

# **The Global Economic Crisis and its Impact on Education**



**Education International  
Internationale de l'Éducation  
Internacional de la Educación**

# 1 Overview of Responses to EI Survey

Set out below is a summary of the responses received to the EI survey on the impact of the Global Economic Crisis on education which focused on education funding, infrastructure, human resources and official development assistance. The survey was sent to all EI member organisations in mid-February 2009 and is a follow up to a brief survey<sup>1</sup> sent out to member organisations at the end of 2008. Responses were collected until mid-March 2009. It should be borne in mind that the survey results below describe country contexts, as reported by unions, in a particular period of time. Changes in funding for education systems continue to take place in countries across the globe, and thus some of the data presented below may be outdated.

This survey focuses on cuts in government spending on education as a result of the global economic crisis, the needs of the education system (in terms of infrastructure and human resources), teacher layoffs and pay or pension cuts, national economic stimulus packages with a focus on education, reductions in official development assistance to or from countries, and proposed union responses to the economic crisis in their countries.

In total 48 union responses were received, representing 43 countries: Australia, Austria, Azerbaijan, Belgium, Brazil, Canada (3 responses), Chile, Republic of Congo, Costa Rica, Cyprus, Commonwealth of Dominica, Denmark, Finland, Georgia, Germany (2), Ireland (2), Italy, Jamaica, Japan, Korea, Malta, Republic of Moldova, Mongolia, Netherlands, New Zealand, Nevis, Nicaragua, Norway, Peru, Philippines, Poland, Portugal, Russian Federation, South Africa, Spain (2), Sweden, Switzerland, Taiwan, Togo, Tonga, United Kingdom (2), USA and Zambia.

The responses cover all regions in which EI is active, although the highest number of responses were from teacher unions in Europe (21 countries represented). In the African region four countries are represented, in Latin America five countries, in North America/Caribbean five countries, and in Asia/Pacific eight countries.<sup>2</sup> The total number of responses provides a global picture based on geographical distribution of the respondents' countries.

Not all the respondents report an impact on education as a result of the global economic crisis. It is mainly countries in Europe and North America, as well as some countries in Asia, including Mongolia, Japan, and Taiwan, which have been affected by the crisis, while the impact in other parts of the world is still marginal or foreseen for the future. Those countries who suffered most are those who experienced rapid economic development in the last decade and, as a result, were most vulnerable to the collapse of the international financial system. By comparison, larger and more prosperous countries, which have been affected economically by crisis, are in a better position to benefit from large scale stimulus packages which also target education, while weaker and more vulnerable countries depend increasingly on loans from international organisations, such as the International Monetary Fund (IMF) and /or the European Union. In the case of some countries conditionality tied to IMF

1 The brief survey on the impact of the current Economic and Financial Crisis on Education sent out at the end of 2008 received responses for 11 countries, including: Germany, Finland, Ireland, Italy, the Netherlands, New Zealand, Norway, Poland, Taiwan and the US. This first survey asked member unions to inform EI of cuts in government spending on education and increased privatisation of education as a result of the financial crisis. At that time only Italy, Ireland, France and the US noted reductions in government spending on education and education/teaching posts. The governments in both Norway and New Zealand intended to increase public sector spending, including funding of education. In Romania, Bulgarian, Portugal and France poorly paid teachers were highlighted as a problem.

2 This proportional distribution by regions corresponds to the usual response pattern to EI surveys.

loans has resulted in reduced government expenditure on education (in particular on teachers' salaries), such as in Latvia. Between November 2008 and January 2009, the IMF guaranteed almost \$50 billion to seven countries: Hungary, Ukraine, Iceland, Pakistan, Latvia, Serbia and Belarus.

Despite introducing reformed lending arrangements, in particular the so-called Flexible Credit Line<sup>3</sup>, which is accessible to emerging market countries, the IMF has still demanded that some governments balance their budgets if they want to receive aid.

A country's ability to generate public expenditure when income is declining largely depends on its capacity to borrow money by increasing public debt, which is for an increasing number of governments no longer an option. In a number of developing countries, particularly in Africa, the provision of and access to education may already be so precarious, that the current crisis seemingly cannot make it much worse (particularly when official development assistance supporting education diminishes). In numerous contexts poverty alleviation is still a long way off, and a lack of education accompanies serious challenges to basic needs, such as clean water, food and health facilities. It is difficult to identify the impact of the global economic crisis in an overall unstable education system. An official decline in Official Development Assistance (ODA) has not yet been revealed, except in Nicaragua, to which there has been a sharp decline in international aid<sup>4</sup>. There are indications that some donor countries might not be able maintain their commitments in a time when the majority of countries do not meet minimum ODA requirements in the first place, and when many people do not even benefit from aid that is donated.

The emerging pattern in industrialised countries is that the effects of economic recession will be connected with declining public taxation levels. The crisis will affect all sectors, including education. Such worrying concerns are clearly expressed in the USA and Norway, but also noted by some other European countries. As taxation for education in many cases is decentralized, the situation becomes increasingly unequal in different regions and municipalities of the countries concerned. While the current availability of direct or indirect aid provided by governments through means of increased public debt seems to be sufficient to cover deficits, it may not last forever. Another pattern emerging is the growing concern about the sustainability of pension funds, expressed by the Taiwanese union NTA.

## 2 Collected findings (by issue and region)

The findings of the survey have been grouped together by region (Africa, Asia/Pacific, Europe, Latin America, North America/Caribbean) and follow the sequence of the survey<sup>5</sup> itself.

### 2.1 Cuts in expenditure on education

3 The IMF's new Flexible Credit Line (FCL) introduced in March 2009, allows countries (in particular emerging market economies) to request precautionary loans, and according to the IMF is aimed at strengthening the Fund's ability to react to the global economic crisis. There is no ongoing conditionality in the FCL, which is normally the case for IMF loans, but countries must meet stringent pre-conditions to qualify for them. Both Mexico and Poland have requested such lending arrangements.

4 Article on IPS: José Adán Silva "NICARAGUA: Universal Primary Education Still Far Off" *IPS* 1 April 2009. Retrieved online, April 24, 2009, from: <http://www.ipsnews.net/news.asp?idnews=46354>

5 The full English language survey can be found in the annex.

## 2.1.1 Europe

In almost half of the countries in Europe (10 out of a total of 21 countries) the education system has been confronted with new cuts as a result of the global economic crisis. These countries include: Austria, Finland, Germany, Ireland, Italy, Moldova, Norway, Poland, Spain, and the UK. These cuts are in most cases as a result of a reduction in overall government expenditure on education, but in other cases as a consequence of tax reductions, or only in particular areas of education.

In Italy and Ireland cuts in education have taken place at all levels (primary, secondary, higher education) and including adult education and research. Cuts in Ireland include reduction in pay roll costs, administration costs and capital costs. Ireland has a lower than average investment in education compared to other OECD countries (4.6% of GDP compared to an OECD average of 5.8%). Additionally, resources for language support teachers have been curtailed to some degree and the provision of resources to support the integration of students with special needs has been delayed.

In Moldova cuts have taken place in the financing of education. There has been a consistent decrease in the share of education of GDP and the national budget, dropping from 8.7% in 2008 to a planned 7.7% in 2010. The government also plans to reduce the number of schools at the secondary level, and expenses will be decreased by 12, 6 million lei (2, 9 million Euro).

In Germany, VBE report cuts, but also large investments, in education that will allow for the improvement of education infrastructure.

In Finland there have been cuts in certain municipalities, depending on their economic situation, as they are responsible for maintenance of their own education services. This has resulted in increased class sizes, reduced curriculum and temporarily lay-offs of staff.

In the UK, according to the NUT, cuts have taken place initially in Higher Education, with the exception of science, technology and mathematics. The current labour government is trying to protect its current spending plans, but the conservative party which is likely to take over in 2010 is not committed to such protection. Deep cuts are expected. Also local authorities are setting local taxes at zero level or stand still for the next financial year which will inevitably reduce spending. The first cuts in government spending will likely take place in support services, infrastructure and in further and higher education. If the new government maintains the current three year public spending cycle then spending on education in the next budgetary period for 2010 - 2013 will be greatly curtailed.

In Poland, the government has suspended a number of previously planned initiatives, including the construction of sports fields in each administrative district and the purchasing of laptops for lower secondary students. According to ZNP International, financial resources for local government units target reserves which were intended for adjusting the school base for the admission of 6 year olds (a new reform aimed at lowering the minimum ages of compulsory school attendance). The reserves have been drastically curtailed. The project aimed at lowering the minimum age of compulsory school attendance has additionally been put back to 2012. Expenditure on infrastructure and investments in research within the Ministry of Science and Higher Education has been limited.

The eleven countries in which the education systems have not been confronted with new cuts as a result of the global economic crisis include: Azerbaijan, Belgium, Cyprus, Denmark, Georgia, Malta, the Netherlands, Portugal, Russian Federation, Sweden, and Switzerland. However, in some of these countries decreases in funding for education are expected in the future.

In Switzerland employers and employees pay a compulsory monthly insurance payment, and institutions which handle this money now face serious problems because of the financial crisis. Some of these institutions are planning arrangements that will include cuts in pensions and higher payments on the employee-side.

In Sweden, according to Lärarförbundet, there have not been cuts as yet, but education is part of municipal budgets (including teachers' salaries) and as the tax base is shrinking as a result of the crisis there is strong possibility of cuts in future.

While there have been no direct cuts to education funding in Georgia, high inflation rates which are not compensated for have led to the rapid deterioration of funding for education.

In the Russian Federation there have not been cuts in education spending. The government is refraining from cuts so far in public social sectors; however, current funds are insufficient and expectations for their increase are dismal. Rather the current government has just announced a large military programme to rearm its military forces.

In Norway it is difficult to determine whether there have been definitive cuts in education spending. UEN surveys on the 2009 budgets of municipalities and districts show budget cuts in education in approximately a third of them. One of the main reasons is lower tax returns on incomes which in turn are caused by the economic crisis which has hit the private sector first. Thus, despite the increase in overall national investment in the education sector, many cuts have still taken place at the school level.

Needs	Infrastructure	Human Resources	Other
<b>Country</b>			
<b>Austria</b>	<ul style="list-style-type: none"> <li>Investment in buildings, especially in VET</li> </ul>	<ul style="list-style-type: none"> <li>More teachers at upper-secondary level</li> </ul>	
<b>Belgium</b>	<ul style="list-style-type: none"> <li>Major investments needed for renovation and new buildings</li> </ul>	<ul style="list-style-type: none"> <li>More teachers in general.</li> </ul>	
<b>Finland</b>	<ul style="list-style-type: none"> <li>Renovate schools with damp problems.</li> </ul>	<ul style="list-style-type: none"> <li>More teachers needed to decrease class sizes in certain cases.</li> </ul>	<ul style="list-style-type: none"> <li>More opportunities for professional development (in-service training) for teachers.</li> <li>Prevent temporary layoffs.</li> </ul>
<b>Georgia</b>	Different infrastructural projects have been implemented and are underway in Georgia in particular in public schools and higher institutions to address the need for improved school buildings.	<ul style="list-style-type: none"> <li>ESFTU notes the need to enhance teacher qualifications and retain qualified teachers in service.</li> </ul>	
<b>Germany</b>	<ul style="list-style-type: none"> <li>Better infrastructure in schools and universities is urgently needed. Maintenance of schools is the responsibility of local municipalities and many of them are facing budget restrictions. As a response to the financial crisis the German government has set up an infrastructure package that will support schools and universities with 6.5 billion Euros. GEW and municipalities estimate that there is additional need for more than 40 billion Euros.</li> </ul>	<ul style="list-style-type: none"> <li>Teacher shortages in certain subjects has created competition between teachers among the German “Länder”.</li> <li>Need for more support, better pay and better working conditions for teachers in Germany. Public spending on education in Germany is below OECD average. The pay system for public employees has been thoroughly reformed in recent years and brought a substantial cut in teachers’ pay for newly employed teachers. The teaching profession is no longer attractive for academics.</li> <li>More younger teachers</li> </ul>	<ul style="list-style-type: none"> <li>Teacher education</li> </ul>
<b>Ireland</b>	<ul style="list-style-type: none"> <li>At the post-primary level the development of a comprehensive Information Technology system to support administration, teaching and learning.</li> <li>Upgrading facilities at the post-primary level in older schools, particularly for sciences, physical education, art and technology. (The ICT structure in Ireland is poor by EU standards).</li> <li>Need for more schools in areas where there has been an increase in population. (The current crisis may result in delays in the building of schools.)</li> <li>At the higher education level the expansion of research facilities in some institutions. Additional funds to promote innovation especially in</li> </ul>	<ul style="list-style-type: none"> <li>Reduction in the pupil/teacher ratio to support more active teaching. (The ratio has recently increased from 18:1 to 19:1 according to both TUI and ASTI, however ASTI states that in reality class sizes tend to range from 24 to 30+ students per teacher in lower secondary education)</li> <li>Not enough specialist teachers such as guidance counsellors and learning support teachers</li> <li>Additional support for teachers working with special needs students, and for students whose second language is English. Resources for language support teachers have been curtailed to some degree. The provision of resources to support the integration of students with special</li> </ul>	<ul style="list-style-type: none"> <li>Eliminating voluntary contributions from parents for underfunded schools. According to TUI, additional costs (fees, transport, books, and lunches) as a result of cuts in education vary from 1,500 EUR for single child up to 2,690 EUR per year for families with five children,.</li> <li>More attention to professional development of teachers</li> </ul>

Needs Country	Infrastructure	Human Resources	Other
	science and technology. <ul style="list-style-type: none"> <li>Lack of canteens in schools and underfunding of libraries.</li> </ul>	needs has been delayed.	
<b>Italy</b>	<ul style="list-style-type: none"> <li>Restoration of school buildings in more deprived areas, and ensuring that all school buildings conform to provisions on safety.</li> <li>Development of science laboratories and ICT facilities.</li> <li>At higher education level student residencies are needed according to FLC-CGIL.</li> </ul>	<ul style="list-style-type: none"> <li>Reducing short term contracts at all levels</li> <li>Increasing salaries in all education areas</li> </ul>	<ul style="list-style-type: none"> <li>Overall investment of resources in education instead of cutting human and financial resources as is government policy at present.</li> <li>Improving teachers initial and in-service training</li> </ul>
<b>Malta</b>	Some schools need improvement, yet MUT reports that the school infrastructure has significantly improved in the past years with the building of new schools and extensive refurbishment of numerous state schools.	<ul style="list-style-type: none"> <li>Need for more teachers. Shortage of teachers envisioned for the future as more teachers retire than there are being trained.</li> <li>Lack of support staff</li> </ul>	
<b>Moldova</b>	<ul style="list-style-type: none"> <li>Lack of places for children in primary schools</li> <li>Majority of kindergartens are overcrowded, particularly in urban areas</li> <li>Need for investment in school infrastructure which has not been improved since before 1990s.</li> </ul>	<ul style="list-style-type: none"> <li>Increased numbers of teachers. Currently there is a lack of around 2000 teaching personnel. Only 39% of newly specialised teachers began to work in 2008/9. (17% of teachers in 2008 were retired staff who continued teaching).</li> <li>Increased teacher salaries</li> </ul>	
<b>Netherlands</b>	<ul style="list-style-type: none"> <li>Investments in school buildings and repairs are needed. Nearly 1 billion Euros are needed. Funds have been reserved for investment in schools but they are not yet spent in full. (Municipalities are responsible for the investment in primary, secondary and part of vocational education schools.) Poor maintenance of schools has driven financial needs for infrastructural investments up 200 million Euro in secondary education and 600 million for primary education.</li> </ul>	<ul style="list-style-type: none"> <li>More teachers: shortage of 30,000 teachers projected for 2020.</li> <li>AOB states there is a need to invest in human resources before 2012; 622 million Euros are needed in wages and 20 million Euros for more support staff.</li> </ul>	<ul style="list-style-type: none"> <li>More supervision on how public funds are used (currently schools maintain funds)</li> <li>Reversal of cuts in budgets for technical and vocational training – as less students will find internship placements and more will choose to spend more time at schools, the pressure on teachers will increase</li> </ul>
<b>Norway</b>	<ul style="list-style-type: none"> <li>Neglect in the maintenance of public buildings in general and of schools in particular, has been building up a back log for years. Conservative estimates show that it will cost 5-10 billion Euros to put all school buildings in good order. Since 2003 the central</li> </ul>	<ul style="list-style-type: none"> <li>Recruiting qualified teachers in some subjects (e.g. natural sciences), particularly in upper secondary education.</li> <li>Recruitment of qualified teachers in pre-primary school.</li> <li>Reverse the increase in the number of</li> </ul>	

Needs Country	Infrastructure	Human Resources	Other
	<p>government has offered to pay interest for loans to maintain school buildings. This programme will continue.</p>	<p>unqualified support staff employed in schools and pre-primary education. (This is not a direct consequence of the current economic crisis however his tendency will increase if the economic situation in municipalities &amp; districts continues to deteriorate because of the economic crisis. The main underlying problems are weak recruitment into teacher training and the fact that local education authorities adapt to the situation by hiring more unqualified support staff.)</p>	
<b>Poland</b>	<ul style="list-style-type: none"> <li>• Reconstruction of pre-school infrastructure</li> </ul>		<ul style="list-style-type: none"> <li>• Organisation and curricular reform of VET</li> <li>• Elaboration of the lifelong learning programme</li> <li>• Development of professional counselling service and professional training courses for teachers</li> <li>• Elaboration of national professional qualification framework</li> </ul>
<b>Portugal</b>	<ul style="list-style-type: none"> <li>• Improvement of school buildings. There is a National Plan to rebuild the existing schools or build new schools.</li> </ul>		
<b>Russian Federation</b>	<ul style="list-style-type: none"> <li>• Modernisation of school equipment</li> </ul>	<ul style="list-style-type: none"> <li>• Need more specialised teachers to overcome shortages of, for example, foreign language and mathematics teachers.</li> <li>• More younger teachers.</li> </ul>	
<b>Spain</b>	<ul style="list-style-type: none"> <li>• Improving the provision of Vocational Education and Training</li> </ul>	<ul style="list-style-type: none"> <li>• Increasing the number of posts in Early Childhood Education</li> <li>• Supporting teachers who focus on the diversity of students</li> </ul>	
<b>Sweden</b>		<ul style="list-style-type: none"> <li>• Employment of more support staff</li> </ul>	
<b>Switzerland</b>	<ul style="list-style-type: none"> <li>• Schools differ greatly as to the levels of equipment (i.e. computers). The financial resources (i.e. for building new gymnasias) are often addressed in the villages or cities. (Therefore difficult to summarise for the country as a whole)</li> </ul>	<ul style="list-style-type: none"> <li>• More teachers needed, particularly teachers in specialised subjects (mathematics and natural sciences) in secondary schools. In the coming years, Switzerland will face a loss of teachers.</li> <li>• More therapeutic pedagogy staff.</li> </ul>	<ul style="list-style-type: none"> <li>• Improved education degrees for teachers. LCH pushes for all teachers to have a Masters degree and a complementary salary.</li> </ul>



Needs	Infrastructure	Human Resources	Other
Country			
		<ul style="list-style-type: none"> <li>• Reduction in the number of compulsory teaching hours. Compulsory hours for teacher at the primary level amount to 30 hrs a week. The situation is unsustainable considering the increase in administrative and additional tasks for teachers.</li> </ul>	
U.K.	<ul style="list-style-type: none"> <li>• NUT points to the need to rebuild primary schools</li> </ul>	<ul style="list-style-type: none"> <li>• Continue remodelling the school workforce in order to reduce teacher and head-teacher workload in order that they focus on core responsibilities.</li> <li>• Government's 2020 Children's and Young Peoples Workforce Strategy seeks to develop skills and capacity of the workforce as a whole.</li> <li>• Retention of teaching staff.</li> </ul>	<ul style="list-style-type: none"> <li>• Funding for high quality continuing professional development of teachers</li> <li>• Challenges will need to be addressed concerning reforms to the curriculum and qualifications systems.</li> </ul>

## 2.1.2 North America and Caribbean

In the USA, according to NEA, salaries, benefits, construction, maintenance, and operations in education are facing cuts. Between 500,000 to 600,000 jobs, possibly more, are potentially at risk. Most state education systems are unable to fully fund their existing programs. Funding was tight before the current economic recession began, and the shortfall has worsened dramatically in recent months. Special education programs and facilities are especially hard-hit. With the loss of resources, special education programs will have to be cut to preserve basic education programs.

In Canada, according to CAUT funding for higher education and research is to be reduced over the next three years, and a hiring freeze will take place at many colleges and universities. Both CTF and CSN (active in higher education in the Quebec province) reported that the education system in Canada had not been confronted with cuts. CTF suggested that previous cuts have been absorbed by fewer repairs in infrastructure.

In the Commonwealth of Dominica, Jamaica and Nevis the education systems have not been confronted with cuts because of the global economic crisis, but in Jamaica the government has placed a freeze on auxiliary fees paid by parents.

Needs	Infrastructure	Human Resources	Other
Country			
<b>Canada</b>	<ul style="list-style-type: none"> <li>• Increased maintenance of universities (Deferred maintenance estimated to be over \$6 billion).</li> <li>• New research and classroom facilities and equipment</li> <li>• Need to repair and upgrade schools across the country (although needs differ by region).</li> </ul>	<ul style="list-style-type: none"> <li>• Growing demand for higher education increases need for more higher education teachers. (Currently universities and colleges are responding by hiring part-time and fixed-term staff at low pay rates and without job security)</li> <li>• Need for additional support and specialised staff</li> </ul>	<ul style="list-style-type: none"> <li>• CAUT reports a need for increased research funding and core operating grants for higher education institutions.</li> </ul>
<b>Commonwealth of Dominica</b>	<ul style="list-style-type: none"> <li>• Schools should be more student and teacher friendly. For example, the schools that are presently being constructed are built without halls. The architecture of schools does not help to mitigate instances of violence.</li> </ul>	<ul style="list-style-type: none"> <li>• More appointment of qualified teachers both in primary and secondary schools.</li> <li>• A career path for teachers is urgently needed.</li> <li>• Specialist teachers in the sciences and psychology are necessary.</li> </ul>	<ul style="list-style-type: none"> <li>• More opportunities and resources to support co-curricular activities such as swimming, dance, music (theory and practice).</li> </ul>
<b>Jamaica</b>	<ul style="list-style-type: none"> <li>• Upgrading and repair of school buildings</li> <li>• Construction of new buildings to accommodate more students and reduce overcrowding</li> </ul>	<ul style="list-style-type: none"> <li>• Additional teachers needed to reduce class sizes</li> <li>• More support staff are needed such as school social workers, psychologists.</li> <li>• Additional education officers to properly supervise the system and schools</li> </ul>	
<b>USA</b>	<ul style="list-style-type: none"> <li>• Badly needed maintenance and repairs of facilities are being postponed for an unknown period of time. The average school building in the U. S. is already more than 40 years old. According to the American Society of Civil Engineers' 2009 Report Card, "Spending on the nation's schools grew from \$17 billion in 1998 to a peak of \$29 billion in 2004. However, by 2007 spending fell to \$20.28 billion. No comprehensive, authoritative nationwide data on the condition of America's school buildings has been collected in a decade. The National Education Association's best estimate to bring the nation's schools into good repair is \$322 billion." (\$322 billion was the estimate in 2000.)</li> </ul>	<ul style="list-style-type: none"> <li>• Information is scanty at best. Most state systems are facing projected shortfalls for next year. There are very few reliable statistics available because of the immediacy of the economic crisis. Estimates of teacher layoffs, however, range from 500,000 to 600,000 jobs lost overall.</li> <li>• Support staff positions are also in jeopardy, but little statistical information is available on how many are expected to lose their jobs.</li> </ul>	

## 2.1.3 Latin America

In Brazil and in Chile, the education system has not been confronted with cuts as yet.

In Costa Rica, ANDE noted that there have been cuts in investment in education.

In Nicaragua, according to CTGEN-ANDEN cuts have taken place in maintenance (running costs, energy consumption) and administration (telephone, travel, office equipment). An administrative hiring freeze has been implemented, and working hours of offices in the Ministry of Education have been cut. Schools have been exempted from these measures.

In Peru, according to SUTEP, a budget cut of 2.8% to 3% for education has been implemented. Despite the redesigning of the curriculum, and the printing of new textbooks, teachers are still working with the old textbooks. The goals set out for teacher training have not been met in full. Additionally, the \$300 that is intended to be spent annually for each child is far below that which is provided in other Latin American countries. Teacher salaries and pensions have been frozen, despite the doubling, and in some cases tripling, of the cost of living. It is estimated that more than 1,000 schools are without teachers. In 2008, 1,385 classes were without teachers.

Needs	Infrastructure	Human Resources	Other
<b>Country</b>			
<b>Brazil</b>	<ul style="list-style-type: none"> <li>• Suitable school buildings that meet needs of the students (there are schools at risk)</li> <li>• equipment and facilities</li> </ul>	<ul style="list-style-type: none"> <li>• Of a total of 2,500,000 teachers, 300,000 do not have the relevant qualifications, and a further 300,000 teachers are trained in fields unrelated to the subjects that they teach.</li> </ul>	
<b>Chile</b>	<ul style="list-style-type: none"> <li>• Some schools lack space for recreation facilities, for physical activities and work spaces for teachers</li> <li>• There has, however, been a major effort to improve school facilities</li> </ul>	<ul style="list-style-type: none"> <li>• Need to minimise teachers workload and provide professional support</li> <li>• Surplus of teachers in some subjects and in other subjects a deficit. This is due to a lack of regulation by the state of teacher education, which is regulated by market competition.</li> </ul>	
<b>Costa Rica</b>	<ul style="list-style-type: none"> <li>• Construction of classrooms, sanitary facilities, libraries, provision of desks</li> <li>• General maintenance of schools and colleges</li> </ul>	Increased appointment of teachers and professors. Some are on a part-time basis. (There are serious errors in appointments, making two appointments for the same position. Also there is political interference in the appointment of teachers.)	<ul style="list-style-type: none"> <li>• Lack of adequate technology resources (computers, TVs, etc) blackboards, books</li> </ul>
<b>Nicaragua</b>	<ul style="list-style-type: none"> <li>• repairs in 3000 schools</li> <li>• provision of drinking water facilities, and electricity mainly in rural areas</li> <li>• construction of new schools</li> </ul>		<ul style="list-style-type: none"> <li>• Despite the increase in the budget of the Ministry of Education in the last three years, greater financial resources are needed.</li> </ul>

Needs	Infrastructure	Human Resources	Other
<b>Country</b>			
<b>Peru</b>	<ul style="list-style-type: none"> <li>• There is a need for additional schools across the country. According to figures from the Ministry of Education there are 41,000 schools of which only half are in suitable conditions. More than 5500 school buildings have collapsed, putting lives at risk.</li> <li>• Many schools lack basic services and materials.</li> </ul>	<ul style="list-style-type: none"> <li>• More teachers are needed: In urban areas, some schools have overcrowded classrooms with a student/teacher ratio of 50:1.</li> <li>• 27% of schools have teachers teaching students from several grades at the same time.</li> </ul>	<ul style="list-style-type: none"> <li>• ICT access is too limited, only 23% of students have Internet access.</li> </ul>

## 2.1.4 Africa

In South Africa, Togo, Zambia, and the Republic of Congo, unions reported that the education systems have not yet been faced with cuts because of the global financial and economic crisis.

While SNAT in Swaziland did not respond to the survey (and is also not included in the total responses), they reported that the government of Swaziland has revoked its commitment to introduce Free Primary Education in 2009, as stated in the country's constitution. The government claims not to have enough funding to make primary education free, despite having introduced free textbooks and stationary. More classrooms need to be built, and more teacher trained.

Needs	Infrastructure	Human Resources	Other
<b>Country</b>			
<b>Republic of Congo</b>	<ul style="list-style-type: none"> <li>• Improvement of school infrastructure, particularly in larger cities. New classrooms are needed considering the large class sizes (60 to over a 100 students per class) in primary schools and at university. (State funding of schools is very limited)</li> <li>• Urgent need for school equipment and facilities: FETRASSEIC reports that there are still students in primary school who sit on the floor and teachers without an office.</li> <li>• Need for facilities in schools such as libraries, laboratories.</li> </ul>	<ul style="list-style-type: none"> <li>• More teachers are needed: deficiency of teachers at all levels, overcrowding of classrooms.</li> <li>• Need for teacher training</li> <li>• Need for increased teacher salaries</li> </ul>	
<b>South Africa</b>	<ul style="list-style-type: none"> <li>• SADTU reports a shortage of classrooms, school buildings, labs, libraries, and sport infrastructure.</li> <li>• Additionally SADTU underlines that the education remains divided along lines of race and social class, which is reflected in the school infrastructure.</li> </ul>	<ul style="list-style-type: none"> <li>• SADTU points out that historically poor schools lack the support staff which they need.</li> <li>• More teachers are needed across the country as a result of increasing teacher shortages; annual attrition is approx. 18,000 whilst only 6,000</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of teacher training and support</li> </ul>

Needs	Infrastructure	Human Resources	Other
Country			
	These issues need to be addressed.	new teachers graduate per annum.	
<b>Togo</b>	<ul style="list-style-type: none"> <li>• Reconstruction of school buildings</li> <li>• facilities such as desks, and materials such as books</li> </ul>	<ul style="list-style-type: none"> <li>• Around 6,000 teachers at all levels of education are needed. In general. Togo has recruited new teachers, 9,192 of them being un-qualified (auxiliary) however, education (according to the union FESEN) is not affected by the crisis.</li> </ul>	
<b>Zambia</b>	<ul style="list-style-type: none"> <li>• Need for more classrooms in primary and secondary schools</li> </ul>	<ul style="list-style-type: none"> <li>• Needs for more teachers particularly in rural areas</li> </ul>	<ul style="list-style-type: none"> <li>• More teaching and learning materials (currently these facilities are inadequate)</li> </ul>

## 2.1.5 Asia/Pacific

In the Asia/Pacific region, Australia, Tonga, New Zealand, Mongolia, Japan and Taiwan are facing budget cuts in education as well as other new measures, such as reductions in salaries and allowances for teachers in Japan, and the halting of initiatives to reduce the pupil/teacher ratio in New Zealand.

Tonga is facing general cuts in education, mainly because the budget depends on local revenues and overseas donations.

In Australia there have been no cuts, but according to an AEU report, based on the Rudd Government's May 2008 Budget, the Commonwealth recurrent funding for public schools was projected to be cut in real terms to 33.8% by 2011-12. A subsequent report shows that the new funding measures will turn around the projected cut in real terms and that the public school share of total Commonwealth funding to public and private schools is now projected to increase to 37.1% by 2011-12. The new funding package was welcomed as it represented the first serious investment in public education in over a decade, but these increases have to be kept in perspective as the new funding will still be less than the funding the Commonwealth will provide to guarantee recurrent grants to private schools.

In Mongolia there was a significant education budget cut in 2008, and another 20% reduction is planned for 2009. Teachers and support staff salaries were frozen and will be cut further.

In Taiwan the annual education budget for 2009 has decreased. In 2008, the government diverted around \$22.7 million for higher education in order to stimulate economic growth. Although this amount has been returned into the annual education budget for 2009, the total amount of the budget is only slightly higher than the statutory minimum<sup>6</sup> and is comparatively lower than in previous years. According to NTA, the Taiwan government has also introduced a controversial 'prize' awarded

<sup>6</sup> According to Taiwan legislation, the annual education budget should exceed at least 21.5% of the average of national net income in the preceding three years.

for school merging in order to make education expenditure ‘more efficient’ for schools with small student populations. NTA states that the government fails to provide aid to students, particularly in rural areas.

In Korea and the Philippines the education systems have not been confronted with new cuts as a result of the global financial and economic crisis.

Needs	Infrastructure	Human Resources	Other
<b>Country</b>			
<b>Australia</b>	<ul style="list-style-type: none"> <li>• (See text below table: recent \$14.7 billion investment into public and private school infrastructure. Need for investment into public schools has been necessary for years.)</li> </ul>	<ul style="list-style-type: none"> <li>• Quality teaching, professional pay and the resources to provide them are necessary to improve public schools and outcomes for students.</li> <li>• Additional funds allocated fairly are required to resource our public schools</li> <li>• Ensure that teachers meet professional standards of quality teaching. (In a national survey of beginning teachers, the AEU found that nearly half did not believe they would be teaching in public systems in 10 years time. Their principal concerns were excessive workload and class sizes, inadequate pay and restricted career options.)</li> </ul>	<ul style="list-style-type: none"> <li>• Increased funding by the Federal and state/territory governments is required to raise salaries and to address issues like class sizes, workload, tenure, support staff, professional development and school infrastructure in a comprehensive improvement plan.</li> <li>• Increased funding for Aboriginal students.</li> </ul>
<b>Japan</b>	<ul style="list-style-type: none"> <li>• Improvement of school infrastructure to be earthquake resistant.</li> </ul>	<ul style="list-style-type: none"> <li>• Increasing the number of teachers and support staff.</li> </ul>	
<b>Korea</b>	<ul style="list-style-type: none"> <li>• More classrooms suited to subject requirements</li> <li>• Curriculum related study materials</li> </ul>	<ul style="list-style-type: none"> <li>• Increasing education support staff</li> <li>• More authority for principals of schools</li> </ul>	<ul style="list-style-type: none"> <li>• Improved teacher training and development of a Master’s degree programme for teachers</li> <li>• Introducing sabbatical leave programs for teachers</li> <li>• Securing stability of educational finances</li> <li>• Decrease private investments</li> <li>• Reforming college entrance examination system</li> </ul>
<b>Mongolia</b>	<ul style="list-style-type: none"> <li>• More schools are needed in the capital.</li> <li>• Heating and sanitation facilities (toilets, sinks) need to be increased in schools.</li> <li>• In rural areas dormitory facilities are needed to improve living conditions of</li> </ul>	<ul style="list-style-type: none"> <li>• More teachers needed to reduce class sizes in suburbs.</li> </ul>	<ul style="list-style-type: none"> <li>• Curriculum development (curricula guides and handbooks for teachers), team</li> </ul>

Needs	Infrastructure	Human Resources	Other
Country			
	<p>children from herder's families.</p> <ul style="list-style-type: none"> <li>To improve pre-school enrolment more kindergartens need to be built.</li> </ul>		<p>working skills training for teachers. The education system in Mongolia is in transition from 10 years of schooling to 12.</p> <ul style="list-style-type: none"> <li>Principals need skills training to manage school.</li> <li>Housing for teachers and support staff (this is significant problem in Mongolia).</li> </ul>
<b>New Zealand</b>	<ul style="list-style-type: none"> <li>New school buildings and renovations for a large number of old schools</li> <li>ICT upgrading</li> </ul>	<ul style="list-style-type: none"> <li>More secondary teachers</li> <li>More secondary teacher support positions and support staff.</li> <li>Improved salaries for both secondary teachers and support staff.</li> </ul>	<ul style="list-style-type: none"> <li>Improvements in resources for professional development</li> <li>Operations funding improvements.</li> </ul>
<b>Philippines</b>	<ul style="list-style-type: none"> <li>Facilities such as laboratories, and computer rooms</li> <li>Study areas for students</li> </ul>	<ul style="list-style-type: none"> <li>Increased salaries for teachers</li> </ul>	
<b>Taiwan</b>	<ul style="list-style-type: none"> <li>Urgent need for repair and improvement of school buildings to withstand natural disasters such as earthquakes: of 735 primary and lower-secondary schools, 21% are not resistant and 61% are more than 30 years old.</li> <li>Equipment such as computers, overhead projectors. (According to NTA, local governments claim that they are unable to purchase such equipment due to central government budget cuts).</li> </ul>	<ul style="list-style-type: none"> <li>Increase number of working teachers: average class sizes are 29 pupils per class in primary school, and 34 pupils per class in lower-secondary school.</li> </ul>	
<b>Tonga</b>	<ul style="list-style-type: none"> <li>Public investment in infrastructure.</li> </ul>	<ul style="list-style-type: none"> <li>More teachers: pupil/teacher ratio is currently around 40:1 or higher.</li> </ul>	

## 2.2 Needs in education: Infrastructure and Human Resources

In this section tables for each region provide an overview of the infrastructure and human resource needs in each region (sub-divided into country needs).

### 2.2.1 Europe

The following table gives an overview of the education system needs in different European countries, divided broadly into infrastructure and human resource needs. In the majority of European countries there exists the need to renovate or reconstruct school buildings that are old or where the facilities need to be improved or expanded. In a number of countries the need for improved and modern school equipment and facilities, in particular school laboratories, libraries, sports and music facilities, and ICT infrastructure were highlighted by unions. Overcrowding in classrooms in terms of space, were additionally mentioned by a number of unions.

In terms of human resources the common need across the large majority of European countries was more teachers across all levels, particularly in countries with high student/teacher ratios, including Finland and Ireland. Teacher shortages in particular subject areas (sciences and maths) and specialist teachers (languages, therapeutic, guidance counsellors) are needed in Germany, Ireland, Norway, the Russian Federation and Switzerland. In many countries, including Georgia, Germany, Malta, Moldova, the Netherlands, and the U.K., unions consider that teacher qualifications, salaries and working conditions (workload) need to be improved to make the teaching profession more attractive to newly qualified teachers and to retain in service those already teaching. In Spain and Norway unions mentioned the need for staff in early childhood education.

Enhancing opportunities for professional development (pre and in-service training) was noted as a necessity by unions in Finland, Germany, Ireland, Italy, Poland, Switzerland and the U.K.

According to NASUWT, in the U.K., the education system has seen a significant increase in overall investment since 1997. Policy debates have tended to centre on the means by which state funding of education is distributed rather than on overall levels of investment.

ESFTU in Georgia pointed to the unstable political situation in the country, and the frequent changes in posts in the Ministry of Education that interfere with developments in the education system.

Cyprus did not comment on needs in infrastructure or human resources.

## 2.2.2 North America and Caribbean

CTF in Canada reports that currently there are no pay or pension reductions and the government is seeking to prevent layoffs through longer term agreements.

## 2.2.3 Latin America

SUTEP in Peru reports that there exists an excess of unemployed teachers in the country; 2,000,000 graduate teachers are without jobs. At the same time, there are around 2,250,000 children outside of the education system in Peru, of whom roughly 130,900 are indigenous children aged between 3 to 16 years. Around 35,000 children repeat a year at secondary school. Approximately 14% of the population in Peru is analphabetic.



Needs	Infrastructure	Human Resources	Other
Country			
<b>Brazil</b>	<ul style="list-style-type: none"> <li>Suitable school buildings that meet needs of the students (there are schools at risk)</li> <li>equipment and facilities</li> </ul>	<ul style="list-style-type: none"> <li>Of a total of 2,500,000 teachers, 300,000 do not have the relevant qualifications, and a further 300,000 teachers are trained in fields unrelated to the subjects that they teach.</li> </ul>	
<b>Chile</b>	<ul style="list-style-type: none"> <li>Some schools lack space for recreation facilities, for physical activities and work spaces for teachers</li> <li>There has, however, been a major effort to improve school facilities</li> </ul>	<ul style="list-style-type: none"> <li>Need to minimise teachers workload and provide professional support</li> <li>Surplus of teachers in some subjects and in other subjects a deficit. This is due to a lack of regulation by the state of teacher education, which is regulated by market competition.</li> </ul>	
<b>Costa Rica</b>	<ul style="list-style-type: none"> <li>Construction of classrooms, sanitary facilities, libraries, provision of desks</li> <li>General maintenance of schools and colleges</li> </ul>	Increased appointment of teachers and professors. Some are on a part-time basis. (There are serious errors in appointments, making two appointments for the same position. Also there is political interference in the appointment of teachers.)	<ul style="list-style-type: none"> <li>Lack of adequate technology resources (computers, TVs, etc) blackboards, books</li> </ul>
<b>Nicaragua</b>	<ul style="list-style-type: none"> <li>repairs in 3000 schools</li> <li>provision of drinking water facilities, and electricity mainly in rural areas</li> <li>construction of new schools</li> </ul>		<ul style="list-style-type: none"> <li>Despite the increase in the budget of the Ministry of Education in the last three years, greater financial resources are needed.</li> </ul>
<b>Peru</b>	<ul style="list-style-type: none"> <li>There is a need for additional schools across the country. According to figures from the Ministry of Education there are 41,000 schools of which only half are in suitable conditions. More than 5500 school buildings have collapsed, putting lives at risk.</li> <li>Many schools lack basic services and materials.</li> </ul>	<ul style="list-style-type: none"> <li>More teachers are needed: In urban areas, some schools have overcrowded classrooms with a student/teacher ratio of 50:1. 27% of schools have teachers teaching students from several grades at the same time.</li> </ul>	<ul style="list-style-type: none"> <li>ICT access is too limited, only 23% of students have Internet access.</li> </ul>

## 2.2.4 Africa

Needs	Infrastructure	Human Resources	Other
Country			
<b>Republic of Congo</b>	<ul style="list-style-type: none"> <li>Improvement of school infrastructure, particularly in larger cities. New classrooms are needed considering the large class sizes (60 to over a 100 students per class) in primary schools and</li> </ul>	<ul style="list-style-type: none"> <li>More teachers are needed: deficiency of teachers at all levels, overcrowding of classrooms.</li> <li>Need for teacher training</li> <li>Need for increased teacher</li> </ul>	

Needs	Infrastructure	Human Resources	Other
Country			
	<p>at university. (State funding of schools is very limited)</p> <ul style="list-style-type: none"> <li>Urgent need for school equipment and facilities: FETRASSEIC reports that there are still students in primary school who sit on the floor and teachers without an office.</li> <li>Need for facilities in schools such as libraries, laboratories.</li> </ul>	salaries	
<b>South Africa</b>	<ul style="list-style-type: none"> <li>SADTU reports a shortage of classrooms, school buildings, labs, libraries, and sport infrastructure.</li> <li>Additionally SADTU underlines that the education remains divided along lines of race and social class, which is reflected in the school infrastructure. These issues need to be addressed.</li> </ul>	<ul style="list-style-type: none"> <li>SADTU points out that historically poor schools lack the support staff which they need.</li> <li>More teachers are needed across the country as a result of increasing teacher shortages; annual attrition is approx. 18,000 whilst only 6,000 new teachers graduate per annum.</li> </ul>	<ul style="list-style-type: none"> <li>Lack of teacher training and support</li> </ul>
<b>Togo</b>	<ul style="list-style-type: none"> <li>Reconstruction of school buildings</li> <li>facilities such as desks, and materials such as books</li> </ul>	<ul style="list-style-type: none"> <li>Around 6,000 teachers at all levels of education are needed. In general. Togo has recruited new teachers, 9,192 of them being un-qualified (auxiliary) however, education (according to the union FESEN) is not affected by the crisis.</li> </ul>	
<b>Zambia</b>	<ul style="list-style-type: none"> <li>Need for more classrooms in primary and secondary schools</li> </ul>	<ul style="list-style-type: none"> <li>Needs for more teachers particularly in rural areas</li> </ul>	<ul style="list-style-type: none"> <li>More teaching and learning materials (currently these facilities are inadequate)</li> </ul>

## 2.2.5 Asia/Pacific

In June 2008 the AEU in Australia commissioned a report into public education infrastructure, 'Rebuilding Public Schools 2020', which revealed that investment for buildings and facilities in Australian public schools falls short by around \$2 billion annually when compared to the level of investment in private schools. The report found that during 2002-2005, public schools were under-funded to the value of \$8.4 billion in terms of capital investment. If this amount were distributed evenly between all public schools in 2005 it would have meant an extra \$1.2 million for each and every public school in Australia. Further research [December 2008] also highlighted the fact that significantly less is being spent on public school buildings and facilities in Australia than in other major nations. Between 2002 and 2006, Australian governments spent on average, \$1000 less per student than Britain and the United States. If Australian governments invested as much per student in public schools over the five year period as the UK and USA, each public school would have received an additional \$1.5 million in funds to improve buildings, facilities and equipment. In February 2009 the Australian government announced a \$14.7 billion injection into school [both public and private] infrastructure.

Additionally, in August 2008 the AEU in Australia commissioned a report into schools funding, which revealed that based on the Rudd Government's May 2008 Budget, Commonwealth funding for public schools was projected to be cut in real terms to 33.8% by 2011-12. The Report recommended the allocation of an additional \$1.6 billion per year to restore the public school share of Commonwealth recurrent funding to 43.1%. A subsequent report by Dr McMorrow [December 2008] 'Updating the evidence: The Rudd Government's intentions for schools', examines funding changes made since the May Budget, most notably the package of additional funding, \$2.8 billion over five years for public schools. His analysis shows that the new funding measures will turn around the projected cut in real terms and that the public school share of total Commonwealth funding to public and private schools is now projected to increase to 37.1% by 2011-12. The COAG funding package was welcome as it represented the first serious investment in public education in over a decade but these increases have to be kept in perspective as the new funding is still less than the funding the Commonwealth will provide to guarantee above-formula recurrent grants to private schools.

A majority of Aboriginal students attending public schools in Australia continue to miss out on adequate funding due to a measure announced by the Federal Government in 2008 which delivers the maximum funding level of 70% of Average Government School Recurrent Costs (AGSRC) to non-government schools in remote areas with significant numbers of Aboriginal students. Public schools educating approximately 90% of Aboriginal students continue to have their funding levels capped at 10% of AGSRC in secondary schools and 8.9% for primary schools, up to 7 times less than for non-government schools.

Needs	Infrastructure	Human Resources	Other
<b>Country</b>			
<b>Australia</b>	<ul style="list-style-type: none"> <li>(See text below table: recent \$14.7 billion investment into public and private school infrastructure. Need for investment into public schools has been necessary for years.)</li> </ul>	<ul style="list-style-type: none"> <li>Quality teaching, professional pay and the resources to provide them are necessary to improve public schools and outcomes for students.</li> <li>Additional funds allocated fairly are required to resource our public schools</li> <li>Ensure that teachers meet professional standards of quality teaching. (In a national survey of beginning teachers, the AEU found that nearly half did not believe they would be teaching in public systems in 10 years time. Their principal concerns were excessive workload and class sizes, inadequate pay and restricted career options.)</li> </ul>	<ul style="list-style-type: none"> <li>Increased funding by the Federal and state/territory governments is required to raise salaries and to address issues like class sizes, workload, tenure, support staff, professional development and school infrastructure in a comprehensive improvement plan.</li> <li>Increased funding for Aboriginal students.</li> </ul>
<b>Japan</b>	<ul style="list-style-type: none"> <li>Improvement of school infrastructure to be earthquake resistant.</li> </ul>	<ul style="list-style-type: none"> <li>Increasing the number of teachers and support staff.</li> </ul>	
<b>Korea</b>	<ul style="list-style-type: none"> <li>More classrooms suited to subject requirements</li> </ul>	<ul style="list-style-type: none"> <li>Increasing education support staff</li> </ul>	<ul style="list-style-type: none"> <li>Improved teacher training and</li> </ul>

	<ul style="list-style-type: none"> <li>Curriculum related study materials</li> </ul>	<ul style="list-style-type: none"> <li>More authority for principals of schools</li> </ul>	<p>development of a Master's degree programme for teachers</p> <ul style="list-style-type: none"> <li>Introducing sabbatical leave programs for teachers</li> <li>Securing stability of educational finances</li> <li>Decrease private investments</li> <li>Reforming college entrance examination system</li> </ul>
<b>Mongolia</b>	<ul style="list-style-type: none"> <li>More schools are needed in the capital.</li> <li>Heating and sanitation facilities (toilets, sinks) need to be increased in schools.</li> <li>In rural areas dormitory facilities are needed to improve living conditions of children from herder's families.</li> <li>To improve pre-school enrolment more kindergartens need to be built.</li> </ul>	<ul style="list-style-type: none"> <li>More teachers needed to reduce class sizes in suburbs.</li> </ul>	<ul style="list-style-type: none"> <li>Curriculum development (curricula guides and handbooks for teachers), team working skills training for teachers. The education system in Mongolia is in transition from 10 years of schooling to 12.</li> <li>Principals need skills training to manage school.</li> <li>Housing for teachers and support staff (this is significant problem in Mongolia).</li> </ul>
<b>New Zealand</b>	<ul style="list-style-type: none"> <li>New school buildings and renovations for a large number of old schools</li> <li>ICT upgrading</li> </ul>	<ul style="list-style-type: none"> <li>More secondary teachers</li> <li>More secondary teacher support positions and support staff.</li> <li>Improved salaries for both secondary teachers and support staff.</li> </ul>	<ul style="list-style-type: none"> <li>Improvements in resources for professional development</li> <li>Operations funding improvements.</li> </ul>
<b>Philippines</b>	<ul style="list-style-type: none"> <li>Facilities such as laboratories, and computer rooms</li> <li>Study areas for students</li> </ul>	<ul style="list-style-type: none"> <li>Increased salaries for teachers</li> </ul>	
<b>Taiwan</b>	<ul style="list-style-type: none"> <li>Urgent need for repair and improvement of school buildings to withstand natural disasters such as earthquakes: of 735 primary and lower-secondary schools, 21% are not resistant and 61% are more than 30 years old.</li> <li>Equipment such as computers, overhead projectors. (According to NTA, local governments claim that they are unable to purchase such equipment due to central government budget cuts).</li> </ul>	<ul style="list-style-type: none"> <li>Increase number of working teachers: average class sizes are 29 pupils per class in primary school, and 34 pupils per class in lower-secondary school.</li> </ul>	
<b>Tonga</b>	<ul style="list-style-type: none"> <li>Public investment in infrastructure.</li> </ul>	<ul style="list-style-type: none"> <li>More teachers: pupil/teacher ratio is currently around 40:1 or higher.</li> </ul>	

## 2.3 Stimulus packages and education

### 2.3.1 Europe

In none of the European countries, except Norway, have governments announced plans to prevent teacher layoffs. In Norway, the government has briefly discussed the need for introducing stronger national standards for teacher/pupil ratios in order to prevent cuts and teacher layoffs by authorities at regional and local level. However, so far there has been no concrete suggestion from the government on this matter. UEN has outlined the need for national standards on several occasions during the last four-five years. However, the central government, in close cooperation with the union, has set up a partnership with all key players in the education sector to enhance the role and status of teachers. The first goal is to increase the number of applicants for teacher training. A number of ambitious goals have been set up for this 5-year project called Gnist (Spark).

In the UK, NASUWT, reports that there are no government plans to prevent teacher layoffs since issues related to the number of teachers recruited or made redundant from schools are not under the direct control of central government bodies, but are matters for individual schools and local authorities. The extent of funding in the system overall, however, clearly has an impact on the number of staff employed in schools. In its public expenditure plans for the period up to 2011, the Government has given a clear commitment to maintaining current levels of investment in the education system although real term growth is expected to be lower than in the previous years.

In Sweden, Lärarförbundet reports that the government plans to increase the grants to municipalities next year. (Teachers' salaries are financed by the municipalities who receive government funds for all activities, including education.) The grants will be specified in the government fiscal policy bill in April 2009.

In Ireland, teachers are facing pay and pension cuts. According to TUI and ASTI, excluding very low income groups, a 1% levy has been imposed on all workers earnings where they are earning up to 100,000 Euro, and a 2% levy applies to earnings over 200,000 Euro. In addition a pension levy is being imposed on the salaries of all public sector workers. This levy is determined according to level of income but teachers will be levied between 5% and 10%. Additionally, according to ASTI, income support to families with small children is to be cut.

The following table provides an overview of which countries in Europe have seen a stimulus package developed by their governments, and if these packages include investments in education (infrastructure and/or human resources). Additionally the table indicates at which levels of education investments are targeted of the stimulus packages (provided they include investments in education). The table also indicates whether the unions were consulted about the government plans concerning the stimulus package.

In Germany there is comparatively remarkable stimulus package, including investment in education, although mainly in school infrastructure. GEW believes that more and continuous public spending both in the infrastructure of schools, universities and other education institutions as well as increased teachers pay is needed. The stimulus package of the German government is considered by GEW to be too small. The package includes tax cuts which will threaten public income for education

in the future. A new constitutional limit on debt spending will put more pressure on public spending and harder cuts can be expected in the next years. This will negatively affects teachers' salaries and education infrastructure and GEW considers that it will lead to increased privatisation in the German education system.

Country	Stimulus package?	Investment in education Infrastructure?	Investment in Human Resources?	Which education levels targeted?	Union consulted?
<b>Austria</b>	Yes	-	-	-	No
<b>Azerbaijan</b>	No	-	-	-	-
<b>Belgium</b>	Yes	Yes	Yes	All levels	Yes
<b>Cyprus</b>	No	-	-	-	-
<b>Denmark</b>	Yes	No	No		
<b>Finland</b>	Yes	Yes	Yes	VET and adult education	Yes
<b>Georgia</b>	Yes			All levels	
<b>Germany</b>	Yes	Yes	Yes	All levels	No
<b>Ireland</b>	No	-	-	-	-
<b>Italy</b>	Yes	No	No	-	-
<b>Malta</b>	No (although there were ad hoc arrangements with entrepreneurs to invest further in the country)			A significant amount of money was invested in retraining of people who lost their jobs	
<b>Moldova</b>	Yes	Yes	Yes	Secondary education; Vocational and adult education.	Yes
<b>Netherlands</b>	Yes	Unknown	Unknown		No
<b>Norway</b>	Yes	-	Yes	Primary education, Secondary education	-
<b>Poland</b>	Yes	No	-	-	No
<b>Portugal</b>	Yes	Yes	-	Early Childhood Education; primary education; secondary education	No
<b>Russian Federation</b>	Yes. No cuts in education budget		No cuts in teachers wages	Early Childhood Education; primary education; secondary education	-

Country	Stimulus package?	Investment in education Infrastructure?	Investment in Human Resources?	Which education levels targeted?	Union consulted?
Spain	No	-	-	-	-
Sweden	Yes	-	-	-	-
Switzerland	Yes	-	-	-	No
UK	Yes	Yes, prioritisation of apprenticeships programme	Yes. Currently the school estate is being renewed as part of the Government's <i>Building Schools for the Future</i> programme and <i>Primary Capital</i> Programme. These programmes aim to address the historic underinvestment in school buildings.	All levels (according to NASUWT) Early Childhood Education (according to NUT)	Yes (NASUWT) No (NUT)

## 2.3.2 North America and Caribbean

In Canada, academic staff at the Royal Military College of Canada, which is operated by the federal government, have had their negotiated salary settlement retracted. Unions have launched a legal challenge against this decision.

In the USA, government plans have been announced to prevent teacher lay-offs. According to NEA, the US congress has passed legislation that will provide an added \$100 billion to education, beyond what was budgeted previously. The primary purpose is to fill in current projected state budget gaps for this year and next. There are mixed messages in the media and other sources regarding the effectiveness of the Stimulus Package. Some analysts predict that the funds will prevent many lay-offs, but there is concern that the stimulus money will not pass through to some states in time to prevent lay-offs.

NEA also believes that teachers are facing pay cuts, and reports that, while little up-to-date information is available regarding the scope of pay cuts and benefit adjustments, there are media reports that contract negotiations will be more difficult in the coming year. Many contracts are negotiated on a state-by-state or district-by-district basis, and data will become available only when new contracts are negotiated.

The following table provides an overview of which countries in North America and the Caribbean have seen a stimulus package developed by their governments, and whether these packages include investments in education (infrastructure and/or human resources). Additionally the table indicates at which levels of education investments are targeted of the stimulus packages (provided they include investments in education). The table also indicates whether the unions were consulted about the government plans concerning the stimulus package.

Country	Stimulus package?	Investment in education Infrastructure?	Investment in Human Resources?	Which education levels targeted?	Union consulted?
Canada	Yes	Yes	-	Higher education; VET and adult education. According to CSN the stimulus package also targets primary and secondary education.	No
Jamaica	Yes (The stimulus package is provided to the private sector through loans at concessionary interest rates)	-	-	-	-
Nevis	No	-	-	-	-
USA	Yes			Primary, secondary and higher education	No

### 2.3.3 Latin America

Country	Stimulus package?	Investment in education Infrastructure?	Investment in Human Resources?	Which education levels targeted?	Union consulted?
Brazil	Yes	-	-	-	-
Chile	Yes	No	No	-	No
Costa Rica	Yes	Yes	-	Primary education	No
Nicaragua	Yes	Yes	-	Primary, Secondary, VET and adult education	Yes

### 2.3.4 Africa

Country	Stimulus package?	Investment in education Infrastructure?	Investment in Human Resources?	Which education levels targeted?	Union consulted?
Republic of Congo	Yes	-	Yes	Early Childhood Education and Primary education	No
South Africa	Yes	Yes	Yes	Primary, Secondary, VET and adult education	Yes



<b>Togo</b>	No	-	-	-	-
<b>Zambia</b>	No	-	-	-	-

## 2.3.5 Asia Pacific

In Mongolia, the government is negotiating a loan from IMF. If so, further cuts not investments are actually expected, as one of the conditions was the cut teachers' bonuses.

In Australia, in February 2009, the Government announced a \$14.7 billion investment in school infrastructure as part of a \$42 billion economic stimulus package. Public schools will receive around 70% of these new funds for maintenance and upgraded facilities which will assist significantly in developing much needed modern learning environments.

Country	Stimulus package?	Investment in education Infrastructure?	Investment in Human Resources?	Which education levels targeted?	Union consulted?
<b>Australia</b>	Yes	-	Yes	Primary and Secondary education	No
<b>Japan</b>	Yes, but it does not include investments in education.	-	-	Early childhood education, primary and higher education	No
<b>Korea</b>	Yes	Yes	-	Secondary education	No
<b>Mongolia</b>	No	-	-	-	-
<b>New Zealand</b>	Yes	Yes (but not a direct consequence of the recession)		Primary and secondary levels	
<b>Philippines</b>	Yes	Yes	Yes	Primary and Secondary education	No
<b>Taiwan</b>	Yes	No	No	-	-
<b>Tonga</b>	No	-	-	-	-

## 2.4 Official Development Assistance and Education

The following table shows for all countries whether there have been decreases in Official Development Assistance (ODA) from or to countries. In Ireland, Italy, and Japan has there been a decrease of ODA from these countries. NTA in Taiwan is expecting that ODA from Taiwan will decrease. ODA receiving countries have not reported a decrease.

Country	Donor of ODA for education?	If yes, announced decrease in ODA?	Recipient of ODA for education?	If yes, announced decrease to ODA?
Australia	Yes	No		
Austria	Yes	No		
Canada	Yes	No, recent statistics show a slight increase in ODA budgeting. Yes, according to CSN.		
Republic of Congo			Yes	No
Germany	Yes	No		
Ireland	Yes	Yes		
Italy	Yes	Yes		
Jamaica			Yes	No
Japan	Yes	Yes		
Korea	Yes	No		
New Zealand	Yes	No		
Norway	Yes	No		
Sweden	Yes	No		
Taiwan	Yes	Yes (expected).		
Togo			Yes	No
UK	Yes	No		
Zambia			Yes	No

## 2.5 Unions' proposals and expectations

### 2.5.1 Europe

In Azerbaijan, the union is trying to postpone the introduction of fees for students, but rather to provide scholarships for students (minimal living conditions), and to provide subsidies to education institutions to prevent dismissal of staff members.

In Denmark<sup>7</sup>, according to a number of unions (including BUPL, DLF, DM, FSL, GL, KLF, SL, and DLI), the majority of trade unions and the parliamentary opposition are proposing increased investment in the public sector in general (education, health and social services) as a response to the

<sup>7</sup> The survey was not completed by unions in Denmark, but a short letter was sent to EI by DLF and DLI on behalf of a number of unions in Denmark, including EI member organizations.

global economic crisis. There is a growing shortage of qualified teachers, nurses, and social workers within the public sector, and therefore, several Danish politicians have proposed that workers made redundant in the private sector should be re-educated for jobs in the public sector.

OAJ in Finland is campaigning against “temporary lay-offs” of teachers by municipalities, which is becoming a more common practice as municipalities try to save their expenditure budgets. It also argues that education is needed for investment in the future, and that better skills and knowledge will help to recover from the crisis.

In Georgia, ESFTUG proposes establishing cooperation between the union and the government. As yet there exists no social partnership. Similarly in Spain, CSI-CSIF is calling for a social dialogue to find joint solutions. Additionally they propose increased investment in infrastructure development.

In Germany, both VEB and GEW are advocating for investments not only in infrastructure but in teachers as well. GEW, in particular, is requesting more and sustainable public spending in infrastructure and redistribution of wealth (higher taxes for people with higher incomes). GEW believes that more and continuous public spending both in infrastructure of schools, universities and other education institutions, as well as increased teachers’ pay, is needed.

In Ireland, ASTI has lobbied and campaigned hard against cuts in spending on education. TUI in Ireland, has endorsed elements of a plan set out by the Irish Congress of Trade Unions which places the emphasis on protecting jobs, realistic and equitable tax increases, investment in skills upgrading (education and training) and improving competitiveness. TUI is working together with management and parent bodies to create public awareness about the cutbacks in education and lobbying the government for more rational and thought-out decisions with respect to investment in education, in order to preserve and protect education services for children and young people. Additionally, TUI has engaged in extensive lobbying of politicians (local and national) in government and in opposition parties with regard to investment in, and support for, further and third level education in order that these sectors can respond quickly, in a relevant manner, to the new demands and needs of the new unemployed. TUI has developed a six point plan and presented it to the Minister of Education and Science and members of the opposition parties.

In Italy FLC-CGIL is demanding an increase in funding for education, and the development of adult education and training in order to update skills and competencies.

In Norway, in the light of the tendency of municipalities and districts to cut teacher/student ratios, the union (UEN) has tried to convince the central government that a stronger national standard for a minimum teacher/student ratio is needed. UEN has also advocated the view that some of the government spending plans developed as a consequence of the crisis, should be invested in education. So far the government’s main concern has been to create new jobs for the workers that have been laid off in the private sector, in construction and other industrial sectors.

The government’s new budget proposal for 2009 was published in October 2008. Rather than proposing to cut government spending, the budget proposes to increase public spending to prevent the worst implications of the economic crisis in sectors that are particularly sensitive to market fluctuations. In practice this means that the Norwegian government has proposed to increase its spending in building and maintaining infrastructure, such as railways, roads and governments buildings, including an eight year program to give interest free loans to municipalities and districts to build and

maintain school buildings. The budget also contains proposals to enhance quality in schools. If these proposals are implemented, as proposed, they will create thousands of new jobs for teachers, especially in primary schools. There is, however, a growing tendency that local authorities cut budgets, so that less teaching positions are filled. UEN expects that the public sector, education included, will be more attractive to workers made redundant in the private sector as a result of the financial crisis. Many teachers are now working outside the education system. Thus the crises might have a positive effect on the education system when it comes to addressing the shortage of qualified teachers. UEN also expects an increase in the number of applicants for teacher education.

In Portugal, FNE has stated that the budget for education should be reinforced and not cut during this period of economic crisis. FNE defends the position that one of the pillars for the solution of this world crisis is education. The Portuguese Government has announced a package of measures to fight against the crisis. The National Programme for Modernizing Schools framed by the Initiative for Investment and Employment, approved by the Council of Ministers in 13 December 2008, was established to address the economic crisis.

ESEUR in Russia urged the government to maintain current employment levels in education, and to refrain from introducing policies aimed at saving funds rather than investing in human resources.

In Sweden, Lararförbundet is advocating for increased grants to the municipalities, who receive funds for all of their activities, including education. Teachers' salaries are financed by the municipalities. Lararförbundet predicts that in the coming year, due to increased layoffs in the private sector, municipalities will receive less income, which may result in reduced school budgets in the majority of the municipalities.

In Switzerland the union LCH expects, in the worst case scenario, that there will be cuts in expenditure for salaries (human resources generally). The reform projects are preparing a modernisation of the Swiss School System (i.e. better coordination of education across the cantons and a single syllabus for the whole German speaking region).

In the United Kingdom, NASUWT's response to the current economic crisis takes a number of forms. NASUWT, through the UK's Trade Union Centre (TUC) remains closely involved in the national level response of the TUC and the wider trade union movement to the challenges faced by the UK economy. In terms of Government spending priorities beyond the education sector, the NASUWT continues to emphasise the importance of sustaining programmes to tackle poverty, socio-economic exclusion and to promote equality and diversity.

While the governments public sector expenditure programme aims to avoid teacher redundancies, the NASUWT indicates that rising unemployment and falling wage levels can have a serious negative effect on members' household incomes. The union therefore continues to support policies aimed at ensuring that the negative effects of the recession be ameliorated, and that the UK return to positive economic growth within the shortest possible timescale.

NUT in the UK is proposing to maintain education spending at current levels generally, and to increase it in particularly deprived areas in order to bring expenses per students to the level spent on privately educated students.

## 2.5.2 North America and Caribbean

CTF in Canada is proposing that the government continues to recognize education as an investment and keeps a focus on alleviating child poverty as a way to improve the future of the country. CAUT, proposes that federal support to the provinces for higher education and research is increased to proportionally match that announced in the US stimulus package.

In the Commonwealth of Dominica, DAT, proposes that the government takes a serious look into renewing school infrastructure, increasing human resources, and raising the salaries and benefits of teachers.

In the USA, NEA and many of its state affiliates have been active with the federal and state governments in attempting to secure more funding for education. The union's position is that funding for education is an investment in the human capital produced by education, and the returns on that investment will boost economic recovery. State education systems have been terribly underfunded for the last several decades. The cause of this underfunding has been a growing public unwillingness to pay taxes. The result has been dwindling tax revenues from progressive tax sources and increased tax revenues from regressive sources. Revenues from regressive tax sources are inelastic and decline every year. Moreover, they are severely affected by recessions, as the current recession demonstrates. Thus, there is increased pressure on states to cut spending because the current tax revenues are dwindling. Education may account for up to 50% of a state's overall expenditure, so it is a large target for politicians who are under pressure to cut spending. Public education's greatest challenges today are to create a positive public image for education services and to create public willingness to pay for these services through taxes. For decades the federal government has provided revenues for special education programs through its Elementary and Secondary Education Act (ESEA, now known as *No Child Left Behind*). Funding has never reached the levels promised by the federal government since the inception of ESEA. The economic crisis will make matters worse. This will create conflict between legislative requirements and economic reality. Many schools and school districts may face federal revenue cuts because they fail to meet certain "achievement" (test score) benchmarks.

### 2.5.3 Africa

In South Africa, SADTU suggests that their country has been saved from crisis due to conservative credit and monetary policies that have meant little deficit in the budget and have allowed for levels of public spending to be maintained. In education the major problem remains one of equity and raising quality, for which training and resources are needed.

In Zambia, ZNUT, is proposing increased funding for education in general, and in Togo, FESEN, proposes that the government better provide for teachers salaries.

### 2.5.4 Asia Pacific

In Australia, AEU considers it essential that the Government acts to protect jobs and secure investment in every Australian community to ensure stability and guaranteed provision of high quality public services. Fundamental to this is a quality public school in every community in order to ensure that when Australia comes out of the crisis its education system is not worse off than when it began. Investing in public schools is, according to AEU, the most important investment a government can make.

In Mongolia, FMESU is fighting against education budget cuts and teacher salary reductions, but these are part of IMF loan conditions which the government has negotiated. FMESU demands that the government provides information and consults with the union.

JTU in Japan is calling for a Japanese version of the *Green New Deal* policy and a complete reform of educational institutions and medical facilities.

In Korea, KFTA has proposed a new education policy to the government to meet teaching and learning aims; better manage various education curricula, and to raising quality in teaching, and levels of teacher training. KFTA hopes to improve teachers' professionalism and quality public education through improved school facilities and education training. It is hoped that investments in the new education policy can generate employment, and lead to better learning environments for teachers and students.

NZPPTA in New Zealand proposes, as a response to the global economic crisis, increased investment in human resources, particularly in professional development, and increasing the number of secondary teachers in order to reduce class size. Additionally, NZPPTA proposes investment in operations funding and support staff numbers to reduce costs to parent communities and to stimulate spending in local communities.

In the Philippines, TOPPS, is calling for increased salaries for public school teachers.

In Taiwan, NTA is particularly concerned with the future of pension funds, based on research carried out by the union, the pension system is expected to be bankrupt by 2028. The union expects that the global economic crisis will result in this bankruptcy taking place ahead of time. NTA is campaigning to raise public awareness about this problem and monitors government actions on this issue, as well as demanding that the government increases the efficiency of the pension system and is transparent in its dissemination of information. These demands were emphasised by the media and widely supported by the public.

The Taiwanese government has drawn up a project to allow public schools to be operated by the private sector in response to the crisis and a shortage in the education budget. NTA has objected to this plan based on EI's work on Public Private Partnerships; however the government is pursuing it further because of budgetary and business interests. NTA is initiating a public campaign against these plans.

## 2.5.5 Latin America

In Nicaragua, CGTEN-ANDEN, proposes equitable economic measures in the country, and the prevention of international funds from being spent on rescuing banks and financial institutions and diverted from job creation. The Ministry of Education has initiated the implementation of a new curriculum which aims at improving the quality of education in schools. Education in Nicaragua is however being affected by reduced international aid, as a result of the withdrawal of support from cooperating agencies and governments.

In Peru, SUTEP calls for a reform and redesign of the national curriculum, and that the budget for education be no less than 6% of GDP. At the school level, the union proposes that children have the opportunity to attend school for the whole day; that student/teacher ratios are reduced (25 students per class); infrastructure is modernised; and, that students who have dropped out are given an opportunity for a better future through schooling.

SUTEP reports that 52% of Peruvians - some 14 million people – are living on two dollars a day and another 14% - about 4 million people – live in extreme poverty on one dollar a day. Adult illiteracy remains a widespread problem, and around 61% of children suffer from chronic malnutrition, which makes learning extremely difficult. Poverty needs to be tackled, and not abandoned during this crisis.

CNTE in Brazil calls for an increase in the percentage of GDP spent on public education (between 7% and 10%), and ensuring the public sector works, by setting a minimum wage floor and enhancing career opportunities. In Brazil there is a lack of teachers in several subjects, including physics, chemistry, mathematics and biology. While the national policy for teacher training aims to fill this gap, this requires a joint commitment of all of the federal states, as well as central financial support. The recruitment of part-time teachers to reduce costs is becoming more common in many states, but impacts negatively on the quality of education provided. CNTE argues for tenured positions for teachers.

In Costa Rica, ANDE's position is similar to that of CNTE in Brazil. It calls for an increased education budget to achieve a target for spending on education of 6% of GDP. Current spending is only 4.5% of GDP. ANDE reports that much of what is planned in social projects to improve education is not implemented.

## **Annex**

### **Survey: The Global Economic Crisis and its Impact on Education**

Cf. next page

## Survey

### *The Global Economic Crisis and its impact on Education*

1. a Has your education system been confronted with new cuts because of the global financial and economic crisis?

Yes  No

1. b If yes, in which areas?

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2. What are your education system needs?<sup>1</sup> *Please summarise.*

2.1 Infrastructure

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2.2 Human resources (teachers, principals, support staff)

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3.3 Other, namely

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4. a Are there government plans to prevent teacher layoffs?

Yes  No

*If you replied no, please go to question 4.d*

4. b What are these plans? *Please describe briefly.*

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4. c Have these plans been negotiated with your union?

Yes  No

4. d Are teachers facing pay or pension cuts?

Yes  No

*If yes, please give brief details*

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<sup>1</sup> Please attach any of your union papers/documents outlining these needs. Kindly send as brief summaries, if possible in an EI official language).



5. a Has the government announced economic stimulus packages in your country?

Yes  No

*If you replied no, please go to question 7*

5.b If yes, do these financial stimulus packages include investments in education, for example in human resources and/or infrastructure?

Yes, in human resources

Yes, in infrastructure

Other, namely

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No

*If you replied No please go to question 7*

5.c Has your union been consulted on these plans?

Yes  No

6. At which level of education are these investments mainly concentrated?

6.1 In pre-primary/early childhood education

6.2 In primary education

6.3 In secondary education

6.4 In higher education

6.5 In vocational and adult education

7. What is your union proposing, in your country, in response to the global economic crisis? *Please describe below.*

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8.a Is your country a donor of Official Development Assistance (ODA) for education?

Yes  No

*If you replied Yes, please go to question 8.b, if you replied No, go to question 9a.*

8. b Has there been any announced decrease in ODA from your country for education and the achievement of the MDGs?

Yes  No

9. a Is your country a recipient of Official Development Assistance for education?

Yes  No

9.b Has there been any announced decrease in ODA to your country for education and the achievement of the MDGs?

Yes  No

10. Please use this space to provide any further information. As circumstances vary among countries, please send us any relevant information which does not fit the format of this questionnaire. We would also welcome your comments on the emphasis of your governments' response to the financial and economic crisis. For example, what is the overall effect on education and the public sector? What challenges does your education system face?

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Please give the name, position, organisation and country of the person who completed this questionnaire:

Name and Position \_\_\_\_\_  
Organization \_\_\_\_\_  
Country \_\_\_\_\_

Please return this questionnaire by 9<sup>th</sup> March 2009 to Mireille de Koning, Professional Assistant, EI Research Unit, at: [mireille.dekoning@ei-ie.org](mailto:mireille.dekoning@ei-ie.org), or contact us for further inquiries at +32 2 224 0658.

**Thank you very much for your cooperation!**