from the University of Amsterdam, following from the introductory planning meetings that took place with Dr. Mario Novelli and a group of PhD researchers at the University of Amsterdam (UvA) in June 2009. The topics of the two proposals are: Education reform and education and the global economic crisis. The projects involve field-based research undertaken by master students at the UvA, which will be developed into joint EI-UvA publications. Proposal has been approved by the EI Research Institute Board.

15. Project proposal: EU FP7 call in Social Sciences and Humanities 2010

A project proposal was submitted to the EU FP7 call in February 2010. The topic of the call is "Future of Public Services" with a strong emphasis on the analysis of forms of "New Public Management" and Public Private Partnerships. Following consultancies with the EU Commission, EI developed a project proposal with the support of interested member organisations. The deadline for the initial response from EU is July 2010. Partners that are currently involved in the project proposal include: the EI Research Institute, NUT, Läräförbundet, GEW, AOb, ZNP, FLESTU, the Institute of Education, University of London, and the Stockholm School of Economics in Riga.

16. Project proposal: Corporate Tax and Quality Public Services

The new Global Unions research project proposal on Corporate Tax and Quality Public Services was developed in 2009 with help of Research Unit. Currently the EIRI is seeking funding for this project.

Education beyond the Crisis: What next?

Presentation of findings from the surveys on the impact of the crisis on education, followed by a discussion of emerging trends in education policies during (and after) the economic crisis, and brain-storming about best research strategies in helping to develop union's policies.

Guntars Catlaks will present the main findings from the follow-up survey undertaken by the Research Unit, followed by open discussion among Research Network.

Since the onset of the global economic crisis at the end of 2008, EI has been closely following the impact on education sectors and EI's member organisations the world over. Two surveys conducted among EI's membership during 2009¹ addressed a number of issues in relation to the impact of the crisis, including: what have been the consequences for education budgets following a global trend of tightened fiscal policies? How have government measures affected teachers' working conditions and salaries? What impact have financial 'aid' instruments (IFI loans, stimulus packages, ODA) had on education funding? How have unions responded and what do they expect for the future?

The impact of the global economic crisis on growth, employment and income has not been consistent across countries and within regions, and as a consequence the effects on education sectors have similarly been varied, and heavily dependent on policies adopted by governments. In Eastern Europe, where economies were particularly hard-hit by the crisis, governments hoping to reverse their soaring fiscal deficits, reduced public spending, resulting in slashed budgets, severely lowered salaries, redundancies and hiring freezes within education sectors. Countries that requested loans from international financial institutions to help restore their heavily destabilised markets, have further tightened public spending as part of loan conditionalities, eroding possibilities for quickly reversing the blow to the public sector.

In Western Europe the impact of the crisis has been much lower on education in the countries surveyed, with the exception of Iceland and Ireland, whose economies have suffered considerably and expenditure for education has been cut, leading to redundancies and hiring freezes. Some countries have increased public debt in order to invest in public services, and have announced increased investments in education (e.g. France, Germany, and the U.K.). In others, governments have invested in education as a recovery strategy, for example the investment in higher education in Norway and Sweden. These diverging government reactions to the economic crisis are revealing: while some governments have cut public spending, others have taken measurements to maintain their spending, and a few governments have gone so far as to

¹ The following presents the broad findings of the follow-up survey on the impact of the global economic crisis on education sectors across the globe. In total, 59 union responses were collected representing 46 countries in all regions. EI would like to thank all unions who provided important information on developments in their countries.

increase public investments in education. The latter approach reveals that through increased public investment in education, some governments are actively meeting their commitments to move towards a knowledge-based society.

In some ways the impact of the crisis in North America resembles the situation in Western Europe. While the United States is considered to be the source of crisis, it was also one of the first countries that launched an exceptional stimulus plan, including investments in education. However, the situation remains fragile in many states which depend strongly on tax revenue, federal aid and concomitant increases or decreases of funding to education systems. Many states are facing severe revenue shortages and have implemented budget cuts in education, leading to lay-offs. In Canada, unions expect that cutbacks in education will lead to layoffs, larger classes, interventions by governments in the collective bargaining process and a lower of teaching and classroom resources.

In all regions, it is difficult to discern whether the closure, merging and/or reorganisation of schools and the removal of subjects and reduction in curricula are directly caused by the crisis or rather follow previous policies already planned by governments. The cutting of subjects such as foreign language classes and facilities such as guidance-counselling suggests that these might be considered as costly and superfluous expenditures by national and local governments. Trends towards privatisation of education (provision and financing) are as well reported from all regions, whether as a response to crisis or not.

Despite the diverging impact of the crisis in different regions, as public debt continues to reach high levels and governments are increasingly seeking policy solutions beyond public resources, sustainable public funding for education should remain a priority for the future. Declining government revenue, rising unemployment, and rising poverty levels mean that human development is threatened and people are more vulnerable than ever. Progress towards the alleviation of poverty in developing countries through the provision of, and access to, free public education is at risk of becoming undone. It is therefore not only important that education unions in the OECD region continue to lobby their governments to protect their own public sectors, but also that governments maintain their commitments towards other countries, notably through the millennium development and EFA goals.

With increasing pressures on governments to cut public spending, education unions need to propose smart solutions based on solid facts for the continued public investment in education as an investment for the future. EI's monitoring has revealed that some unions have actively and successfully responded to the impact of the crisis on education in their countries. A number of teacher unions in OECD countries have set up alliances with unions representing other sectors, as well as other bodies, to monitor the effects of the crisis on education, lobby their governments and to publicly advocate for investment in education. While there are a number of examples of good lobbying and campaign practices by unions, it remains difficult to foresee what impact the economic crisis will have on public sectors in the future, and how this will affect education systems in the long-term (e.g. the increased casualisation of teaching in both developed and developing countries and the increased role of the private sector in education provision and funding).

Discussion

- What impacts of the economic crisis on education funding in developed and developing countries can we expect in the coming two-three years?
- What are good practices of unions in their lobby or campaign towards increasing investments in education, and how can research support unions' strategies?
- How can EI's research activities be developed to support unions' initiatives and work to ensure quality public education?

Further reading

Education International (2009) "Education and the Global Economic Crisis: Results of the follow-up survey" [forthcoming]

Education International (2009) "Education: the cost of the crisis"

Education International (2009) "Brief overview: the impact of the financial and economic crisis on education in CEE countries"

UNESCO (2010) "EFA Global Monitoring Report 2010: Reaching the Marginalised" Paris: UNESCO

International Teacher Leadership Project

During this session Dr. David Frost at the University of Cambridge Faculty of Education will present a paper outlining a research project for collaboration with the EI Research Institute, as part of the International Teacher Leadership project.

Teacher leadership and Education International

This paper outlines an opportunity for collaboration between EI and the University of Cambridge Faculty of Education focusing on the concept of teacher leadership.

Rationale

There are many forms of school leadership. The ways in which classroom teachers experience leadership and the extent to which they are able to exercise leadership within their schools vary significantly. Teachers' autonomy and their ability to lead innovation and influence the direction of policy and practice are very much dependent on the nature of the leadership provided by the principal and his or her senior management team. Recent studies, such as 'Improving School Leadership' (OECD, 2008), have argued for the nature of school leadership to change and for a far greater emphasis to be placed on distributed leadership because of the increased responsibilities and accountability that leaders face.

What is very clear from all recent studies and discourses on school leadership is that the nature and degree of teachers' professional autonomy and confidence is dependent on school leaders' ability to build collaborative professional cultures in which shared leadership is a strong feature.

Previous studies of teacher leadership have tended to assume that this is equivalent to the designation of posts of responsibility for a small number of exceptional teachers. They have neglected the concept of leadership as a capacity that can be developed in all teachers regardless of their position in the organisational hierarchy. There is a very strong argument that the creative and innovative capacities of teachers are barely recognised in many circumstances and that this represents an untapped potential. For teacher organisations the priority lies in enhancing the confidence, professional knowledge and self-efficacy of their members.

The timing is propitious for a study which would help systematise arguments for teacher leadership in its own right. Such a study would be of interest to a wide range of national and international agencies, to individual teacher organisations within different countries and to European and global bodies, such as the European Union, OECD, UNICEF and the World Bank.

Currently, the International Teacher Leadership (ITL) project is coordinated by David Frost at the University of Cambridge Faculty of Education. It is located within the Leadership for Learning group and Professors John MacBeath and Peter Gronn act in an advisory capacity to the project. The ITL project is a research and development project with partners in: Bosnia & Herzegovina, Bulgaria, Greece, Croatia, Kosovo (as defined by UNSCR 1244), FYR Macedonia, Moldova, Montenegro, New Zealand, Portugal, Romania, Serbia, Turkey, UK (Sth East) and UK (Cambridge). There are also network links with colleagues in Australia and Canada. The purpose of the ITL project is to enhance teachers' professionalism by developing support for teacher leadership and to explore how this can contribute to educational reform. It is envisaged that the project will also leave a legacy of sustainable networks that will continue to support teacher and school development.

Proposal to Education International (EI)

It is proposed to create a specific stand-alone strand within the International Teacher Leadership project, focusing on a sample of affiliates to Education International. This would enable EI to establish a partnership arrangement with the University of Cambridge Faculty of Education which would be of mutual benefit. The proposal is to survey members of the EI affiliates using a questionnaire/instrument designed to generate high level qualitative data. Such data would enable us to know more about the current environment and existing opportunities within schools for teachers to exercise leadership, to influence policy, to shape professional practice and build professional knowledge. An essential aspect of this exploratory research would be to identify the nature and potential of links with teachers in other schools and with the wider community.

The sample would be drawn from a geographically representative range of affiliates and would include a balance of developed and developing countries. International studies, such as TALIS, would provide a useful background for informing the framing of questions and for providing a policy context for analysis. The analysis of the study would also provide EI affiliates with an important additional tool with which to influence the conduct of OECD's TALIS 2 study.

The time scale for the study could have some flexibility within it according to the needs of EI but the maximum length of time for the project would be one year.

Outputs and outcomes

The proposed activity would lead to a report identifying the nature and range of opportunities and strategies that support the development and enhancement of teachers' professionalism and

which would identify examples of current breakthrough practice. It would set out framework policy recommendations that could be adopted for use in individual countries. It would also draw on evidence to enhance the case and add rigour to arguments which teacher organisations could use with their countries' governments. It would underline the need for strategies to support teacher voice and highlight the contribution that teachers can make to educational reform and school improvement.

In addition the project could lead to the development of wider links between the EI Research Board and the University of Cambridge Faculty of Education's Leadership for Learning group.

David Frost

May 2010

New methods of work: research cooperation with universities and research centres

Presentations of ongoing collaborative work with the University of Amsterdam (the Netherlands) and progress report of the EI study 'Equity Matters' undertaken by Exeter University (U.K.). Discussion and sharing of ideas how EI and unions could maximise their research capacities and leverage through partner networks.

Dr. Elizabeth Wood, University of Exeter, Graduate School of Education has been invited to present a progress report of the research study 'Equity Matters'

Introduction: Mireille de Koning, Professional Assistant Research

During 2009 and the beginning of 2010, the Research Unit and Research Institute have sought to develop closer collaborations and exchanges with universities, research centres and institutes. Moving beyond previous methods of work that included in-house membership surveys and outsourced literature reviews, we aim to better merge our expertise with that of other education institutions and organisations, such as universities, within projects that address our common interests. In the future we would like to strengthen such collaborations.

We have previously established good cooperation with the London Institute of Education, University of London in the project Hidden Privatization and recently in submitting a joint proposal to the EU Framework Programme 7. Additionally, Robert Harris has established cooperation with Harvard University School of Education, with the potential to develop this cooperation.

Two further collaborations that were initiated in 2009 are:

- a partnership between the IS-Academie, AMIDSt, of the University of Amsterdam and Education International's Research Institute, and,
- a research project collaboration with the Graduate School of Education of the University of Exeter.

Partnership with IS-Academie, AMIDSt at the University of Amsterdam

EI's collaboration with the IS-Academie, Amsterdam institute for Metropolitan and International Development Studies (AMIDSt), at the University of Amsterdam takes the form of a partnership in two projects. The Research Institutes' role in the two projects includes facilitation (contact

with national teachers' unions) and coordination of the two projects, as well co-funding (field research and paper writing) leading to joint EI-UvA publications.

The two projects in which we will collaborate are: 1) **'Education & the Global Economic Crisis: Effects and Policy Responses'** and 2) **'Teachers, Teaching and Learning in Global Education Reforms'**. The first project addresses the impact of the economic crisis on education in selected case study countries in the developing world and analyse how the crisis is changing the education policy landscape. The second project analyses the perspectives of teachers and education stakeholders on education reforms, and their impacts on teaching and learning in selected case study countries.

Thus far, Mali and Bolivia have been selected as case studies for the education and the global economic crisis project, and Indonesia and Peru for the teacher reform project. Within these projects, master students at the University of Amsterdam will undertake field research over a period of three months in the respective countries as part of their final theses, following which their findings will be synthesised into joint publications, which will include input from EI, and perhaps other partners as well. It is likely that more students will join the projects, adding to the number of case studies.

The total duration of both projects is approximately 18-20 months, including: selection of case studies, preparation of research proposals, preparations for going to the field, undertaking of field studies, writing up of theses, synthesis into reports for joint publication. The final publication for each theme will include a broad introduction to the case studies and conclusions that compares the findings of the research, synthesising key findings and offering policy recommendations. The form of the publication is still to be determined.

Dr. Mario Novelli, IS Academie, University of Amsterdam is the coordinator of the project at the University of Amsterdam and Dr. Antoni Verger, IS Academie, University of Amsterdam will be heading the second project on education reform. Mireille de Koning will coordinate the project within EI. A funding proposal has been approved by the EI Research Institute Board.

Research project collaboration with the Graduate School of Education of the University of Exeter

In August 2009, EI's Research Institute (EIRI) started a research collaboration titled 'Equity Matters' with the Graduate School of Education of the University of Exeter, which was approved by the EIRI Board in May of that year. The project marks a new method of undertaking research in EI, in that the University has been requested to develop and undertake an EI membership survey, in addition to undertaking a literature review. The project has commenced under the leadership of Dr. Elizabeth Wood and a team of researchers. Below is a brief progress report provided by the team:

Education International and University of Exeter

EQUITY MATTERS IN EDUCATION

The role of the teacher unions is central both to defining their own interpretations of equity, and in influencing or mediating government policies and their impact on practice. Teacher unions in various countries may have very diverse concepts on equity and its role in education and subsequent policies. This project will enable EI to contribute to international debates about equity in education systems, in ways that can benefit its members.

Aims

The aim of this project is to capture the relevance of equity policies in the achievement of quality education for all in public education systems. Four key questions are being addressed:

1. How do education unions conceptualize equity in education?
2. How are these concepts operationalised, as evidenced in practices and policies?
3. What are the issues for teachers, with regards to the concepts of equity?
4. How can EI contribute to the international debate on equity in ways that benefit members?

Objectives

- To carry out a questionnaire survey of EI members regarding concepts of equity, leading to a qualitative analysis of the views and policies of member organisations;
- To carry out a number of country-specific case studies in order to identify how equity is conceptualised in education policies and practice.
- To carry out a focused literature review, which will provide an introduction and framework for the data analysis.
- To analyse, synthesise and discuss the evidence discovered in the empirical data and literature review;
- To identify key trends and developments, and future challenges for EI;
- To enable EI to make recommendations for future research;
- To enable EI to identify implications and recommendations for teachers' trade unions (policies and practice).

Progress

The literature review has been undertaken, and has informed the design of the survey. The questionnaire has been designed as an on-line Lime Survey. This has been piloted in English and is currently being translated into French and Spanish versions. These versions will be piloted in one French and one Spanish-speaking country to ensure accuracy of meaning and comprehensibility. The pilot survey has enabled us to begin to identify some of the country-specific issues that we might follow-up in the case studies. The full Lime Survey will be sent out by mid-April. We anticipate that analyses will be completed by the middle of May, and will be followed by the qualitative case studies. The Lime Survey tool allows quick analysis of the data, and we will also use SPSS to identify key themes and patterns.

We have already identified significant contrasts in country's education systems, which, along with wider socio-economic and socio-political factors, significantly influence their progress towards conceptualising and achieving equity goals. The evidence from the study will enable EI to consider key policy statements and directions. This aligns with international aspirations towards achieving greater equity in education systems.

Principal investigator:

Dr Elizabeth Wood, Professor of Education

Co-investigators:

Dr Keith Postlethwaite, Associate Professor

Dr Martin Levinson, Senior Lecturer

Dr Tricia Nash, Research Fellow

Discussion

- Please provide comments and recommendations on the projects
- Please suggest other possible ways of collaborating with universities and research centres, or suggestion potential partners
- Please advise on alternative methods and/or strategies of undertaking research at EI

International comparative study on working conditions of school personnel

During this session Professor Seiji Fukuda and Keiko Uchida will present a research study undertaken by JTU's Institute for Education and Culture.

In 2009, the JTU Institute for Education and Culture undertook a study to examine the teaching and working conditions of teaching staff in Japanese schools. The study closely examined teachers' working hours, the tasks they are expected to fulfil, as well as class preparatory work, and extra-curricular academic support and guidance to students. During this session, JTU will present the results of their study.

The following provides a brief background to the study as provided by JTU:

“The Importance of Class Preparation and working with Children” is the title of the final report based on an international comparative study on working conditions of school personnel which was established by JTU Institute for Education and Culture in June 2007 after receiving a commission from the Japan Teachers' Union. Through international comparison, the report reveals the conditions in Japanese schools where the amount of time for class preparation and for working with children is insufficient.

The committee selected Japan, England, Scotland, and Finland as cases for comparison. From January through May 2008, we produced and implemented a survey for “International Comparison concerning Work and Labour Conditions of Teachers”. For the implementation of the survey, we cooperated closely with the National Foundation for Educational Research (NFER) in the UK and Mr. Erkki (ASP), a sociologist in Finland. We conducted additional field investigations on from the end of February through the beginning of March 2008. Before the final case studies were selected, Prof. Fukuda also conducted surveys in Canada and Finland (September 2007), and Wales (November 2007).

Japan Teachers' Union also conducted a survey “Looking at Work and Labour Conditions of Teachers in Japan through International Comparison” in 2006 (report: “Looking at Work and Labor Conditions of Teachers in Japan through International Comparison”, May, 2007). We took over the survey for 2007-2008.

Seiji Fukuta

JTU Institute for Education and Culture

Discussion

- Please comment on outcomes of the research project and suggest ways of sharing research project outcomes between the Network in the future
- How can EI make better use of studies undertaken by Research Network members and other EI affiliates?

EI and PISA: from constructive critique to critical engagement

Discussion and brain-storming on how EI should develop a more consistent policy towards international comparative studies carried out by the OECD in the (likely) event of their increasing convergence.

Presenter: Guntars Catlaks

This briefing paper follows on our previous PISA-related activities: EI information related to PISA 2003, EI/TUAC/OECD consultations on PISA 2006 (Paris, September 2006, Brussels, November 2007), EI background paper on PISA 2006, EI survey on unions interactions with National Project Managers, and EI Guide to PISA 2006 (sent in November 2007), “Testing, Ranking, Reforming: Impact of PISA 2006 on education policy debates”, by L. Figazzolo (2008) and “Alternative models of analyzing and representing countries performance in PISA”, by P. Mortimore (2009).

In 2007, we wrote:

PISA is about much more than ranking of countries. Education Unions should underline that it again reveals interesting data on correlations between the performance of 15 year-old students in science as well as reading and mathematics, their socio-economic backgrounds, and the organisation of schools. But PISA does not convey the total picture of education. It can help to stimulate debate about education. But any attempts to use the PISA results to support political agendas would be a misuse of the report and the data it contains. (From the EI analysis of PISA 2006, December 2007)

PISA is not designed on the basis of national curricula and programs but it applies its own innovative concepts to assess literacy and competencies in mathematics and science. Nor does PISA assess performance across the full range of education. It focuses on **understanding scientific concepts and applying them to real life situations**. This approach aims at reflecting the changing competencies required in modern labour markets and, broadly, in societies - ranging from the application of new technologies to active citizenship, which many would agree with. However, given the increasing impact of PISA on education policies bypassing traditional consultancy forms, it has raised serious questions about the role of democratic decision-making and professional autonomy of educators.

EI has been very critical about the use of PISA in media and, broadly, in education policy debates. In particular, competition between countries in the form of league tables based on aggregate performance results has led to very simplified interpretations and unfair criticisms to education systems and teachers. In this respect, PISA has always carried about multiple consequences, depending on which aspects are highlighted in national debates. While findings about the importance of equity and homogenous learning environments were praised by unions in some

countries, the presumably low students' results in other countries have caused blaming of teachers and learning environments, favourable to broader social and cultural goals not reflected in PISA or in any tests.

On the other side, PISA is the most advanced example of the internationalization of the "culture of testing" in education that has been developing in many countries for decades. Despite our opinion about the contents and methodology used in PISA, this study provides a powerful case for "learning-outcomes-based" policies, which inevitably challenge the authority and autonomy of educators.

As far as **TALIS** is concerned, a special Teacher Survey Monitoring Group has been established in 2006, in the framework of TUAC, for scrupulously following the development of Survey Questionnaires and engaging in substantial critical debates with OECD experts on several occasions, challenging their approach of economical thinking. The group has become a recognized 'Teachers' Voice' for this OECD project. Since 2007, the Group has been critically following the Survey. TALIS acknowledges the importance of continuous professional development and the need for its expansion, and links it with financial incentives and an increasing monitoring of teachers' performance.

There could be a **potentially "dangerous" connection between TALIS and PISA**. The emphasis on individual teachers and their style of teaching, beliefs, cooperative attitudes, and, above all, "effectiveness", can indeed be linked to how these teachers' students perform in PISA, or to PISA-like assessments, with dangerous consequences for individual teachers whose students do not perform high enough. In other words, in future not only education systems but also schools and individual teachers could be evaluated according to how well their students perform in PISA-type assessments. EI has been consistently objecting such links, but we must be aware of the persistence of these ideas within and outside OECD.

The OECD itself, as inter-governmental organization with primarily economic development goals, is increasingly seeking the links and correlations between its various programmes and projects, including links between education, labour market and economy. We can expect an even stronger focus on policy recommendations relevant to labour markets and constructed from correlations between various studies.

The position of EI has developed over time in the light of the growing impact and dynamic nature of PISA (and related studies). With a deeper understanding of the contents of PISA and its policy recommendations, EI gradually invented new instruments – from EI analysis of PISA reports and consultancies with OECD and EI members, to commissioned studies and participation in discussions in PISA Governing Board. A progress was made, from mere critique to constructive proposals. In general, EI pursued the strategy of advocating further development of PISA (and TALIS) to make these studies broader, deeper and scientifically more sophisticated. This would limit the possibility of simplistic interpretations and policy recommendations and would increase their research value. On top of this, EI has insisted on the need to include teachers' perspective in PISA and in other studies, as well.

During the PISA Governing Board meeting on 2nd-4th November 2009 in Istanbul, the latest EI paper on *Alternative Models of measuring and presenting countries performance in PISA*, commissioned by the EI Research Institute to Peter Mortimore, and reviewed and approved by the EI Officers in September, was presented. The presentation focused on teachers' involvement

in PISA questionnaires, the longitudinal approach of PISA, and presentation of PISA results in forms other than “league tables”. The presentation was well received by the OECD secretariat and some government representatives, but met with criticisms from some others. There was substantial discussion afterwards. As a follow-up, the OECD has requested more detailed information on how EI envisions teachers’ involvement in PISA.

Consequently, we propose the following actions:

1. Internal survey among EI members for identifying if and how teachers would like to get involved into PISA in order to improve it.
2. On the basis of the survey’s results, presentation of a proposal for a broader paper to the OECD scholarship program (Fall 2010). This paper should investigate
 - a. How to improve the current content of PISA (in terms of questions, subjects, areas to be investigated upon, etc)
 - b. How teachers’ perspective can be integrated in PISA (kinds of questions they would like to be asked, areas they would like to give information upon, etc)
3. Presentation of results to the PISA GB Fall 2010. Presentation of the results of the small paper to EI affiliates, in conjunction with an informal consultation to be organized with the OECD for the launch of PISA 2009 (December 2010).

Discussion

- Please share your own experience in relation to PISA and strategies which you apply in dealing with comparative research studies
- Please comment on EI’s previous work on PISA (and TALIS)
- What strategy should EI use in the future development of PISA and TALIS: e.g. inclusion of teachers background questionnaire in PISA?
- Please advise on future lines of action!

The role of unions in education reform: paradigms for measurement of teachers' performance and effectiveness

Open debate on what is happening in education (and public sectors in general) – in particular issues of performance measurement and effectiveness - and what research strategies EI and its affiliates could adopt.

Moderator: Guntars Catlaks

Debates on the policy directions in education in the past decade have been increasingly focusing on learning outcomes and effectiveness indicators in search of the “hidden truth” behind the surface of education practice, which could help to design models of schooling achieving more with the same amount or even fewer resources. On the one side, this has been driven by economists who would apply the market paradigms of the 1990s to education. On the other side, by governments and organizations seeking relief of public budgets, and by politicians willing to improve their public image as advocates for greater accountability and progress.

In any case, effectiveness and efficiency have become the ‘call-of-the-day’ not only in education, but in other public sectors, too. Clearly, there is no problem with these concepts as such; indeed, they should be counted for in any democratic governance. However, the attempt to introduce them as measurement instruments for accountability in education is genuinely problematic. This is not only because these instruments are not perfect (they could be improved), but because they imply a particular, and limited, concept of education. Student learning outcomes, however measured, will never provide the full picture of educational outcomes (hence, education quality) for every system. At the same time, measurement of teacher performance, however complex will never reveal all factors affecting learning. However, if applied not as independent pedagogy research for academic purposes, but as a management tool, teacher measurement can narrow down the teaching and learning to preparation for high-stakes tests and to competition among teachers and among schools for the most capable and promising students.

This said, simple resistance and denial of the debate is hardly an option for unions. The ever-increasing inquiry into education matters by government agencies, researchers, media and civil society will continue, eventually bringing in reforms. Unions should be part of this debate, using their capacities of generating and distributing knowledge. The context of policy-making is changing and unions need to adapt. This requires open-mindedness, ability to participate in all relevant forums and a proactive attitude towards key issues and problems.

Recently, EI has addressed key topics in the current education debates: privatization, public-private partnerships, unqualified teachers, equity matters, performance pay and others. However, the concept of “effectiveness in education” seems to be critical. The OECD, in particular, is placing effectiveness at the core of the motives behind large research projects such

as PISA, TALIS and potential future AHELO. The understanding and interpretation of the concept, needless to say, matters. From the economic point of view, which is prominent in OECD, interpretation of “effectiveness” may be focused on linking students’ learning outcomes with teachers’ performance assessment. If this happens (and it is not far from happening, as there are signs of it both in the demands from governments and in the proposals made by the OECD), unions may face very difficult consequences. Hence the proposed EI’s strategy could focus on “deconstructing” the economic interpretation of effectiveness and on supporting an alternative understanding of it, based on the principle of pedagogy as a process with its internal logic and quality accountability.

In this respect, three trends seem to be critical in OECD current work on education assessment:

- 1) a focus on PISA or any similar standard test as a measurement of education outcomes;
- 2) teaching as an objectively quantifiable, hence measurable, process (TALIS);
- 3) teachers performance as an indicator of education quality (based on the two previous trends) and the consequent possibility of performance-related pay incentives.

These approaches do not constitute a correct evaluation of what quality education is, and are arguably misleading if expected to become a point of reference for educational policies, in EI’s view. Consequently, EI should undertake its own research work for identifying key elements for a fairer assessment of quality/effectiveness in education. In other words, EI should produce its own concept of ‘effectiveness’ of education, for it to represent an alternative (or a complement) to the OECD (economic) definition.

Such work would, hence, aim at:

- 1) first and foremost, explaining why the elements mentioned above prove to present one-sided and imperfect picture in assessing education of good quality;
- 2) trying to ‘frame-the-discourse’ by proposing its own concept of ‘effectiveness/quality’ of education, on the basis of a non-measurable, self-reflective, peer-based, co-operative, creativity developing, autonomous process of analysis of vast pedagogy literature and evidence among EI members

This work can be developed in three steps:

- 1) EI survey among its affiliates, with questionnaires (carried out internally, 3 months);
- 2) EI study based on field-work and evidence and literature review (outsourced to external researcher, 6 months);
- 3) statistical (SPSS) analysis of PISA 2009 - TALIS correlations, based on available databases (perhaps in cooperation with the OECD, 6 months)

The work would produce a final EI paper with a shared and comprehensive definition of ‘effectiveness’ of education to be brought as an alternative to the dominant, economic definition, and to be used as a criterion to assess education systems.

Discussion

- Please comment and advise on the proposed set of actions

New project initiatives

Proposals from EI Research Unit and members of Research Network.

In 2010-2011, we would like to undertake a number of new research initiatives set out below. We invite your comments on these initiatives; to indicate your interest to participate in these projects, as well as, or providing proposals for other activities.

EI Research Institute

1. **EI study on Effectiveness in Education** could be undertaken under the EI Research Institute grant in 2010-2011, and will include an EI membership survey and external desk- and/or field- study. There is potential for external fundraising/sponsorship. Within this study we intend to develop a set of arguments for a broader understanding of effectiveness in education, including social and cultural goals, and going beyond measurements of student learning outcomes in standardized tests. Such a study would target the core of the current education debate in OECD countries and suggest improvements in education systems and to provide data for potential policy development.
2. **EI desk-study on the link between PISA and TALIS** could be undertaken under the EI Research Institute in 2010, based on a statistical analysis of available databases of both studies on OECD website. It also has a strong potential for external fundraising. This study could lead to a thematic report examining positive correlations between teachers working conditions, student background data, and equity aspects and learning outcomes.
3. **Research project proposal “Quality Public Services in Future”** was submitted by a consortium of EI member unions and two academic centres to the EU Framework 7 Programme for funding. In case of approval it will last three years. If it is not accepted, we would still like to develop a similar project to undertake among the EI affiliates on a smaller scale. Such a study would examine correlations between governments’ policies on taxation and public education provision.
4. **Cambridge University study on International Teachers Leadership** with potential involvement of EI (proposed by NUT). *An overview of the project is set out on page 37.*

EI Research programme 2010

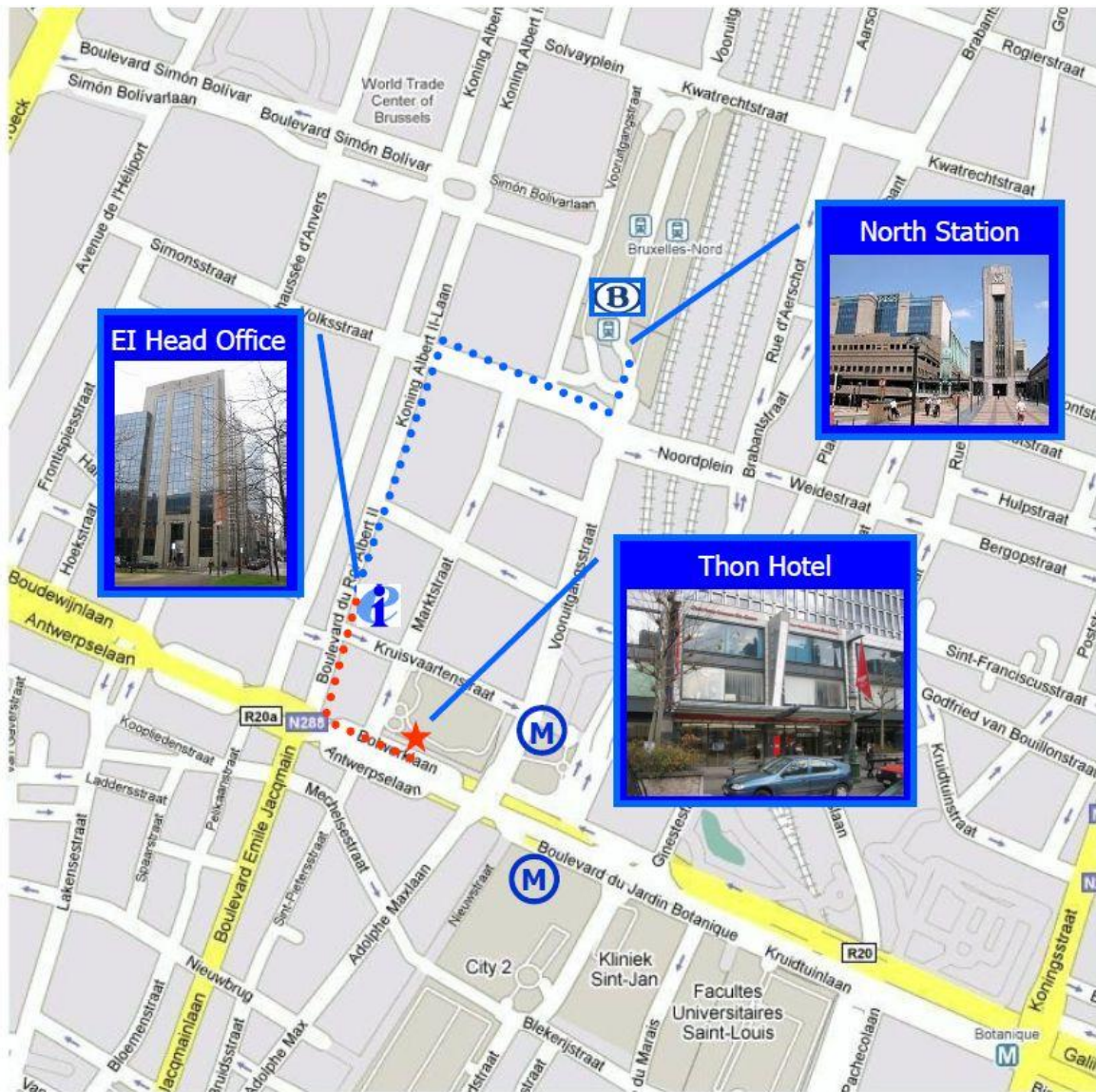
5. **EI study on Education for Unqualified Teachers in South and South-East Asia:** field-based research focusing on three/four case study countries in the region will be undertaken under the EI Programme in 2010. The research project will be undertaken with internal resources and will take a similar form as the the research study: “Learning how to teach: the upgrading of unqualified primary teachers in Sub-Saharan Africa”. It intends to gather first-hand evidence from teachers, school leaders involved in existing programmes, and policy makers and other education stakeholders, including EI member unions. The results of this research, combined with two previous studies (SSA and Latin America) will provide documentation for EI and its affiliates about the features and impacts of such upgrading programmes.

Discussion

- Please present your own ideas for future research work for EI and the Research Network

Map 1 – Meeting Location: Thon Hotel Brussels City Centre

Address: Avenue du Boulevard 17



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 Trajet Gare du Nord — Siège de l'IE
 Trayecto Estación del Norte — Sede de la IE
 Route North Station — EI Head Office
-
 Trajet Siège de l'IE — Hôtel Thon
 Trayecto Sede de la IE — Hotel Thon
 Route EI Head Office — Thon Hotel
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<http://www.thonhotels.be/brusselscitycentre>

Map 2 – Route to restaurant ‘Bonsoir Clara’

location of dinner on 14 June 2010, 19.00h

Address: Antoine Dansaertstraat 22



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