TRANSNATIONAL TEACHER MOBILITY: PATTERNS, QUALITIES, INSTITUTIONAL ACTORS AND POLICY IMPLICATIONS

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by

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Abstract

Over the past two decades, teaching has been subject to several global trends including the long-term erosion of teacher pay, the global standardization of core curriculum, and declines in entering teacher test scores in a wide range of nations. Increasingly we see that teacher shortages have led to increasing mobility of teachers across national borders in both South-to-North and South-to-South directions. At the same time, international exchange programs designed to support the professional status of teachers in the developed nations appear to have stagnated. While “teacher quality,” is currently a topic of much concern, rarely do cross-national studies consider teachers as a workforce. I argue that prevailing theoretical paradigms used to analyze global trends in mass school (e.g. neo-institutionalism, world culture, core-periphery theories, etc.) ignore the growing body of research on the teaching workforce compiled by economists and scholars of the labor market. In this dissertation, I explore how labor-market theorists, conceptualize the issue of teachers as members of a workforce. I discuss how the works of transnational actors (UNESCO, OECD, Teach for All) have created situations where the teachers’ job has been homogenized and de-contextualized from local surroundings. These theories suggest that nations and trans-national organizations engage in long-term efforts to raise the professional status of teaching, that teaching will continue on a trajectory to a lower-skill occupation that will be increasing see greater trans-national mobility, lower job stability and long-term erosion of the social status of teachers.

Moreover, I track the trajectory of transnational teacher mobility overtime and find that this phenomenon did not begin recently. It has existed since the late nineteenth century, when some European Missionary teachers moved around in Africa. They were
there not only for religious purposes, but were also acting as “agents” of colonial power. After World War II, a growing number of teachers started to teach abroad through the teacher exchange program established by mainly nation state or government-related institutions to broaden the understanding of other cultures, customs, and languages. These programs became prevalent among developed countries during the Cold War period. In the present era of increased globalization, it has become apparent that an increasing number of teachers flow across national boundaries because of organized international recruitment.

By analyzing significant cases and using historical, cross-national, and other forms of data, I conclude that there are three models of global teacher mobility, which can be categorized by the historical period, program goals, as well as teachers’ roles. These are the “Colonial model,” the “Nation-exchange model,” and the “Market-driven model.” In addition, the roles and functions that significant institutional actors play also shift over time. In the Colonial model, colonial governments were the only actors to plan and ship teachers to the colonial territories since education was a major channel to “civilized colonists and keep them in a state of obedience.

In the nation-exchange model, nation states played a critical role and were heavily involved in the operation of transnational teacher mobility. Teacher-exchange programs under this model were primarily established and implemented by nation states, local authorities, or government-sponsored organizations. Governments or government-related institutions have become the most important agencies that facilitate and promote international teacher exchange. Institutional actors in different levels of government commonly cooperate and communicate in order to achieve their program goals.
Under the market-driven model, the “privatization” of agencies, which were actively involved in international recruitment, is a crucial factor that accelerates transnational teacher mobility. Expanded private agencies have engaged in recruiting teachers from abroad. However, because the process of recruitment is highly “commercialized” and “business oriented,” most talented and capable teachers have been targeted, and this may “cream off” effective teachers in developing countries, especially in small states in the Caribbean region.

Finally, policy implications and recommendations for different models as well as for each possibility of teacher transfer will be addressed at the national and international level to show how transnational teacher exchange, contribution, and migration could shape the teacher workforce in the future.
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Chapter One: Introduction

I. Focus and Background

Though not many people are aware, over the past decade the number of overseas-educated teachers being hired in the United States has been growing steadily. A report, "Importing Educators: Causes and Consequences of International Teacher Recruitment," recently issued by The American Federation of Teachers (AFT), estimates that 19,000 teachers were temporarily working in the United States in 2007. The number of Labor Condition Applications (LCA), an indicator showing the intent and interest by each state to hire overseas-trained teachers, has increased from 15,324 in 2003 to 20,724 in 2007. Moreover, some school district officials heavily rely on overseas teachers to run their schools and think, “recruiting domestically is almost a waste of time.” For instance, in 2005, Baltimore City Public hired 108 Philadelphia teachers to staff schools. Four year later, in 2009, the number drastically increased to 600, contributing more than 10% to the city’s teacher workforce in Baltimore (AFT, 2009).

This emerging phenomenon of transnational teacher mobility, driven by international recruitment, does not occur only in the United States. Current reports from international organizations, such as UNESCO and OECD, indicate that more and more countries, such as, Switzerland, Australia and the United Kingdom, have been actively recruiting teachers from abroad for different reasons. Some of them may need foreign teachers to provide second language education for the increasing number of immigrant students with different culture and language backgrounds. But many of them need to meet teacher shortages to operate their school systems, especially in the hard-to-staff areas and hard-to-fill subjects, such as math, science and special education (OECD, 2005; UNESCO, 2006).

Contextual issues, such as globalization and the General Agreement on Trade in Services (GATS), provide a way to facilitate international labor mobility among teachers. But more importantly, profound changes in the K-12 teaching profession, including long-term declines of
entering teaching standards, becoming more common in core curricula around the world as well as the increasing teacher shortages in many countries also create a situation that accelerates the moving of teachers across the national boundaries.

In the era of increased globalization, teachers are able to make international contacts easily and frequently. By sharing information about job opportunities around the world and using the advancements in telecommunication and transportation, teachers increase their chances of moving across national boundaries to provide their services. The development of technology has effectively shrunk the distance between nations, and influenced teachers’ aspirations of transnational movement. Moreover, the General Agreement on Trade in Service (GATS), came into being in 1995, is the first multilateral agreement to provide legally enforceable rights to trade in all services, including the presence of natural persons (e.g. auditors, executive officers of multinational corporations, and teachers). Countries that sign this agreement, agree that teachers have the right to travel from their own country and teach in another (UNSECO, 2003).

Although some Asian countries, such as Taiwan and Korea, enjoy selecting their highly qualified teachers from surplus pools, in general, a lot of countries are dealing with teacher shortage and the estimate of teachers needed in the future, which also increases cross-nationally (UNESCO, 2006). In the United States, about 200,000 new teachers need to be recruited annually and one-third of them need to be allocated to poor, urban areas. According to the 2007 Teacher Shortage Areas Nationwide report, this shortage, even with the need to add new blood or retain longer teaching teachers, exists in nearly every state. On the international level, the report, Teachers and Educational Quality: Monitoring Global Need for 2015, published by UNESCO, indicates that about 18 million new teachers are needed by 2015, if all the countries in the world intend to achieve universal access to primary education for students (AFT, 2009; UNESCO, 2006). Given this trend, an increasing global teacher need has become one of major driving forces of transnational teacher mobility.

In addition to the teacher shortage occurring in many countries, a long-term decline in
entering teacher test scores, academic skills, as well as relative wages also creates a circumstance that has led to the transnational teacher flow. We have witnessed that professional organizations in each nation (i.e. Teacher Union) and transnational institutions (i.e. UNESCO, OECD) have a long-term involvement to raise the professionalism of teachers and to create autonomy; however, economists and scholars have found that the relative quality of teachers has fallen. This reveals that the relative schooling and wages of schoolteachers in the U.S. have declined since 1940 (Lakdawalla, 2006). This trend of “de-skilling” of teachers can be applied to a wide range of nations (Fischman, 2001). Since this long-term deskilling of teaching is observed cross-nationally, K-12 teachers could be increasingly regarded as less-skilled workers, allowing for relative ease of moving across national boundaries to provide their service.

The last contextual issue concerning transnational teacher mobility is a standardized core curriculum and predominantly whole-class instruction around the world. For the development of curricula, not only the content of official core elementary curricula in every country is universal but also the percent of school time for core subjects, such as language arts and math, are common (Meyer, Kamens, and Benavot 1992). Moreover, a movement toward mass education instead of elite topics in mathematics and science are also observed (Meyer and Ramirez, 2000). For the teaching practices, teachers around the world tend to use whole-class lectures and recitation as a predominant method for instruction (Anderson, 1987). Hence, along with this global model of schooling, although overseas-trained teachers may have different culture and language backgrounds, they can easily adjust and quickly “fit in” to “homogenized” school systems and teach successfully in “de-contextualized” local settings, which makes international teacher mobility more possible.

The increasing number of overseas-trained teachers recruited by the U.S. and U.K. schools may place many talented educators in classrooms; however, a global concern about the negative impacts of recruiting teachers from abroad is rising, especially when “South-to-North” has become the major trend of recent global teacher movement. The primary worry regarding this
phenomenon is that transnational teacher mobility from the south may worsen the “brain drain” in developing countries because losing teachers means losing their human capital. In addition, without a sufficient teacher workforce, it makes those countries more difficult for to achieve their educational goals, such as Education for All (EFA). In other words, the trend that teachers migrate from South-to-North has led to a host of concerns about exploitation, unethical hiring practices as well as harmful effects, such as losing their most qualified teachers (UNESCO, 2003).

Moreover, the role of “teacher” in developing countries may extend far beyond that of “instructor.” A teacher may play multiple roles in a community, including being a supervisor, disciplinarian, HIV/AIDS counselor, or a community leader or arbiter. Teacher loss because of international recruitment may impact not only the learning and achievement of students, but also the well being of schools and communities. That is, the meaning of “teacher” in developing countries has wider implications than in industrialized societies, where most teachers’ duties are limited to teaching in classrooms (UNESCO, 2003).

On the other hand, recruiting overseas-trained teachers, as a strategy to “quick-fix” the problem of teacher shortages also causes many concerns in the receiving countries. Although they do not deny the contribution and commitment that overseas teacher are making to the schools, a raising voice from teacher unions (i.e. AFT) worries that relying heavily on foreign aid to staff schools may mask the root of causes of teacher shortages. International teacher recruitment may provide an immediate solution to fill the imbalance of local teacher demand and supply, and in some way, relives the pressure on local governments, however, without reframing the teacher salary scales and improving their work conditions, they believe that they will continue losing domestic teachers and remain lacking teacher labor across the states (AFT, 2009; Ingersoll, 2003).

Moreover, over-relying on foreign teachers may also threaten the development of local languages, domestic culture as well as national identities in some small nation states. For example, although Botswana relies heavily on expatiate teachers to run the educational system, in order to maintain their local language, the Botswana government has committed to train enough local
teachers and believed that primary students should be taught by local teachers to learn the local language of Setswana. Teachers from other African countries who speak a different language would be regarded as “inappropriate” to teach in the early grades of the primary level (Appleton et al., 2006).

To deal with these concerns, The Commonwealth may be the first transnational institution to have brought this issue to the table. This began with the Commonwealth Annual Meeting in 2001 when the South African Minster of Education accused the U.K. of “raiding” its human resources when a large number of experienced teachers moved to the U.K. Meanwhile, the Education Minister in Jamaica argued that developed countries get a “free-ride” on their spending for teacher training and asked for compensation from the U.K. and the U.S. for the loss of teachers because of international recruitment. Having taken a more than two-year discussion and an effort by the Commonwealth Secretariat, in September 2004, 23 Commonwealth Ministers of Education signed an agreement on the regulation of recruiting foreign teachers, called Protocol on Teacher Recruitment (Morgan et al., 2006; Appleton et al., 2006.)

This leading agreement aims to protect the “integrity” of the educational system within Commonwealth countries and avoids the “exploitation” of scarce human resources of poor countries. It also seeks to safeguard the rights of teachers and improve their working conditions in host countries. More importantly, the protocol outlines the acceptable recruiting process to minimize some negative impacts of teacher migration in sending countries, such as refraining from recruiting teachers during the academic year and providing all relevant information about the entire process to individual teachers, the governments of the source countries as well (Appleton et al., 2006; Morgan et al., 2006).

Although the major concern of South-to-North teacher migration focuses on the “brain-drain,” recent research indicates that skilled labor migration could possibly be called “brain circulation” instead. This alternative thought is based on the evidence that highly skilled migrant workers, such as technicians and engineers, can contribute to their home countries by sharing the
latest knowledge and skills with people in their hometowns or by creating a strong network between the host and the home countries (Saxenian, 2005).

Through this process, the “brain” is not a one-way drain anymore but a circulating gain for both sides (Saxenian, 2005; Kuznetsov, 2005). Applying this theory to a group of teachers, transnational teacher mobility could be potentially a two-way process, opposed to a one-way “brain-drain.” Teachers in host countries contribute remittances to the families they leave behind, forge networks that link migrants to their source countries, and may eventually return to their home societies with added professional experience. So, transnational teacher mobility is not just advantageous for the receiving countries, but increasingly brings benefits for all players (Appleton et al., 2006).

However, examining the impacts, either “brain-drain” or “brain-gain,” only from South-to-North seems too narrow. In order to broaden the understanding of this phenomenon and to deal with this dynamic global movement trend, multiple possibilities of teacher transfers across national borders, including North-to-North, North-to-South, South-to-North and South-to-South will be highlighted in this study.

If we carefully examine the possibilities of transnational teacher transfer, we can find that different motivations, aspiration as well as structural forces may drive each type of transnational teacher transfer. North-to-North teacher movement particularly looks at teachers who move between industrialized countries, initiating these moves for culture exchanges as well as professional development to exchange their “brain” with other industrialized countries. North-to-South teacher mobility mainly focuses on teacher movements from industrialized countries to developing countries, as a form of volunteers to serve in the fields related to education in developing countries and promotes the responsibility for global citizenship. Teacher flows from developing to industrialized countries are regarded as South-to-North migration, which causes most concern of the “brain-drain.” The force of the global labor market, seeking higher pay or better working conditions, mainly drives this direction of teacher migration. Finally, although the
south-to-south migration is relatively small, it still happens with the movement of teachers between developing countries.

The divide between global north or global south, as I use the terms, is not just defined by geographic location, i.e., northern or southern hemisphere. The north-south divide is more indicative of the socio-economic development and political openness that divide countries into different overall categories. In general, the countries that are categorized as part of the “North” are considered to be at a higher level of development; in contrast, the countries belonging to the “South” are those with a lack of development. In other words, the north is associated with economic development, industrialization and the creation of international policy while the south is associated with lack of infrastructure, the need for international aid, and the subject of policy or international intervention.

According to Reuveny (2007), the idea of categorizing countries by their economic and developmental status can be traced back to a time during the Cold War when countries were simply classified as in the East or West. And then the West, mainly the United States and its allies became the first world; and the East, including the Soviet Union, China, and their allies became the second world; and less developed countries constituted the third world. As time passed by, some second world countries joined the first world, and others joined the third world. So, the first world became the “North.” The North is home to four of the five permanent members of the United Nations Security Council and all are members of the G8. Virtually all other “ third world” nations have come to be placed in the global “South.”

Although the line of North or South countries is not strictly drawn and sometimes it needs to be reclassified, the reason that I employed global north/global south instead of the idea of develop/underdevelopment is because this divide clearly highlights the uneven patterns of transnational teacher mobility. In the twenty-first century migration flows in general, and with teachers in particular, goes from south to north. People tend to leave countries in the South and attempt to find a better life in the North. For example, Africans and Southwest Asians want to
live and work in Europe. Southeast Asians want to live and work in North America and Europe. The transnational teacher migration follows this pattern: the amount of south-to-north teacher transfer has increased particularly in the late twentieth Century.

Moreover, if we track the trajectory of transnational teacher mobility overtime, we can find that this phenomenon did not begin recently. It has existed since the late nineteenth century, when some European Missionary teachers moved around in Africa. They were there not only for religious purposes, but were also acting as “agents” of colonial power (Tiberondwa, 1998). After World War II, a growing number of teachers started to teach abroad through the teacher exchange program established by mainly nation state or government-related institutions to broaden the understanding of other cultures, customs, and languages. These programs became prevalent among developed countries during the Cold War period. In the present era of increased globalization, it has become apparent that an increasing number of teachers flow across national boundaries because of organized international recruitment.

In this study, I examine the transformation of transnational teacher mobility in the context of a global teacher workforce during different time periods. By analyzing significant cases and using historical, cross-national, and other forms of data, I conclude that there are three models of global teacher mobility, which can be categorized by the historical period, program goals, as well as teachers’ roles. These are the “Colonial model,” the “Nation-exchange model,” and the “Market-driven model.”

In addition, the roles and functions that significant institutional actors play also shift over time. In the Colonial model, colonial governments were the only actors to plan and ship teachers to the colonial territories since education was a major channel to “civilized “ colonists and keep them in a state of obedience. For example, thousands of Japanese teachers were sent to Taiwan to teach in primary schools during the Japanese colonial period (1895-1945).

In the nation-exchange model, nation states played a critical role and were heavily involved in the operation of transnational teacher mobility. Teacher-exchange programs under this model
were primarily established and implemented by nation states, local authorities, or government-sponsored organizations. Governments or government-related institutions have become the most important agencies that facilitate and promote international teacher exchange. Institutional actors in different levels of government commonly cooperate and communicate in order to achieve their program goals. For example, The Council of Local Authorities for International Relations (CLAIR) was established in 1988 as a joint organization of local authorities to provide support for local level “internationalization” in Japan. This institution administers the Japan Exchange and Teaching Program (JET) in cooperation with local governments and three Ministers of Japan (The Council of Local Authorities for International Relations, 2010).

Under the market-driven model, the “privatization” of agencies, which were actively involved in international recruitment, is a crucial factor that accelerates transnational teacher mobility. Expanded private agencies have engaged in recruiting teachers from abroad. They use several methods to recruit teachers, including advertising on the Internet, recruiting via telephone, and advertising in the local media in sending countries. Instead of direct recruitment by schools or local governments, private agencies can smooth the burden of red tape from bureaucracy for teachers (UNESCO, 2003). However, because the process of recruitment is highly “commercialized” and “business oriented,” most talented and capable teachers have been targeted, and this may “cream off” effective teachers in developing countries, especially in small states in the Caribbean region.

Parallel with the development of private agencies, transnational institutions have become significant in resolving this global issue under this market-driven model. For example, The Commonwealth, a non-profit transnational institution, signed the Commonwealth Teacher Recruitment Protocol, a benchmark on regulation of international recruitments (The Commonwealth, 2009).

Rather than analyzing this issue from historical and geographical perspectives, theoretically explicit analysis of how and why international teachers choose to teach abroad is needed because
there has not been a systematic explanation of the phenomena of transactional teacher mobility. Based on the findings from this study, I argue that relying on traditional theoretical approaches, such as neo-institutional theories or world system theories, seems no longer sufficient to tackle this contemporary phenomenon of transnational teacher mobility. These theories may ignore the motivation, aspiration and personal goals of individual teachers for decision making to flow globally. Also, these theories too often overlook the imbalance of power between two countries regarding both military and economic power. In other words, although the structure that forces either the promotion of emigration from developing countries or the attraction of immigrant into developed nations is important, the individual taste or interest to respond to these structural forces to become a migrating teacher is equally important. Hence, incorporating the labor-market theory into these dominant theories, arguing that teachers as a workforce in the global labor market can deliver their service, can help us advance our theoretical understanding of how schools function, and help policy makers anticipate the trends and changes they are likely to see.

**II. Purpose of the Study**

My first goal of this study is to identify different types of transnational teacher mobility and examine the functions of institutional actors in the process of international teacher exchange and recruitment. The primary interest here is in understanding the development of global teacher mobility, both currently and historically. I delineate three models of cross-national movement and teachers’ different roles in the diverse range of program goals throughout history. I also argue that Teachers are now migrating international in Patterns that differ from historical patterns. More importantly, the primary purpose of this study is to examine the roles that institutional actors play in the operation of transnational teacher mobility.

The second goal in this study is to explore the spatial patterns: multiple possibilities of transnational teacher transfer within or crossing the regions. Geographical direction of transnational flow, such as South-to-South or South-to-North, will be highlighted to provide any possibility of teacher transfer based on different motivations and aspirations. A broadened view
of transnational teacher movement is needed to tackle this issue since this form of migration is a complex and dynamic phenomenon.

Third, I will examine the contemporary theories, commonly describing global trends in mass schooling (e.g. neo-institutional theory and world culture theory, etc.) and see whether these theories are sufficient to deal with this multi-faced international teacher migration or whether some important theories, such as labor-market theory should be account for, especially, within the situation of teacher shortages in many countries and the long-term decline of academic standards for entering teaching occupations. Finally, the potential contribution of the study will be to provide policy implications regarding the issue of transnational teacher mobility based on the conclusions and findings of this research.

Although this group of teachers with such experience is relatively small compared to the total number in the global labor force, it is hard to deny the significant of this issues, especially the recent data indicate that the number of teachers moving between countries is growing, and an increasing number of countries have become involved in teacher exchange programs. The evidence also shows that more and more countries have begun to actively recruit teachers from abroad to meet teacher shortages or to provide teachers for the increasing number of immigrant students with different cultures and languages (OECD, 2005). Given these realities, I believe that the phenomenon of transnational teacher mobility will become an important issue in the near and distant future.

III. Research Questions

Based on my research goals, the research questions to be answered are:

1. How does the phenomenon of transnational teacher mobility develop over time? What roles do institutional actors play in the process of teacher-exchange or international teacher recruitment? How do institutional actors prevent and/or facilitate global teacher mobility at different time periods?

2. What theoretical framework should be accounted for to describe the recent emerging but
relatively complex and multi-faceted phenomenon of transnational teacher mobility?

3. What possibilities of transnational teacher transfer occur geographically? How do different levels of institutions, such as transnational institutions, nation states, local governments and policy makers, respond to and manage the multi-directional transnational teacher flow?

**IV. Outline of Chapters**

This dissertation is organized into five chapters. The present chapter provides a broad introduction to the study and reviews the contextual issues and background relative to the phenomenon of transnational teacher mobility. The purpose of the study and introduce of research questions are also addressed in the remaining chapters.

Chapter 2 explores the literature on transnational teacher mobility in more detail. I first draw upon the important contextual issues related to the phenomenon of global teacher flow, such as globalization, the General Agreement on Trade in Services (GATS), the long-term decline of entering teacher academic skills, standardized core curriculum as well as the teacher shortage in many countries, to create the circumstances that drive labor mobility among teachers. And then, I address empirical studies relating to the impact of transnational teacher mobility on both source and destination countries, regarding the rising concerns of either “brain drain” or “brain gain.” In addition, I review common theoretical frameworks used to explain the global trends in mass schooling, such as neo-institutionalism, world culture theory and world system theory and see if we need to theorized and re-conceptualized this complex and multi-faceted issue of transnational teacher migrations.

Chapter 3 outlines the qualitative methodology applied in conducting this study. The historical case study approach will be used to intensively describe and analyze the phenomenon because this can appropriately generate rich descriptive data to answer the research questions posed in this study. I also indicate the procedures of sampling and data collection for gathering evidence to conduct this historical case study. Four methods for data analysis, identifying items,
analysis from “bottom-up” and “top-down,” constant comparing within the period, and constant comparing crossing the periods, will be employed as the main approaches for data analysis. In the last part of this chapter, I outline some validity issues also pointing out some limitations of this study.

Chapter 4 carefully examines, in detail, the data from each significant case. Multiple sources of evidence will be collected and analyzed in this chapter. Documentaries and archival records as well as academic works are the primary sources for my data collection. Any relevant material, articles, reports, books, and media programs are recorded and collected in this database, taken in the form of a computer file. By analyzing historical, cross-national and other forms of data, I conclude that there are three models of global teacher mobility, which can be categorized by the program’s goals and historical period, teachers’ role as well as the degree of state involvement. Multidirectional transnational teacher migrations also are found from my data analysis, including: North-North, North-South, South-North and South-South. In addition, interdisciplinary theoretical frameworks are discussed to help advance our theoretical understanding.

Chapter 5 concludes with a broad discussion concerning the implication of transnational teacher mobility. I summarized the main findings and delineated salient features from data analysis. Based on these findings and reflections, I provided a multilateral framework for regulating international teacher migration. Also, a number of policy recommendations for improving and regulating the trends of global teacher movement, both under nation-exchange and market-driven models.
Chapter Two: Literature Review

In this literature review chapter, I first discuss the phenomenon of transnational teacher mobility in a broadened context, such as globalization and the flat world. And then I examine the cross-regional agreement on trade (i.e. the General Agreement on Trade in Services (GATS)), to see how these contextual issues affect the teacher flow globally. Further, I describe a profound change in the K-12 teaching profession, including an increasing demand for teacher worldwide, the long-term “deskilling” of teaching practices, and the increasing convergence of core curricula and instruction across countries. Exploring the contextual issues is important because if we can keep these global trends in mind, not only assists us to clarify the circumstances of how transnational teacher migration happened but also helps us to understand the situations that drive labor mobility among teachers.

Secondly, I review some theoretical paradigms that are commonly used to analyze the trends in mass schooling, including neo-institutionalism, the world culture theory, as well as core-periphery theories, to see whether these theories can properly explain the growing amount of teacher mobility or whether they are on longer sufficient to deal with this complex and multi-faced global teacher transfer. I then examine the contemporary theories regarding international migrations, specifically focusing on the labor-market theory, not only exploring the structural forces that promote and attract teachers move cross-nationally but also looking at personal selectivity, motivations, and networks to respond to the structure to become international teachers.

Finally, I examine the empirical studies relating to the impact of transnational teacher mobility on both source and destination countries, regarding the rising concerns about “brain drain”, “brain gain,” or “brain circulation.” Research regarding individual teacher transactions in foreign countries is also included in this section. And then I address some studies seen from a micro perspective to see how individual teachers adjust when they face special challenges in new environments such as communication gaps, teacher/student relations, as well as different
expectations from parents. Moreover, this section includes some research that examines the experiences of international teaching participants who are mostly teacher candidates.

After reviewing the related literature from different viewpoints, I found a lack of studies examining this issue from a historical and geographical perspective and have explored the transformation of transnational teacher mobility over time. Moreover, very rare researches explore functions of significant institutional actors play in the process of transactional teacher mobility and recruitment. Hence, re-conceptualized the phenomenon of transnational teacher mobility from the changing roles of institutional actors is essential. I also found some international migration theories, which is useful and important to deal with global teach workflow, such as labor market theory or network theory seems have been long-term ignored. So, incorporating labor market into world culture theories, arguing that teacher as a member of labor workforce can help us advance our theoretical understanding.

I: Contextual Issues related to Transnational Teacher Mobility

In order to understand the situation of transnational teacher mobility in a global context, it is important to carefully examine the related contextual issues. Addressing the general contextual issues, such as globalization and the effect of transnational agreements (i.e. GATS), provides a broadened background to understand the circumstances that drive teacher migration. Equally important, focusing on specific trends of long-term change on the teaching profession, such as the global teacher shortages, long-term decline of entering teacher’s academic skills, as well as an increasingly homogeneous curricula and instruction, also shows that conditions that facilitate transnational teacher movement have been evolving.

Globalization and Transnational Teacher Mobility

A useful definition of the term globalization, offered by Gibson-Graham (1996), is that “the world is rapidly being integrated into one economic space via international trade, the internationalization of production and financial markets, and the internationalization of a commodity culture promoted by an increasingly networked global telecommunications system.”
Similar to this definition, Stiglitz (2002) argues that globalization is “the removal of barriers to free trade and closer integration of nation economics.” In other words, globalization “compresses” space and time around the world, and breaks down the boundaries among nations to allow people to make contact and trade easily and frequently.

In fact, globalization has influenced not only economic activities but also other dimensions including social, political, and cultural phenomena. Stromquist & Monkman (2000) state that the ideas of free trade, private enterprise, and foreign investment, are the main features in the economic area. In the social area, globalization creates new patterns of consumption, lifestyles, family relations, and social organizations. The amount of flow of people, goods, and new identities are becoming apparent in cultural change. On the political level, people are more willing to accept the ideas of pluralistic systems, multiparty democracy, free elections, independent judiciaries, and human rights.

Rather than ideas, thoughts are influenced by globalization. Breakthroughs in technology also speed globalization in the whole world and make international migration relatively easy. By using the advancements in telecommunication and transportation, people around the world can easily share information about work opportunities and enhance their global awareness; as a result, the exchange of individual services accelerates. According to OECD (2000), the rate of international migration is increasing. The number of migrants has doubled from 75 million in 1965 to about 150 million in 2000. International migrants are defined as “those who reside in countries other than those of their birth for more than one year” (IOM, 2000).

Instead of migration among lower-skilled labor, there has also been a growing migration among skilled and qualified workers, including scientists, academics, professionals in the health sector such as medical doctors and nurses (OECD, 2000). In addition, these migration trends do not just occur in specific countries but have happened worldwide. For example, between 1970 and 1990, the number of countries categorized as major receivers of migrant workers increased from 39 to 67. During the same period, the number of countries categorized as major senders rose
from 29 to 55 (ILO, 2000).

In the era of increased globalization, teachers are able to make international contacts easily and frequently. By sharing information about job opportunities around the world, teachers increase their chances of moving across national boundaries to exchange their services. The development of technology has effectively shrunk the distance between nations, and influenced teachers’ aspirations of transnational movement (Ochs, 2003).

*General Agreement on Trade in Service (GATS)*

The expansion of the General Agreement on Trade in Service (GATS) into the public sector has become an important issue relating to transnational teacher mobility. The GATS is a treaty of the World Trade Organization (WTO) and came into being in 1995. Before the agreement of GATS, the public sectors, such as health care, postal service and education etc., have restrictions imposed by national authorities, so workers from these public sectors found that it difficult to move across borders. Migrations from public sector always happened within their countries and had been traditionally regarded as domestic activities, not allowing for the international trade. Hence, the overall goal of GATS is to remove legal barriers to trade the service from many public sectors. As a result, it became the first multilateral agreement to provide legally enforceable rights to trade in all services (Robertson et al., 2002).

There are four modes of service delivery covered under this agreement (transborder, provision, foreign consumption, commercial presence, and presence of natural persons). Teachers, like auditors, executive officers of multinational corporations, belong to the mode 4, as presence of persons who allowing travel from their own country to supply services in another. Under Mode 4, countries that signed this agreement, agreed that teachers have the right to travel from their own country and teach in another. There may be potential benefits for developing countries that have a surplus of teacher labor (UNSECO, 2003).

These national commitments to cut the national boundaries to become more “liberalization” on educational services can be observed under the GATS. It gradually generates a form of global
educational markets based on this multilateral agreement, allowing trade teachers between countries. Instead of making own educational reform and policy by each state, it intensely influences by non-state actors and international organizations, such as World Trade Organization (WTO)’s GATS (Verger, 2010).

However, it seems difficult to reach the consensus from different parties regarding this agreement since GATS have been signed in 1995. Some anti-GATS groups consider that the GATS undermine the ability and authority of governments. K-12 teachers and school administrators should take out from GATS because they argue that this trade agreement always puts business interests over the citizen interests and makes it more difficult to regulate commercial activities within national boundaries. For example, “GATSwatch” network published a critical statement that public sectors “provided on commercial base” and open for “privatizations” and “marketization.” They believe that only business benefited from GATS and this agreement should be abolished or at least should be rewritten. This statement was supported by over 500 organizations in 60 countries in 2003 (GATSWATCH, 2003).

*Increased Demand for Teachers Worldwide*

Applied Santiago (2004)’s framework to analyze the teacher labor market, the recent report, Teachers and Educational Quality: Monitoring Global Need for 2015, published by UNESCO (2006), highlights the trends of teacher quantity by analyzing a wide range of cross-national data sources. By using the change in pupil numbers and the possible expanded access to education as indicators, this report predicts the change in the number of teachers needed in different countries and, more importantly, to predict the size of the primary and secondary teaching force across the world. In order to precisely calculate future teacher needs in different countries, the report also takes into account the student enrollment rate and the flow of teachers in and out of the workforce.

Not surprisingly, most countries included in this report will need more teachers than they currently have. For example, small nations like Chad, due to the growth of its population, will need almost four times as many primary teachers in 2015 as it currently has, from 16,000 to
61,000. In the United States, the supply of primary teachers in 2004 was 1,677,000. The projected demand for teachers needed, the gap between expected teacher graduates and expected vacancies, in 2015 is 1736,000, a 3.5% increase. Because of the growing teacher shortage, this report further indicates that more and more developed countries have increasingly turned to recruiting trained teachers from less-developed countries (UNESCO, 2006).

The debate on the causes and consequences of teacher staffing problems in the United States are mostly taken from two perspectives. The first one deals with this problem focusing on the increase numbers of student enrollment and a large amount of teacher retirements. These factors will result in teacher shortage and school staffing problems, which also lead to decreases in school performance (Feistritzer et al, 1997). Framing the issue from this prospective, the solution for staffing problems in many schools will focus on training new teachers and hiring, pouring more water into the teacher labor pool.

Second perspective of teacher shortage, as Ingersoll (2001, 2003) believes that there is no teacher supply shortage in the U.S. but more likely a teacher retention problem. He examined this problem from an organizational perspective. Negative organizational conditions, such as lack of planning time, too heavy a workload and lack of influence over school policy, mainly lead to teacher turnover. The data seems support this argument. For example, the teacher turnover rate is significant in the United States. Schools lost about 550,000 teachers, roughly 16% of the total workforce in 1999/2000. Indeed, about one half of the turnover was because of teacher transfers to another school; the other half decided to leave their teaching careers (NCES, 2005).

Different countries face different scenarios in terms of demand for teachers. Most countries need to either recruit more new blood or retain current teachers, although a few Asian countries have recently experienced problems of teacher surplus. But in general, the estimated need for more teachers will continue to grow in the future over most of the world (UNESCO, 2006). Because of this increasing global need for more teachers, more and more countries may look abroad to solve their teacher shortage. This phenomenon has become one of the most important
contextual factors that “pull” teachers to teach in places other than their home countries.

**Toward Common Forms of Schooling**

Neo-institutionalists and world culture theorists (such as Meyer, 1977, 2007; Boli, 1985; Baker, 2005; Benavot, 1991) have articulated a set of arguments that transnational trend toward common forms of schooling. It includes that the spread and institutionalization of mass schooling, the spread of human rights ideology and the standardization of core curricular requirements. According to world culture theorists, there is a global model of schooling, not exactly the same but with more “isomorphism” across nations. By sharing similar norms and ideas, nation-state actors realize that the global model might be the best way or the better way to run their nations and schools and education becomes a core function of the nation-state (Ramirez and Boli, 1987).

Anderson-Levitt (2003) points out there are four main elements of the common model of schooling. By examining these key features, it can help us to clarify the assumption and hypotheses about world culture theory, including the ideals, basic structure, educational institutions as well as content and instruction. Theoretically, world-culture theory posits that nation-state elites value education as a “universal human right” and believe that education can have positive effects on the development of nations. These ideals encoded generally in national laws or other official documents and policy.

The basic structure of the common model of schooling is “mass” and “compulsory.” Every nation has set up a 100% enrollment rate, as the major education goal, in the primary schooling system and has extended the compulsory education to secondary schools or even higher levels. Universal increasing of the number of female participants and narrowing the achievement gap between genders can also be observed by using cross-national data (Baker and LeTendre, 2005). For the educational institutions with the common model of schooling, world culture theories indicate “the principle of the classroom.” These principles seem to be subscribed to by the entire world (Meyer and Ramirez, 2000). The tendency of clustering children into a number of graded schools can be observed worldwide. Co-education, instead of separate schooling by gender, class
and ethnicity, has become more common around the world.

The element of content and instruction in the global model of schooling and world culture theories found that there is a common core curriculum around the world at the elementary level (Kamens, Meyer, and Benavot 1996). A uniform core elementary system in every country consists of language arts, mathematics, social science, natural science and aesthetic education. Not just the contents of teaching are universal, but world culture theories also indicate the time that is allocated to core subjects is common. For example, about 33% of school time is spent on language arts, 18% on math, 5% to 10% on other subjects (Benavot & Braslavsky, 2006; Meyer, Kamens, and Benavot, 1992). Further, they also found that there is a movement toward more world emphasis instead of focusing on one nation or signal-regional topics (Meyer and Ramirez, 2000).

For the instruction part of the common model of schooling, Anderson and colleagues (1989) found that teachers around the world are more likely to use “whole-class” lectures and recitations as a major method for teaching. By using TIMSS data, LeTendre and his colleague (2001) examined the teaching practices and teacher beliefs that occur in classrooms and find that there are many shared commonalities but only few differences.

Based on the above research and evidence, teaching seems rapidly losing its national flavor. Nationalities of teachers have become less important since they are in a situation of worldwide convergence of the educational system and find themselves in circumstances that lead toward a similar model of schooling. They are now working in schools with similar beliefs, universal basic structures, isomorphic educational institutions, and common core curricula and teaching around the world. If global trends in isomorphism continue apace, spreading from East to West, South to North, it will be more possible for teachers to migrate globally to deliver their services. Overseas-trained teachers, regardless of their training locations or cultural backgrounds, as well as nationalities can quickly and easily fit into a “homogenized” school system far away from their hometowns and teach successfully in a “de-contextualized” local setting.
Long-term Decline of those Entering the Teaching Profession

Although many professional organizations in each nation (i.e. teacher unions) and transnational institutions (i.e. UNESCO, OECD) have a long-term goal of raising the professional status of teachers; economists and scholars have found that the relative quality of teacher applicants and teacher pay have declined over time, undermining attempts to professionalize teaching. A long-term decline in entering teacher test scores, academic skills, as well as relative wages has been detected over the past fifty or sixty years. This creates a circumstance that teachers could be increasingly regarded as less-skilled workers. And once the occupation of teacher is regarded as a “semi-profession” or as “less-professional” workers, this will allow the relative ease of moving across national boundaries to provide their services with fewer limitations because the entering bar of academic accomplishments and skills is relatively low in many countries.

Lakdawalla (2006) examined the relative schooling and wages of schoolteachers in the U.S. since 1940. By using Young’s National Longitudinal Survey, he found that the relative quality of teachers is declining significantly. Measuring the quality of teachers by using wage-based and schooling-based indictors instead of their ability or IQ score, he found that the wages of male schoolteachers declined by about twenty-one-percentage point compared with those workers with similar college-educated backgrounds. For female teachers, the number even goes steeper about fifty percent lower than their counterparts. Haunshek et al (2004) found similar results in that the wages of U.S. schoolteachers have declined by 10-20% since 1940 compared to college graduates. In addition, Weaver (1983) indicated that U.S. schoolteachers have fallen nearly fifteen percentage points in earnings among college graduates. He reported the decline of teacher quality by using data including the effects of changes in schooling, experience, and the wages for similarly skilled workers.

This trend of “de-skilling” of teachers can be seen across a wide range of nations. Data from OECD and UNESCO show that the relative wages of primary teachers in developed countries...
have fallen (OECD, 1996, 1997, 1998). British schoolteachers’ wages have fallen 20% compared to relative wages since 1965, although there was a brief upward trend during the post-World War II baby boom years (Bee and Dolton, 1995). Schoolteacher’s wages in countries like Germany, France and Sweden deflated when the growth in the wage of the average employee was based on the data from 1965-1994 (UNESCO, 1989, 1993).

This long-term erosion of the teaching profession may be caused by, as Lakdawalla (2006) argued, the competition that other technical industries are more attractive as a result pulling teachers away. He stated that “as a result of the advantage in knowledge or breakthroughs in technology” there has been an increase in many professionals, such as doctors who have access to more effect treatments or engineers who have more efficient production techniques. This has increased their productivity. However, the knowledge transmitted by schoolteachers, such as how to read and write, remains unchanged. As a result, schoolteacher productivities remain stagnant compared with the demand for skilled workers outside the teaching profession. Since this long-term deskilling of teaching is observed trans-nationally, teachers could be increasingly regarded as less-skilled workers, allowing for their relative ease of moving across national boundaries to provide their services.

In sum, in the broadened background, such as globalization, there are enhanced opportunities of transnational teacher mobility. GATS proves the possibility for teachers to legally trade their services in other countries. A global teacher demand is one of the most important issues that drive the recent teacher mobility cross-nationally. In light of the common schooling model around the world and the long-term decline in the teaching professional characteristics also creates conditions that facilitate transnational teacher movement. Overall, the above contextual issues create advantage circumstances that allow transnational teacher mobility to occur relatively easily.

II: Theoretical Perspectives on Transnational Teacher Mobility

The reasons for international teacher mobility throughout the world can be explained by
using different theories; however, it seems that there is no single theory widely accepted by scholars. Different theories make different assumptions about why people move internationally. Scholars working in different theoretical traditions use different methods of analysis as well as focus on different aspects of international migration, providing variations in levels of analysis, including individual, household, national and international factors (Massey et al., 1993).

According to Massey et al. (1998), a comprehensive theoretical discussion of international migration should contain four elements: first, a characterization of the structural forces that attract immigrants to developed countries; second, the structural forces that promote migration from developing countries; third, the social and economic structures that arise to connect sending and receiving countries; and finally, a consideration of personal motivation, goals, and aspirations to respond to the structural force to become international migrants (Massey et al., 1998, p. 281).

In this theoretical section, I review some theoretical paradigms commonly used to analyze the trends in mass schooling, including neo-institutional theory and core-periphery theories. The idea, assumption and discourse of each theory will be carefully examined to see whether or not these theories are sufficient to explain the growing body of transnational teacher mobility. I then examine the contemporary theories regarding international migrations, specifically focusing on the labor-market theory, not only exploring the structural forces that promote and attract teachers move cross-nationally but also looking at personal selectivity, motivations, and networks to respond to the structured force to become international teachers. In addition, this section also includes the theories, such as the social capital theory, regarding how the connection is established between the origin and destination areas.

Although these theories do not talk about a particular group of people or occupations, focusing instead on the general phenomena of international movement and migration, these theories provide an overall understanding of the phenomenon of transnational teacher mobility. We can use these theoretical explorations to help us find some deficits, such as a lack of conceptualization of the role of institutional actors or the need for incorporating different theories.
(i.e. labor market theory) into more dominate theories (i.e. neo-institutional theory), within the context of a global teacher workforce.

*Neo-institutional Theory*

Institutional theory, developed by John Meyer and his colleagues in the 1970s, ideas advanced the idea that mass schooling is an institution in modern society and that it is a “taken-for-granted” and has “rule-like” schema that shape and influence people and social behavior. Instead of arguing that mass schooling was established for more highly educated workers for the development of an industrial society or just simply saying that mass schooling is a process of reproducing socio-economic class inequalities for the industrial laborers, Meyer and colleagues argued that the rise of a “uniform” pattern of state-sponsored, mass schooling was a result of the “institutionalization” and diffusion of “rule-like” understandings about the appropriate nature of educational organization in modern nation states. Based on this assumption, people share values and have similar beliefs about what teachers, and students should do in the classrooms and how school should be run (Meyer, 1977; Meyer and Rowan, 1977; Meyer and Scott, 1983; Rowan, 2005).

This argument about schools’ makeup as institutions and how they operate in similar ways in different societies is formed by the force of world culture: the ideology includes a set of agreements about the positive role of schooling in social development, about the rights and responsibilities of citizens, and about the uniform structure that basic schooling should take and how it should look (Brown, 2005). The power of world culture causes mass schooling to become more “isomorphic” and “homogeneous” around the world. It includes standardizing types of teachers, students, schools, curricula and so on. This world culture is rooted from western ideas, such as rationality and purposeful actions, which have been accepted by people who have subsequently developed a “norm of behaviors” around the world (Meyer and Ramirez, 2000; Baker and LeTendre, 2005).

Following the argument that schooling is an institution in society, scholars have looked for
similar teaching patterns around the globe. By analyzing the TIMSS data, including surveys and teaching videos, Baker and LeTendre (2005) have found that although some “national scripts” may affect teaching styles, teaching at most levels in follows similar broad patterns across national boundaries. They point out that disparate countries like Japan, Germany, Chile, Spain, and Taiwan share a common core of curriculum and instructional practices. For example, math teachers from different countries have similar beliefs and values about teaching and learning, as well as everyday practices in the classroom. Because the institutionalization of schooling is so powerful, the force of world culture can spread internationally and shape the form of basic instruction to become not “divergent” but more “convergent.” Increased communication, also helps foster the development of a global model of teaching.

Applying this theory to a group of K-12 teachers, overseas-trained teachers teaching in different cultures and educational systems do not have to make many adjustments. Teachers can quickly “fit-in” to the classroom in different countries, which makes international teacher mobility more possible. For example, according to the report from the Visiting International Faculty Program (VIF, 2009), without any particular training, Jamaican math teachers or Filipino science teachers, recruited by agents such as the Visiting International Faculty Program (VIF), can easily teach in any high school in the United Stated because they share similar beliefs and values about instructing patterns, and a standardized curriculum. Although these VIF international teachers are ethnically, culturally and linguistically diverse, coming from more than 50 nations, they reportedly teach the required curriculum and deliver adequate results as measured by students’ performance in the classroom. A report from school principals that have VIF teachers in their schools points out that VIF teachers are equally as successful as U.S. teachers in promoting student achievement (VIF, 2009).

Although the neo-institutional theory can explain part of the facts of why and how overseas-trained teachers can teach abroad, arguing that global mass schooling is run in a similar way, these theories may ignore the motivation, aspiration and personal goals of individual teachers for
decision making to flow globally. Also, these theories do not account for the imbalance of power between two countries regarding both military and economic power.

*World System Theory*

World system theory, is predicated on a neo-Marxist viewpoint of world affairs. According to the world system theory, the root of international migration, particularly from developing countries, does not exist because of the need or supply of labor within particular national economies, but is due to the “structure of the world market,” which can be traced back to the sixteenth century (Wallerstein, 1974; Sassen, 1991). Advocators of world system theory use terms such as “periphery” and “core” to represent the world system as a set of mechanisms, which redistribute resources from the periphery to the core. The core usually refers to the developed, industrialized, and democratic part of the world, and the periphery is the underdeveloped, raw material being exported from the poor parts of the world. This world market expects that the core always exploits the periphery because the capitalist firms enter the periphery for the purpose of looking for cheaper land, raw materials, and labor for higher profits (Massey et al., 1993, 1998).

According to Immanuel Wallerstein (1974), in the past, the structure of the world market was assisted by the colonial powers that administered the poor regions for the economic benefits of the colonizing nation. But today, by using acceptable terms, such economic globalization, it is possible for multinational firms to exploit poor nations’ resources. Based on this argument, developed countries spread and expand capitalism in developing countries. This, in fact, does not help those countries toward progress, development and modernization. Instead, developed countries want to maintain their economic advantages and reinforce their economic status. Under this unequal economic structure, poor countries seem not to have chances to change their disadvantaged positions, and thus continue to suffer in poverty (Massey et al., 1998).

Unlike goods and capital flow from core to periphery, international migration goes in the opposite direction, from South to North. Under this theory, international migration may lead to a
“brain-drain” in the sending countries. The most talented and educated workers will be selected in the process of international recruitment and move from poor to wealthy nations. This phenomenon can also be observed in the international teacher workforce. Data shows that the more experienced and talented teachers usually become the target of international recruitment by overseas agents. For example, a report published by the Policy Analysis and Research Unit shows that some countries, such as Jamaica, have lost their most capable teachers because of international teacher recruitment (UNESCO, 2003).

However, as I have pointed out above, a “satisfactory” theoretical discourse of international migration should consider four dimensions: the structural force that promotes migration from developing countries; the structural force that attracts immigrants into developed countries; a consideration of personal motivation; and the social and economic structures that arise to connect areas of in-and-out movement (Massey et al., 1998, p. 281). However, this world system only deals with one component, namely the structural force that promotes emigration from developing counties. Without taking other dimensions into account, such as individual goals and motivations, this theory may be incomplete and misleading to fully understand the phenomenon of international teacher mobility.

*Labor-Market Theory*

The oldest and maybe the most well-known theory that applies to transnational teacher mobility is the neoclassical macroeconomic theory (Todaro and Maruszko, 1987; Massey et al., 1993, 1998). According to this theory, international movement or migration occurs because of the difference in wages between countries. In order to maximize their income, people move across national boundaries from capital-poor counties to capital-rich countries; as a result, they will earn more for doing the same jobs (Massey et al., 1998). For example, teachers from South Africa received starting salaries in England that were 2.7 times higher than what they earned before migrating (Appleton et al., 2006). This theory also argues that international mobility is mainly influenced by the law of supply and demand in the labor market. The trend of international
workers should flow from “labor-abundant” countries to “labor-scarce” countries. So, international teacher mobility should follow this law, moving from surplus teacher countries, such as South Africa, to deficit teacher countries, such as the United Kingdom.

However, income disparity seems insufficient to explain international teacher migration. It constitutes a “necessary reason” but not a “sufficient condition” for international teacher movement (Massey et al., 1998). Some factors, such as “dissatisfaction with working conditions,” “professional development,” as well as “opportunity for travel” are also important factors, cited closely after income by the survey from Appleton et al. (Appleton et al., 2006, UNESCO, 2003). Hence, wage and employment differentials are not necessarily the most important determination for people who leave home for destinations abroad. Massey et al., (1998) criticize this approach, saying that “migrants clearly do not respond mechanically to wage and employment differentials…they are not homogeneous with respect to taste and motivation; and the contexts within which they make their decision are not the same” (p. 15).

In addition to examining international migration because of a difference in wages and labor market imbalances between countries, neoclassical economics theory also provides a microeconomics viewpoint - individual choice. The assumption of this theory is that every individual is a rational person and will calculate the benefits and costs for traveling abroad to find a job. The costs, including traveling fees, expenses of moving and looking for work, the effort of learning a foreign language, the struggle of fitting into a new working environment, as well as losing social networks and difficulties of establishing new ones, will be well considered by individuals before making the decision (Todaro, 1976; Todaro and Maruszko, 1987). People who intend to move abroad treat these costs as an investment for increasing their human capital. Although the costs may be high and involve some risk, it is worth the attempt because the investment can pay off by earning a higher income, becoming more productive, and gaining greater skills. When the net return is positive, people will move cross-nationally (Massey et al., 1998). Following the assumption of rational calculation, teachers, like other workers, will
estimate costs and benefits before making decisions about international migration. The costs may include such hurdles as culture shock, communication gaps, as well as problems with teacher/student relations (Hutchison and Jazzar, 2007).

Because micro-economic theory focuses only on the personal consideration of the motivations, goals, and aspirations of workers, it is too incomplete to explain the phenomenon of global teacher migration. Some structural forces, such as promoting emigration from developed countries or a strict admission policy, which limits immigration, are neglected when we examine this issue from a micro-economic perspective. In other words, the role of state government is extraordinarily important and should be taken into account.

Similar to the neo-classical model, the segmented labor market theory states that the reasons for international migration rise from the economic structure of developed nations, namely, permanent demands for immigrant workers (Piore, 1979; Massey et al., 1993, 1998). According to Piore (1979), international mobility does not happen because of the “push” factors in sending countries, such as low pay or high unemployment, but the “pull” factors in receiving countries, such as a “chronic” and “unavoidable” need for foreign workers. The recruitment by employers in developed countries is in response to the “structural need” of the economy, and the wage difference is not a necessary condition for labor migration to occur. So, under this theory, teachers move abroad not because they will earn more money by teaching in the receiving countries, but because it is initiated through the efforts of employers, agencies, and governments.

Following this argument, the state and its border control policies is central to explaining contemporary migration for theoretical and practical reasons. The volume of transnational teacher mobility does not depend on the motivation of teachers who intend to teach abroad, but strongly is influenced by the state’s admission policy. However, this focus on the “pull” factor does not reveal all the causes of transnational teacher mobility. Some experimental research shows that the “push” factor, such as dissatisfaction with working conditions, low pay, or a high unemployment rates, influence migration, especially for skilled workers such as teachers, nurses, and doctors.
Teacher mobility from Caribbean regions indicates that disaffection with working conditions, such as low pay, large class size, and unmotivated students, as well as the threat from HIV/AIDS, are the primary factors to “push” them to leave home and look for employment overseas (UNESCO, 2003).

In recent years, the new economics of migration theory have arisen, as a supplement to the neoclassical model. In order to precisely understand the phenomena of international migration, the supporters of new economics of migration theory argue that the analysis unit of international mobility should not be the isolated individual actors, but the units of relevant people, such as a family or household (Taylor, 1984; Stark, 1991, Massey et al., 1993, 1998). International migration occurs not only because people want to maximize their income, but also because they want to minimize the risks and failures of the labor market. By using diverse working locations (some family members may work in the local area and others in a foreign country), households can easily reduce the risks of economic conditions. In most developed countries, there are well-functioning mechanisms to deal with the risk of unemployment, such as using private insurance, bank loans, or governmental programs. However, most developing countries lack similar systems, or those in place are dysfunctional, and may force people to travel outside of their home country in order to decrease the possibility of unemployment (Massey et al., 1993, 1998).

Based on the assumptions of the new economics of migration theory, the decision to teach abroad is not made because of wage differences or a cost-benefit calculations, but because transnational movement can reduce the risks of the labor market or accumulate more capital for a whole family. However, teaching careers seem be relatively secure compared to other occupations, because most teachers teach in public sectors. Unlike blue-collar or white-collar workers in private companies, teachers do not need to worry about being laid off because of economic recessions. If the main argument of new economics of migration theory is that workers reduce the risks of a failing labor market by moving overseas, then it seems inappropriate to apply this to the occupation of teachers, as teaching has a relatively low risk of failure.
Social Capital Theory

Social capital theory basically argues that former migrants offer a useful connection to people who intend to migrate. This source of new migrants provided by a small group of pioneers, such as kinship, friendship, and community origin, can be treated as a form of social capital. Social capital, as Coleman (1990) defines it, “is created when the relations among persons change in ways that facilitate action.” By using this form of capital through social networks and special organization, people can more easily improve or maintain their position in society. Massey et al. identified this social network, mostly from friendship and kinship, as the “catalyst” to accelerate the growth of a migrant population. With this network, non-migrants gain access to information, knowledge, and assistance from migrants. With this help, people can lower their costs and risks of international migration and then increase their positive net returns after their cost-benefit calculation. Some scholars even called this social network a form of economic “migration capital” (Taylor, 1984).

Once this network is established, migration tends to expand, as people who intend to migrate can do so without too much difficulty. Hence, based on this assumption, the size of migration flow between two countries is not strongly correlated to wage differentials or employment rates, but stems from the growth of migrant networks established and social capital gained over time, which shrinks the costs and risks of international movement (Taylor, 1984; Massey et al., 1993, 1998).

Can this network theory be applied to the study of teacher transnational mobility? Because teacher migration is just an emerging phenomenon, only a very small number of teachers choose to migrate. Teachers who have immigrated can be treated as pioneers. They may gain their information and assistance from formal institutions, like international recruitment agents or departments of governments, but not rely on their social network, like friends or relatives. Moreover, this network theory may apply mostly to unskilled workers because they may depend on the resources of their social networks instead of agents, to whom they must pay extra money.
In other words, transnational teacher mobility is highly “institutionalized” as organizations develop to support, sustain, and promote their international movements.

In sum, theories related to social, economic, and institutional structures that promote transnational teacher mobility have been examined, including the world system theory, and the neo-institutional theory. World system theory deals with the structural forces that promote people from developing countries because of a consequence of capitalism penetration across national boundaries. Neo-institutional theory or world culture theory argues that mass schooling is an institution and has become “isomorphism” in modern society. Teachers with different cultural backgrounds can quickly “fit-into” the classroom in different countries. Labor market theory basically focuses on differentials in wages and employment conditions between countries. This theory also deals with personal goals; motivation, aspirations, and migration networks have been outlined to respond to the above structural forces by becoming international teachers. For example, neoclassical microeconomic theory generally treats the international movement as an individual decision, a rational choice in order to maximize income. In contrast, the new economics of migration views migration as a household decision in order to minimize risks of failure in the labor market. And finally social capital theory states that a migrant’s networking can be treated as a form of social capital that reduces the costs and risks and gives access to foreign employment.

After examining the contemporary theories of international migration, I find that these theories seem incomplete or fail to account for the broad phenomena. It is important to address the issues, such as the role and function of institutional actors, to provide a clear picture to understand the process of transnational teacher mobility. For example, according the report from OECD (2005), the use of a private agency, which actively pursues international recruitment, is a crucial factor that accelerates transnational teacher mobility. International recruitment may be initiated by individual schools, local school districts authorized by the government, or private recruitment firms that operate as “liaisons” between sending countries and receiving countries.
Recent data show that nearly 100 private agencies operate in the UK to recruit teachers from all over the world – mainly from South Africa, Jamaica, and New Zealand (OECD, 2005).

Some common theories used to describe global trends in mass schooling, such as neo-institutionalism, seems no longer provide sufficient reasons for or only explain part of the facts related to transnational teacher mobility. Labor-market theory, particularly focusing on income differentials among countries or the imbalance of the teacher labor market, should be taken into account. To some extent, social capital theory is useful for understanding why “co-ethnical” teachers intend to teach in the same country, but international teachers may gain most of their assistance from formal institutions, like international recruitment agencies or government-related organizations instead of friendship and kinship networks.

Hence, after I carefully examined and critiqued the contemporary theories of international migration, I realized that the phenomenon of transnational teacher mobility is highly “marketization.” However, existing theory seems to lack a conceptualization of the role of institutional actors in the process of international teacher exchange and recruitment. Institutional actors, such as a state government, are extraordinarily important and should be taken into account because they have the authority to determine the size of the international teacher pool, since most teachers need a working permit to teach abroad. Without the future theoretical exploration of the role of institutional actors, it would be very difficult to build an integrated understanding of transnational teacher mobility.

III: Development Impacts of Transnational Teacher Mobility

The impact of transnational teacher mobility should include positive and negative aspects for both sending and receiving countries. This leads to a debate about whether or not teachers moving from more developing countries to industrialized ones may cause either “brain drains” or “brain gains.”

*Brain drains vs. brain gains or brain circulations*

The common view of recruiting skilled labor from developing countries has negative effects,
namely “brain drain.” This one-way direction of the global labor movement presumes that
sending countries will lose their human capital and hamper the development in their countries.
Looking at the neo-Marxist viewpoint of world affairs, advocates of this argument, such as world
system theories, believe that the root of international migration, particularly from periphery
countries (developing countries), is due to the “structure of world market,” a long lasting unequal
mechanism of redistribute of resources from the periphery to the core (relatively more
industrialized counties). As a result, poor countries, under this unequal economic structure, will
suffer continued poverty. This presumption is widespread and also refers to the phenomenon of
transactional teacher mobility. In view of this popular argument, teacher migration and the
international recruitment from developing countries will cause severe shortages in sending
countries and inevitably generate harmful impacts on student learning as well as the quality of
education delivery.

However, viewing transnational teacher mobility only as a form of colonialism is too
narrow and easily misleading. As Morgan (2005) suggested, whether the transnational teacher
movement should be regarded as harmful or beneficial, it is important and useful for researchers
and policy makers to consider this presumption explicitly to avoid coloring the discussion for an
appropriate policy response. The term “brain drain” implies a one-way direction of migration,
like water flowing down a river; it is a permanent movement from one location to another. As
such, “brain drain” infers that international migration results in a permanent settlement and the
migrant will never return. Hence, the length of how long of transnational teacher live in abroad
would be a important factor to decided whether this flow could cause brain drain or not.

In fact, the data shows the overseas teachers have relatively low intentions to live abroad
permanently. Although there are a proportion of overseas teachers, who express this intent to
remain abroad, the majorities prefer to retune their countries once they finish their journey.
Receiving countries, like the U.K., around two third (72%) of overseas teachers from developing
countries just want to work temporarily, according to the survey from Morgan’s (2005) research.
On average, overseas trained teachers have commonly worked in England for two to four years. In Botswana, one of the main recruiting countries in South, 27.5% of expatriate teachers want to permanently settle in this country, the average period of international teachers working extends for five to ten years, because of their long-term reliance on the expatriate teachers in the education system. Teachers from sending countries, such as South African and Jamaican, show similar figures showing their intentions to live in the UK for the rests of their lives. Trainee teachers in South Africa commonly plan to work abroad for two years and eventually return to their home countries.

International teachers, who intend to teach in United States, have to maintain the H1-B and J-1 visas. These types of visas are designed for short-term working permits, allowing eligible working temporally in the United States. Once their visas have expired, overseas-trained teachers have to leave and reside in their home countries. Unlike the majority of foreign-educated health care workers, the United States government has shown her purpose to keep those professionals within the countries. For example, international nurses who have decided to work in the U.S. will receive permanent resident cards (green cards) in order to attract them to live and work permanently and an estimated 60% of these people become U.S. citizens. In the contrast, most international teachers who work in the United States are just on temporary visas. Although the number of overseas-trained teacher is increasing steadily, based on the types of visas issued, it presents the perspective from U.S government, whether she treats overseas-trained teachers as short-term workers to response to the unbalance in the local or as professionals that they should maintain them longer.

The above research results show that transnational teacher mobility leads brain drains would not occur unless they stay in host countries permanently. In contrast, the transnational teacher mobility may have the potential to be a two-way process, once they return to their hometowns. Hence, rather than only perceiving the international teacher mobility as part of the notion of “brain drain,” it may also be useful to regard this phenomenon as “brain circulation” or
even “brain gained” for both sending and receiving countries. For the receiving countries, like the U.K. and U.S., the governments regard importing overseas-trained teachers as a “transitional adjustment,” a short-term response to local shortage, but not a long-term solution to deal with the roots of the causes of the teacher shortage. For the sending countries, such as South Africa and Jamaica with teacher surpluses, it also requires them to adjust to their local excess demand for teachers. So, there may be a broader view to conceive the phenomenon of transnational teacher mobility as giving the national education system more flexibility to balance their local teacher demand and supply.

**Scales of transitional teacher flow**

In addition to the focus on the period of overseas-trained teachers working in host countries, whether permanently or temporarily, the scales of movement are another important factor to take into account to discuss the issue of “brain drain.” “Brain drain” generally refers to the negative effects occurred primarily in sending countries. However, if the number of migrant teachers in sending countries is comparatively small, the effects on those who they left behind may also be small or even have no effects. Appleton et al., (2005) examined the number of teachers who work abroad in two main sending countries, South Africa and Jamaica. They estimated that about seven percent of all Jamaican teachers are currently working as foreign teachers. For South Africa, around half a percent to four percent of South African teachers are working abroad. This wide range in the estimated number of migrant teachers in South African, from 0.5% to 4%, reflects a lack of reliable data to estimate the numbers of migrant teachers in sending countries and prevents further discussion of “brain drain.” However, they generally conclude that the transnational teacher mobility has quantitative effects for small countries, like Jamaica. For the larger countries, such as South Africa or India, the effects on teacher flow are relatively small, but not negligible.

**Career option for teaching abroad**

Beyond the debate of brain drain or brain gain from transnational teacher flow; a wider
perspective to evaluate the phenomenon of the global teacher flow could be viewed as a career option of interest for many teachers. This is not just for a small group of teachers who want to take adventures to experience foreign life but many of them show these intentions. According to the survey from Morgan (2005), around half of all non-migrants express their interest in teaching abroad, More precisely, 45% of English teachers, 48% of South Africans, 55% of Jamaicans and 62% of Batswana teachers want to have foreign teaching experience. Among the trainee teachers, 27% of South Africans and 33% of Jamaicans show their intention to teach in a country different from their own. Although most of them who express their interests may never actually leave, teachers, in general, value the option of teaching abroad.

The high ratio of interest in overseas teaching shown by worldwide non-migrant teachers seems to imply that there is no clear line between the countries, which means that are no net senders or net recipients of teacher migrants. South-to-North teacher migration can be a trend of moving direction but it is not always the case; North-to-North movement could happen also. The report from VIF (2009) shows that the recruitments of nationalities of international teachers are very diverse. Not only from developing countries like Jamaica or Philippines are targeted; one third of VIF teachers come from developed counties like Canada, Australia and Europe. In the U.K., the top five source counties for teacher recruitment are South Africa, Australia, New Zealand, Jamaica and Canada (VIF, 2009).

This high level of intention for teaching outside their home countries also shows the reasons for the motivations by migrating teachers. Although the income differential remains the main reason for international migration, other driving forces exist. According to Morgan’s research, professional development was rated as the second reason to attract teacher mobile internationally. Personal options, like the opportunity to travel, present other important factors that push teachers to move across the boundaries; this is particularly true for teachers from developed countries.

Benefits of teachers themselves, sending and receiving countries
Morgan et al. (2005) identified positive features of the international recruitment of teachers in three types of people: the migrant teacher themselves, the compatriots in the sending countries, and their hosts in the receiving countries. Although some negative aspects have been mentioned among these parties, the authors are inclined to view that the positives outweigh the negatives. Analysis of overall wellbeing or the interests of these three groups focus on two dimensions: economic, such as material living conditions; and education, like learning outcomes.

Since the majority of international teachers chose to teach abroad voluntarily, we may assume that they will gain from international migration. The higher salaries that they can earn are the most common and important reason for migrant teachers. Teachers from South African earn three to four times more when they teach in the UK than in their own counties. In the United States, Filipino teachers earn more than ten times compared with those who stay in their home countries. Although the cost of living in the countries, like the U.K. and the U.S. is relatively high, most migrant teachers can save substantial portions of their salaries and send this back to support their families.

The income gains for migrant teachers are likely to be seen as the main benefit of transnational mobility. However, as noted above, income differentials are apparently not the only reason for international teacher mobility. Professional development and the opportunity for travel remain notable reasons to motivate teacher movement. The experience of teaching abroad may also help them to discovery a different culture, learn new ways of teaching and thinking, as well as focus on global issues. In other words, benefits of teaching abroad could be personal and professional transformation. Although a small portion of international teachers reported bad experiences, such as receiving poor information or unequal treatment, most of them assess the time working abroad as favorable. With positive attitudes of teaching abroad, the majority of migrant teachers would recommend such experiences to others. For example, 71% of South African teachers in the UK would likely recommend the experience of teaching abroad to their colleges when they return to their hometowns (Morgan et al., 2005).
It has been regarded that receiving countries are the main beneficiaries in the process of transnational teacher recruitment. Overseas-trained teachers not only increase the stock of available teacher labor, but also globally disseminate knowledge. Bringing international teachers with different cultural backgrounds and teaching experience can stimulate the capacity of teaching innovation. In addition, because many industrialized countries have an ageing population exacerbating existing labor shortages including teachers, importing migrants could possibility rejuvenate the labor force. More generally, from an economic prospective, there is a tendency that foreign teachers will be paid less than local ones; as a result, this implies that hiring over-seas teachers has cost-saving effects for taxpayers. In short, the main interest for bringing foreign teachers is to make up for the shortfalls of local teachers, bring some “value-added” benefits, such as cultural contributions to students, and schools, and for communities, the indirect effects for hosting countries.

Although international teacher recruitment could be a “quick-fix” for the local labor shortages for the short term, some prolonged problems need to be considered by receiving countries. One of significant arguments focuses on using international teachers as a solution to overcome immediate teacher shortages; this can detract from the energy and investment for enhancing the retention of domestic teachers (Findlay, 2002). For a longer term, a large increase in employment of migration teachers may reduce the number of jobs available to the native population. With the aid from foreign teachers, local governments may lower their costs to compensate for placing teachers in hard-to-staff disciplines and locations. However, theoretically, once there is an inflow of teacher labor, negative influences on the local teachers regarding their wages will be suppressed by the supply of overseas teachers.

Regarding to the benefits of sending countries, OECD (2002) indicates three key areas that have positive impacts on source countries: return of migrant workers; remittance of income earned abroad; as well as links between migrants and their source country. These positive impacts can partially weaken some negative impacts such as brain drain on developing countries. Once
migrants, especially knowledge-based workers like teachers, return to their home countries with new skills, knowledge and experience, they can use these to help local services improve their development as well. However, in some countries, like the Philippines, all migrants who return home are not welcomed because migrant workers for them act as an alleviation of the unemployment pressure. Once there is a huge migrant flow back home, there may not be enough employment opportunities for them; this would lead to a severe problem for local employment (Stalker, 2001). Hence, some government do not really want their migrants to return; instead, they have facilitated the recruitment of their workers by overseas employers and encourage them to stay abroad.

The second area for potential advantage of migrants for source countries is the gain from remittance. The money sent back home by migrant workers could boost the local economy. Research also shows that the contribution of remittances for economy development has more value than the individual return to the labor force. Although the exact values of income remittances from informal channels is difficult record, an estimated number from Castles & Davidson (2000) indicates the total income from global remittances has risen from around $2 billion in 1970 to $70 billion in 1995. In countries like Jamaica, the remittances from migrant workers have increased from 4.1% in 1991 to 9.8% of the GDP in 1997 (Stalker, 2001). According to Appleton et al.’s (2006) survey, migrant teachers from developing countries working in England remit or save a total of 22% of their earnings.

The third area of positive impact on source countries is the linkage created by migrant workers between source and destination countries. These networks, set up by migrant workers, facilitate the exchange of information and expertise among workers themselves, international employers, and relevant organizations and provide professional development in the source country (Meyer, 2003). It also lowers the costs and risks of individual transnational movement and, at the same time, increases the expected net returns to migrants (Massey et al., 1993). These could be informal networks, such as interpersonal ties of kinship, friendships and shared
communities. It could be also drawn upon by more formal organizations such as South Africa Network of Skills Abroad (SANSA). Both channels could potentially have positive impacts on economic growth in the source countries.

**Challenges of transnational teacher mobility**

However, an unlimited flow of labor, especially skilled workers, will cause negative impacts on source countries. Excessive loss of domestic labor, as we have discussed above, can lead to a brain drain of the young. If a large number of people in the labor force leave, it will not only deplete the workforce but also reduce the availability and quality of services (Stalker, 2001). For example, the loss of migrant teachers because of international recruitment, especially in small states, has a potential impact on achieving the goals of Education for All (EFA), a worldwide commitment that was first made in 1990 in Jomtien, Thailand.

Sives et al. (2004) have pointed out that how important of the role that teacher play in pursuit of these millennium objectives. Under these millennium development goals, education has been widely regarded as the key to economic growth, illness prevention as well as poverty elimination. In order to achieve these objectives, teachers have been regarded as crucial practicers, acting as a “perpetual persuader,” realizing the vision, involving the practice, and transforming people’s feeling, attitudes and beliefs in the communities. Governments around the world have initiated important education reform programs (Barber and Sebba, 1999).

In fact, attracting, recruiting and retaining talented persons to teach have become widespread concerns, not only in developing countries. International research from OECD (2004) shows that more teachers will be needed than currently exist. Appropriate incentives are needed in order to retain teachers in their teaching careers, not only to give compensation for unpopular areas and schools, but also salary premiums to teachers of subjects where there is a shortage, such as math and science.

Appleton et al. (2006) assess the impact of international teacher migration on developing countries because of international recruitment. This study covers four countries: two sending
countries (Jamaica and South Africa), and two receiving countries (Botswana and England). Using the data collected from surveys of schools, migrant teachers, and trainee teachers, they found that a third of trainee teachers in Jamaica intended to migrate, as did a quarter in South Africa. The data also show that around 7% of Jamaican teachers work abroad, compared with 2.5-4% of teachers in South Africa. About 2% of teachers in the U.K. and 4.5% of teachers in Botswana are foreign. They argue that the phenomenon of international teacher mobility is driven mainly by the expectation of income gains. On average, teachers from developing countries can double their real income when they teach in England. However, they argue that international migration of teachers may not be exclusively motivated by income differentials. Motivations such as “professional development” or “opportunity for travel” are closely followed by income as factors in decisions to migrate. Finally, they concluded that the adverse effects of international teacher mobility are “qualitative rather than quantitative” in sending countries, which means that international teacher recruitment did not lead to a harmful shortage in Jamaica or South Africa, but that they may have lost their most effective teachers during the international recruitment process (Appleton et al., 2006).

Teacher mobility because of international recruitment occurs mostly from South to North globally, and from developing to developed countries; however, some data show that teachers may migrate to neighboring and other developing countries. South-to-South teacher mobility can be found in some small states within the Commonwealth, a voluntary association of 53 independent nations, which are related to former British colonies. Botswana is one of these counties, and it has relied on international teachers to teach in its schools. The administrative data from Botswana show that about 1,046 (4.5%) full-time teachers were “imported” from other countries, in a national total of 23,308 teachers. The percentage of international teachers rises to 15% in secondary public schools. The private school sector seems almost dominated by teachers from outside Botswana (UNESCO, 2003; Appleton et al., 2006).

Whether teachers are migrating from Northern or Southern countries, the more experienced
and talented teachers from developing countries usually become the target of international recruitment by overseas agents. Jamaica may be the country that has suffered the largest loss of experienced teachers to other countries. According to a report published by the Policy Analysis and Research Unit, “over 40% of 337 recruits had between five and ten years of teaching experience while 30% had between 10 and 20 years.” In other words, teacher mobility because of international recruitment may “cream off” the most capable teachers and erode teaching quality in the sending countries (UNESCO, 2003).

Although there is an ongoing debate on the link between the quality of teachers and the achievement of student learning, a broad consensus is that “teacher quality” is a significant school-related variable influencing student achievement (Santiago, 2002; Eide et al., 2004). This tie is even stronger in developing counties and areas with limited educational resources. Heyneman (1976) examined 18 countries and found that for less industrialized societies, school-related variables had a greater impact on student achievement than in developed countries. School-related factors, like teacher quality or teacher/student ratio have significant effects on student achievement in developing countries. Hence, student learning in developing countries will be impeded and suffer because of international recruitment, particularly that of the most capable teachers.

Moreover, the role of “teacher” in developing countries may extend beyond that of “instructor.” A teacher may play multiple roles in a community, including being a supervisor, disciplinarian, HIV/AIDS counselor, or a community leader or arbiter. Teacher loss because of international recruitment may impact not only the learning and achievement of students, but the well-being of schools and communities. The meaning of “teacher” in developing countries has wider implications than in industrialized societies, where most teachers’ duties are limited to teaching in classrooms (UNSECO, 2003).

Hutchison and Jazzar (2007) deal with this issue from a micro perspective, exploring individual teacher transactions in foreign country. By interviewing international teachers in the
United States, the authors indicate that international teachers encounter not just a new school, but a new nation and also a new culture. They may face several special challenges and costs, including culture shock, unfamiliar structural and organizational arrangements in schools, difficulty understanding assessment systems, communication gaps, as well as problems with teacher/student relations. They believe that the challenges posed by cross-culture teaching can be overcome by effective mentoring. Experienced mentors can help international teachers ease their transition into the classroom and guide them in the unfamiliar ways of the American culture (Hutchison and Jazzar, 2007).

Some research examined the experience of international teaching participants who are mostly teacher candidates. Their feedback was mostly positive. For example, the reports from returning teacher candidates who have participated in the Consortium for Overseas Student Teaching (COST) program show that the intercultural teaching experience helped them transform “personally and professionally.” The benefits of this program included the discovery of different cultures, learning new ways of teaching and thinking, the use of new languages and dialects, and a focus on global issues. They may also have gained multiple perspectives on the role of schooling from the exposure to different school systems and education policies, which helped in their professional development. Moreover, the value of student teaching abroad can increase teachers’ abilities to address both domestic and international diversity and to prepare for the increasing diversity of students in the classroom (Mahon and Cushner, 2002).

In conclusion, the impacts of transnational teacher mobility can be addressed either from macro or micro perspectives. Many researchers that I reviewed above take the macro view, mainly focusing upon the negative side in developing country, such as a depleted workforce and losing scarce human capital as a form of brain drain. Some researchers found relatively positive side for sending countries, as a type of brain-gained or brain-circulation. The other studies take this issue from the micro perspective argue that teachers leaving because of international recruitment represent a multi-dimensional loss, because teachers have multiple roles in
developing countries. However, after reviewing relevant studies, research, and reports, I found that very few or no studies examine this issue from a historical perspective or explore the transformation of transnational teacher mobility over time.
Chapter Three: Methodology

A historical multi-case study was applied in conducting this study because such a method might be the most appropriate to generate rich data for tracing how transnational teacher mobility came into being and what changes occurred over time. The selection of cases in this study was not done randomly, but purposefully. I basically selected the cases not just because they exhibited characteristics of interest to me but more importantly because these cases might contain typical or unique characteristics to represent a common practice and/or a different feature regarding the phenomenon of transnational teacher mobility that we have never encountered (Merriam, 2002). Moreover, the selection of the case depended on what I want to learn and the knowledge that might answer my research questions to improve my theoretical understanding as well as my practical understanding. For example, many of the cases that I have selected are related to teacher exchange programs commonly sponsored by nations or government-funded institutions, such as the Fulbright Teacher Exchange Program (FTEP) or the Japanese Exchange and Teaching (JET) program; but one of them was covered by imperial teachers transferred during the colonial period (i.e. Japanese teachers who taught in Taiwan during 1895-1945) and a particular case occurred more currently at the transnational level like Commonwealth Teacher Protocol.

Multiple sources of evidence were used to collect data in this study. Combinations of documentaries (personal, official, and popular culture), archival records, as well as academic works from each case were the primary sources for my data collection. The constant comparison within cases and across cases was employed as a main strategy for the formal analysis in the very beginning and at the near end of data collection. As Glaser (1978) pointed out, a constant comparative method is a useful method for theory development since the theme or categories might emerge from constantly comparing data analysis.

As mentioned in chapter one, the major goal of this study is to trace the trajectory of transnational teacher mobility over time and examine the process of how it evolved. This study
also focuses on exploring the multiple possibilities of transnational teacher transfers within or crossing the regions and emphasizes the multiple theoretical schemes to interpret this phenomenon. By using the historical multi-case study, coming out with the findings of the investigation as a comprehensive and colorful description of each case, I am trying to answer my research questions such as how does the phenomenon of transnational teacher mobility develop over time? And how do institutional actors prevent and/or facilitate global teacher mobility at different time periods? What theoretical framework should be accounted for to describe the recent emerging phenomenon of transnational teacher mobility?

I. Historical Multi-Cases Studies as Qualitative Research for the Phenomenon of Transnational Teacher Mobility

Among various kinds of qualitative research designs such as biography, ethnography and ground theory, this study uses the design of a case study. According to Creswell (1998), “a case study is an exploration of a “bounded system” or a case (or multiple cases) through detailed, in-depth data collection involving multiple sources of information rich in context” (1998, p. 61). Similarly, Yin (1984) defined the case study strategy as “[to] investigate a contemporary phenomenon within its real-life context” especially, “when the boundaries between phenomenon and context are not clearly evident.”

The unit of analysis in case studies can be called a “bounded system.” This bounded system is always defined by the researcher. It could be simple, such as a child or a classroom, or more complex, such as an innovative teaching program or national education reform (Merriam, 2002). In this study, the bounded system to be explored is the phenomenon of transnational teacher mobility that happened from more one a century ago to the present day. The bounded system in this study is basically the historical events, programs, or institutions related to teachers who flowed between countries.

The essence of the case study approach is that when the X is a case of Y, and if we want to learn something about Y, we should study X. Following this function of a case study method, for
instance, by studying the Fulbright Teacher Exchange Program, a case of international teacher exchange problems, we can learn more about the phenomenon of transnational teacher mobility in this research. Moreover, because the case study method is detailed enough to examine one setting, a single program, or one particular event, it is appropriate to generate rich descriptive data needed to answer the “why” and “how” research questions mostly posed in this study (Bogdan & Biklen, 2003).

According to John W. Creswell (1998), experts in qualitative research methodology (e.g. Bogdan & Biklen, 1992; Eisner, 1991; and Merriam, 1988) appear to agree that “one undertakes qualitative research in a nature setting where the researcher is an instrument of data collection who gathers words or pictures, analyzes them inductively, focuses on the meaning of participants, and describes a process that is expressive in language” (p.14). Hence, in the qualitative approach, the researcher acts as a key instrument for case selection, data collection and analysis.

Instead of randomly sampling, the method of sampling in this research is a purposeful sampling or “internal sampling” (Merriam, 2002; Bogdan & Biklen, 2003). It is also important to select “information-rich cases” for an in-depth study so that one can learn a significant amount about the issue from the case (Patton, 1990).

In this study, the case selection is purposeful. I particularly looked for a so-called “typical” cases in which the situation is similar to most of the other types, such as the Fulbright Teacher Exchange Program. I also chose an “unusual one,” which is clearly a unique case, such as the first transactional agreement on how to regulate international teacher recruitment, called “The Commonwealth Teacher Protocol.” Moreover, some criteria are also important as my priorities when doing an internal case sampling.

First of all, I intended to select a significant case, such as an important development in the issue of transnational teacher mobility (i.e. commonwealth teacher recruitment protocol). It is an international organization of sovereign states to manage international teacher recruitment through agreed protocols within commonwealth countries. It was also regarded as an important milestone
for regulating international teacher recruitment. Second, I also considered the reputation: a well-known and well-organized program for teacher exchanges, such as the Fulbright Teacher Exchange Program and the JET program. Third, scale is another criteria for case selection, including the number of participants and the number of participant countries. The Visiting International Faculty Program (VIF) was selected as a case in this study because it is the largest international teacher recruitment agency in the United States. So far, it has provided more than 7,000 teachers coming from more than 50 nations. Finally, the case horizons reconstructed from relevant events and programs are considered to be representative of worldviews of the counties under a global context. Countries such as Taiwan, and Japan were selected as a diverse case analysis. According to these criteria, six cases were identified for further analysis (for details, see Appendix A).

Collecting multiple sources of evidence for data collection is part of the triangulation strategy for confirming research findings. A classical and basic typology of triangulation proposed by Norman Denzin (1978) included the following: by theory (multiple theoretical schemes to interpret the same phenomenon); by investigator (multiple observers in the field situation); by data source (multiple sampling strategies in terms of time, space, and persons); and by method (multiple methods to gather data). As Maxwell (2005) pointed out, the triangulation of data collection, a variety of sources and methods, is important for qualitative research because it “reduces the risk that your conclusions will reflect only the systematic biases or limitations of a specific source or method, and allows you to gain a broader and more secure understanding of the issues you are investigating” (pp. 93-94). Robert Stake (1995) focuses on the particular case study research and focuses on the convergence of information through triangulation. Also, Yin (1994) defines case studies as a comprehensive research strategy that relies on the multiplicity of data sources.

Hence, multiple sources of evidence were used to collect data in this study. Documentaries, such as personal, official, and popular culture documents were included for each case. Archival
records as well as academic works are also the primary sources for my data collection. After the cases were chosen, a combination of documentaries, archival records and related academic works from each case were collected. I have created a database for each case, in the form of a computer file. Any relevant material, articles, reports, books, and media programs will be recorded and collected in this database. For example, the database of the Japanese Exchange and Teaching program (JET) will include: the goal, function, and organization of the main institutional actor; the Council of Local Authorities for International Relations (CLAIR); the personal documents, such as Japan Diary: A year on JET by Eric Sparling; official documents, such as the JET pamphlet, published by the Council of Local Authorities for International Relations (CLAIR), which describes the goals, history, statistical data about participants accessed from JET’s official web site, sponsored by the Japanese government; popular cultural documents, such as news reports related to the JET program; as well as academic works in book form, such as Importing Diversity: Inside Japan’s JET program by David McConnell.

II. Method of Analysis

According to Yin (1984), the data analysis in a case study consists of “examining, categorizing, tabulating, or otherwise recombining the evidence.” Data analysis usually starts with reading the data, organizing the data, breaking the data into small units, coding the data, synthesizing the data, and finally looking for patterns (Bogdan & Biklen, 2003). In this study, I used four methods for the data analysis.

1. Identifying the “items”

After data collection, I first read through my database. Certain words, phrases, or patterns repeat and stand out throughout the process of constantly comparing, contrasting, ordering and speculating about the raw data. I took notes and wrote down words and phrases to represent these topics or patterns. These words or phrases are called the coding categories or items. Using the item analysis help me to organize and sort the data from my database. The list of items included (see table 3.1): time (year(s) of event’s occurrence), program goals (individual, household, school,
community, nation, international), number of participants, period of teaching (permanent/temporary), characteristics of participant countries (developed/developing; North/South), characteristics of participants (gender, teaching field, degree level, years of experience), characteristics of organization or agency (profit/non-profit), characteristics of schools (primary/secondary; public/private), levels of institutional actors (private agency/government-related organization/ local authorities/ nation states/ transnational); degree of government involvement (government-led/agency-facilitated /agency-led/agency-provided).

The coding category table is created based on related theories, significant literature, as well as research goals in this study. For example, characteristic of participant countries is divided into less developed or more developed countries. Using this coding system is based on the world system theory use terms such as “periphery” and “core” to represent the world system as a set of mechanisms. This mechanism works for redistributing resources, including nature and human resources like teachers. The other coding category, the degree of government involvement (i.e. government-led, agency-facilitated, agency-led, and agency-provided) of international teacher recruitment is built by the research findings from Buchan, Parkin and Sochalski (2003) who found that the recruitment agencies act as stimulators or active intermediaries in the process of international nurse recruitment.

Moreover, different levels of institutional actors such as the individual, schools, local communities, national government, as well as transnational institutions are useful items for looking at the transition of major institutional actors overtime. And the characteristics of participants (male/female; teaching experience; subjects) and schools (public/private; elementary/high) provide common features for doing further comparisons within and across cases.

2. Analysis from “bottom up”

LeCompte and Schensul (1999) point out that ethnographers use both top-down and bottom-up strategies through their data analysis. In this study I mostly employed the “bottom-up” strategy for my data analysis. The bottom-up analysis is an inductive strategy for collecting
(conducting) items and codes from data and then “assembling” them into patterns. More precisely, the inductive process should include three stages: items, patterns, and structure. These also can be treated as different levels of analysis. So, the “bottom-up” analysis should follow these three levels beginning with the bottom level, item analysis, then the pattern level of analysis and then the top-level structures.

In this study, I started with the item level of analysis. Items are the “units” similar to the code that I have created above, including items such as year of program occurrence, fields of teaching, and profit or nonprofit institutions. After the items were identified, I proceeded to the next “pattern” level by the cognitive process of perceiving items, comparing items, contrasting items, and aggregating and ordering items. Patterns usually consist of collections of items or categories of items that seem to “fit” together. For example, if we compare the item of year of teacher-exchange programs’ occurrence, these programs can be categorized into different time periods, and the items can be “chunked” into the pattern.

However, the counter pattern may be found during this process of date analysis. The strategy to deal with counter cases is to identify the case and try to explain why this case is an exception or, if it is possible. In such a situation, I further modified the pattern to include this case. The top level analysis, “constitution” or “structure,” basically consists of larger groups of patterns or the relationships among patterns. By identifying which variables or factors, such as the role of institutional actors, make different patterns associate with one another, I want to reach the main goal to build an overall theory of explanation of transnational teacher mobility.

3. Cross-Case Analysis

Miles and Huberman (1994) indicate that there are three reasons to do cross-case analysis and why it is important. First of all, cross-case analysis can enhance generalizability, although many scholars (i.e. Denzin, 1983 or Cuba & Lincoln, 1981) may disagree to the use of this term for the goal of qualitative studies. By using multiple cases, typical or diverse, and analyzing carefully, Miles and Huberman believe that this strategy can help us to apply the findings to other
similar settings and make sense from specific cases. Second, cross-case analysis can provide a deep “understanding and explanation.” As Claser and Strauss (1970) argued, using “the multiple comparison groups” to find the structure of the hypotheses is much quicker and easier than the single case. It can help to clarify the specific condition for each case; and more importantly, crossing-case analysis can assist us in developing the general categories from the cross-case comparison. Finally, the cross-case analysis is important because this method can “reconcile” the “tension between the particular and universal.” The uniqueness from each case may happen and develop over time, but it still involves the general principal that the conditions might be related to each other. So, cross-case analysis not only allows us to dig out the individual case’s uniqueness, but also can let us create a more general understanding that occurs across cases.

For the cross-case analysis method, Ragin (1987) clarified that there are two basically different approaches to analysis, including variable-oriented and case-oriented analysis. In variable-oriented analysis, we should focus on variables and their relationships. The variable-oriented approach, in general, is a “conceptual and theory-central” emphasis casting a wide range for a number of cases. Instead of highlighting each case, it puts more effort on comparing variables from each case and looks at the inter-correlations. This approach has advantages for finding probabilistic relationships among variables in a larger population; however, one shortcoming of this approach is that it is difficult to deal with the complexities or specific case developments and more often the findings are too general.

In a case-oriented analysis, we should look at the measure for a particular case. In order to do a case-oriented analysis, we should look at the full story of the case. This approach regards the case as a whole entity. It examines the “configurations, association, causes and effects within the case” and considers and looks for the underlying similar or different features for further explanations. Basically, this approach is good at finding more “specific, concrete, and historically-grounded patterns” in a small set of cases, but the findings by using this approach may remain too “particularistic,” preventing generality.
A mixed strategy of cross-case analysis, combining or integrating the variable-oriented and case-oriented approach was employed as a major method for data analysis in this study. A meta-matrix table was created to display the analysis of each case in depth. Figure 3.1 shows the hypothetical quantitative dataset that influences transnational teacher mobility.

**Figure 3.1 Matrix Table for Quantitative Dataset: Features of Cases**

<table>
<thead>
<tr>
<th>Case</th>
<th>Time</th>
<th>Goal</th>
<th>Driving force</th>
<th>Roles of teacher</th>
<th>Characteristic of school</th>
<th>Developmental level of participant country</th>
<th>Level of institutional actors</th>
<th>Direction of mobility</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Japanese teacher in Taiwan</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Fulbright Teacher Exchange Program</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Peace Corps</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Japanese Exchange and Teaching (JET) program</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. The Visiting International Faculty Program (VIF)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Commonwealth Teacher Recruitment Protocol</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Using the mixed method for cross-case analysis, I first do a variable-oriented analysis. I read the table vertically, focusing on the variable such as the level of institutional actor to
facilitate or prevent transactional teacher mobility from each case. I also examined the variable of teacher’s role in the process of international flow. Moreover, the relationship between some factors, like driving force for transnational migration should be assessed for their relative weight. Rather than just doing the variable-oriented analysis, I also did a case-oriented analysis for each particular case. When I did the case-oriented analysis, I read a row. Instead of just browsing the case superficially, I carefully examined the feature, characteristic, and evidence within each case in order to fully understand the case. For example, in the case of Commonwealth Teacher Recruitment Protocol, I examined its goal and timeframe in detail to understand why this protocol is the first transnational origination of sovereign states to manage international teacher recruitment through an agreed protocol within commonwealth countries. I also laid out the primary goal: to protect the integrity of national education systems to prevent the exploitation of scarce human resources of poor countries and meanwhile to protect the rights of international teachers and increase their working conditions. Moreover, the roles of international teacher flow in this time period are acting more like mass workers or knowledge deliverers.

III. Validity Issue

In order to make this research more trustworthy, it is important to take validity into account (Maxwell, 2005; Merriam, 2002). Validity deals with the issue of correctness or credibility of a description, conclusion, and interpretation (Maxwell, 2005). It looks at whether a researcher measures what the research purports to measure (Wolcott, 2004).

To increase the validity for methodological arguments related to research design, I will use three general standards as guides for validity issues that were created by Eisenhart and Howe (1992), in this study. Standard I: The fit among research questions, data collection procedures and analysis techniques. Following this standard, I will constantly examine the data collection method that I used to see whether it is suitable to answer my research questions. In other words, my research questions should be put in the center and drive the method of data collection and analysis.

Standard 2: The effective application of specific data collection and analysis techniques: this
standard addresses whether the procedures of data gathering and analysis are credible. Following the principle of data collection and analysis, such as using multiple data sources, the conclusion can be effectively applied in a more-or-less situation.

Standard 3: Alertness to and coherence of prior knowledge: the goals and assumptions should be carefully explored and considered and should be put into the context and compared to those of other studies. For example, the research goals of this study may focus on the role of institutional actors after I examine the relevant theories and find out it lacks a theoretical explanation of the role of institution actors in the process of international teacher mobility.

To avoid validity threats from my personal “bias,” three strategies as Maxwell (2005) argued will be used to decrease this validity threaten. Triangulation: I will use multiple sources of data, such as, documentary, archival records, and academic works collected to confirm emerging findings. Peer review: I will discuss findings with colleagues and committee members who are familiar with this topic to help me to examine the raw data and assess whether my interpretations based on the data are believable. Comparison: I will constantly compare the cases within and across time periods. Using the identified relevant characteristics, such comparison not only contribute to the correctness of interpretation, but also address one of the main objections: to find out the pattern from the case within the time period.

IV. Limitations of Study

Two limitations of this study should be considered. One might be the limitation of case selection. From the historical perspective, events, programs, and activities related to the phenomenon of transnational teacher mobility may have thousands of records. In this study, I review relevant literature and studies, and then identify and summarize fourteen events and programs as important cases for further exploring. However, because of the limitation of time and resources, I can only select and analyze six cases based on certain criteria that I create for the in-depth study. Some important cases might be omitted during the process of case selection.

Another challenge in this study is the language issue. Some historical documents and
archival records might be written in different languages. I may only try to find and rely on translated documents in English or Chinese. In some cases, there are no translated versions to use. For example, some historical documents written in Japanese that record the events of Japanese teachers teaching in Taiwan are difficult to read. So, documents written in different languages will be put aside or discarded, although the documents and archival records may contain important information for this study.
Chapter Four: Data Collection and Analysis

This chapter consists of six cases: Japanese teachers in Taiwan during the colonial period, 1895-1945; Fulbright Teacher Exchange Program (FTEP); Peace Corps Program (PCP); Japan Exchange and Teaching Program (JET); Visiting International Faculty Program (VIF); and The Commonwealth Teacher Recruitment Protocol.

Each significant case will be carefully examined in detail. Multiple sources of evidence will be collected and analyzed in this chapter. Documentaries and archival records as well as academic works are the primary sources for my data collection. Any relevant material, articles, reports, books, and media programs are recorded and collected in this database, in the form of a computer file. By analyzing historical, cross-national and other forms of data, I will provide historical and social contexts, the program’s goals, the historical period, the teachers’ roles and the degree of state involvement for each case, as indicators for continual comparisons. Critiques as well as implications from each case will also be included for further analysis. Although each case may have its own historical backgrounds, ambitions and goals as well as storylines, I would like to point out the patterns, trace the trajectory as well as find the transformation of transnational teacher mobility overtime.

I. Case #1: Japanese Teachers in Taiwan during the colonial period, 1895-1945

Historical and Social Backgrounds

After Qing China was defeated in the Sino-Japanese War in 1895, Taiwan was ceded to Japan under the Shimonoseki Treaty. Thereafter, Taiwan was the Japan’s first colony and Japan became the first non-Western state to join the nineteenth-century colonial powers. Because of the debut of colonization, the Japanese government felt that all eyes from the West were upon them. Japanese rulers believed that the conduct on the island would be compared to European colonial territories in other parts of the globe. Based on these outside pressures, the Japanese government had determined that Taiwan should become a model colony. As Goto Shimpei (1859-1929), the
key administrator of Taiwan during the early Japanese colony year, reported to an English-speaking world, they intended to develop Taiwan as a territory to be “well-regulated, economically productive, as well as inhabited by a peaceful, industrious population” (Tsurumi, 1977).

According to Chen (1983), there are four explicit or implicate goals advocated by the Japanese government to join the colonizers: military strategy, emigration, economic development, and political integration. The military goal is to build the colonies into defense outposts of the empire and for military expansion. Japan had aspired to become a world power equal to the Western nations since the Meiji Restoration. For emigration purposes, Japan intended to make the colonies places for her build the population. For economic development, Japan wanted to develop the colonies as foodstuff and raw material suppliers by investing and providing the colonies with capital and technology. The final and ultimate goal was to develop and build her colonies as part of Japan by assimilating the native population through education (Chen, 1983).

The goal of becoming a colonial power may clear enough, however, how to govern their new island was still vague at that time. Before making the decision for Japanese colonial policies for Taiwan, there existed two different options that were up for debate. The first option was to integrate Taiwan into the Japanese state and extend the rights and duties to Taiwanese as Japanese citizens. The rights and duties of citizens were set out in the Japanese Constitution. Hara Takashi (1856-1921) was the most active supporter of this option. He believed that Japan should regard Taiwan as an integrated part of the motherland. He was against the notion that Taiwan should be treated as a so-called “colony”; his reasoning was that there existed relative contiguities and ethnic affinities between Japan and Taiwan. In his statement, he preferred a type of model such as those of Alsace and Lorraine, which were parts of Germany and Algeria, which was a part of France.

The alternative option of colonial policy was to make the new territory totally different and separate from the homeland of Japan. Montague Kirkwood, a British lawyer, was an eager
supporter of this option. He believed that the Japanese government should follow the British
colonialism style: an exclusive approach based on cultural and ethnic dissimilarities. He
recommended this to Prime Minister It Hirofumi (1841-1909). This recommendation was highly
valued by Goto Simpei, who became the Director of Civil Administration of the colonial
government of Taiwan (Komagome & Mangan, 1997).

These two options echoed Mark Peattie’s (1984) viewpoint that the political process of
interaction between the colonial ruler and the ruled has existed with two significant, but
contrasting attitudes throughout their historical and culture backgrounds: the racially exclusive
approach and the aggressive integrative approach (Komagome & Mangan, 1997). But no matter
what colonial policy the Japanese government adopted, one somewhere between the two options
or adjusting them over time, the ruling of Taiwan was much harder than they expected because
Japanese colonizers were facing a society with a culture and language they knew very little about
(Tsurumi, 1977). As Li Hung-chang (1823-1901), the Qing representative in the signing of the
Shimonoseki Treaty, had warned, the Japanese would be troublesome if they wanted to rule
Taiwan because, in his point of view, Taiwan was as “uncultivated” land outside of Chinese
civilization although Taiwan had been under the region of Qing China for more than two
centuries (Fewing, 2004).

Colonial Policy, Educational System and Transnational Teacher Mobility

Historians, in general, have divided the Japanese colonial period in Taiwan into three
major stages based on significant events: The early years (1895-1915), “Integration” (1915-1937),
and “Subject of the Emperor” (1937-1945) (Tsurumi, 1977). The following will examine in detail
the implementation of colonial policy, the establishment of the educational systems, as well as the
phenomena of transnational teacher mobility and the recruiting of teachers from the metropolis of
Japan during these periods.

Phase I: The early years (1895-1915)

The early years refers to the period between when the Japanese forces arrived in May
1895 and the Tapani incident in 1915. Because the resistance to Japanese rule was high and the Governor-General was held by a military general during this period, the colonial policy emphasized suppression of the insurgency. The Japanese colonial policy toward Taiwan during this stage mostly followed the approach supported by Goto Shimpei, as chief of Home Affairs. Goto’s concern about colonial policy in Taiwan was regarded as a means of international diplomacy. By showing the Europeans as efficient and benevolent colonial rulers, Japan could have its status raised in the world. As a follower of Social Darwinism, he believed, the natives could not be completely assimilated. Thus, he believed that Taiwan would never be governed exactly the same as the homeland. Based on this point of view, he felt that Japan should follow the British model, governing Taiwan as a whole new territory under a new set of laws.

His approach continued to be the main policy during his tenure between March 1898 and November 1906. During this period, the Japanese government was authorized to pass special laws to be free from all constitutional limitations. With this absolute power and while enlarging the executive and military might, the colonial government suppressed any dissent to maintain social stability. For example, the Japanese government established a hoko system, as a crime reporting network. It was part of the police system to exercise tight social control over every household. Ten households formed a ko and ten ko, 100 households, was named a ho. If a crime happened and was not reported within the hoko area, the entire group of people would be punished.

When the Japanese arrived in Taiwan on May 30, 1985, with the inauguration of Japanese colonial rule in Taihoku (Taipei), a grassroots resistance occurred all over the island. Because of the lack of direction of colonial policies in the very beginning, military suppression became the main option for the administration for the first three years. With this heavy-handed strategy, according to Ide Kiwata (1937), there were 8,030 Taiwanese rebels captured and another 3,473 who were executed between 1897 and 1901. Official documents also reveal that from 1895 to 1902, the number of Taiwanese rebels killed totaled 32,000, about one percent of the total Taiwanese population. However, this militarism also cost the Japanese police and army members.
By 1915, there were about 10,000 Japanese who died in the suppression of rebels; this number exceeded those who died in the Sino-Japanese War in which about eight thousand Japanese military were killed (Fewing, 2004).

Since the anti-Japanese activities ran high, the new rulers gradually realized that armed force alone would not fully rule the new territory. Civilizations should be introduced to the concept of keeping order and education should play an important part in these plans. According to Tsurumi (1977), the task of Japanese education in Taiwan has two goals: to “instill loyalty to Japan in the minds of all natives” and to “provide them with skills and the discipline needed for the development of the colony” (p.212). Education would secure the cooperation of the natives and perhaps eventually assimilate them. Schools, as Tsurumi pointed out, like soldiers, would help control the people since education acts as an ideological arm of the military. Public education was seen as an important instrument of fundamental social, political, economic, and culture change. It was stated that with the power of education, it can transform a “segment of traditional China” into an “integral part of modern Japan” (Tsurumi, 1977).

As part of the colonial government's overall goal of keeping the anti-Japanese movement down in the early stages, public education became an important mechanism for facilitating the implementation of control policy. Since there were very few native teachers who understood the Japanese language and knew how to teach in this Western-style primary school, sending trained Japanese teachers to Taiwan became the first priority to run this new education system.

Thirty-six teachers were recruited from Japan to teach in sixteen Japanese language schools, established by Isawa Shuji in 1895. Isawa Shuji, on the basis of studies in the United States, was an expert in music education and gymnastics. He was a strong supporter of “state education,” believing that all education should be financed by the state. Disappointed with the central government cutbacks to local elementary schools during the 1890s in Japan, he viewed Taiwan as a place to make his dream come true. When appointed as the first in charge of colony educational affairs, he opened tuition-free Japanese language schools for natives regardless of
their class, age, or sex. He believed that the Taiwanese should master the Japanese language in order to gain higher academic training. He also proposed to establish three normal schools, at the post-elementary level, to train the Taiwanese as qualified teachers to teach in his Japanese language elementary schools – the first Western-style primary schools in Taiwan.

These thirty-six trainees, imported from Japan, all graduated from Japanese normal schools. However, because he knew nothing about the Taiwanese local language, Izawa required them to take six weeks of Taiwanese dialect training before they could assume their positions. With this intensive language training, he believed that they could learn the basic Taiwanese conversational language that they may need to hold classes.

Unfortunately, the proposal of state-financed public universal elementary schools for all Taiwanese from Izawa failed again because of financial constraints in 1897. The plan that through compulsory education they would totally assimilate with the Taiwanese and be provided elite educational opportunities was discarded by the fourth governor-general, Kodama Gentaro and his chief civil administrator, Goto Shimpei.

Instead of providing an all-out effort toward universal free elementary education for the Taiwanese, Goto organized Izawa’s Japanese language elementary schools into a system of common schools, shifting the cost of schools directly onto the local consumers. Unlike the previous elementary schools being open for all native children, the common schools were for the children of those Taiwanese wealthy enough to support these institutions. In order to attract the Taiwanese gentry, parents to send their children to common schools, this six-year common school course consisted of classical Chinese (composition, reading, calligraphy), Japanese language, arithmetic, music, and gymnastics. Manual arts, agriculture, and commerce were introduced as optional subjects; they were never taught in the traditional Chinese private schools in existence in Taiwan for hundreds of years.

In addition to transforming the Japanese language elementary schools into common schools, Goto closed two of Izawa’s normal schools to natives in 1902. This was a major part of
Izawa’s original education proposal of creating normal schools to train Taiwanese as Japanese language teachers. Three normal schools, according to Izawa’s plan, were opened in 1899 located in the biggest cities in the north, middle and south of Taiwan. This three-year course included ethics, Japanese language, composition, reading, arithmetic, bookkeeping, geography, history, science, calligraphy, music, gymnastics, and pedagogy just like the subjects that were taught in contemporary Japanese normal schools. About 150 Taiwanese students were admitted in the first year. After three years, the normal schools were abolished because the authorities wanted to carefully regulate the numbers of people admitted to teacher training courses for the Taiwanese. It may have also been because they wanted to prevent any general demand for higher education among the Taiwanese.

Table 1 shows the number of common schools established and the number of teachers in the beginning of this early stage. In 1898, seventy-four common schools were established and staffed with 247 teachers; by the end of Kodam’s term in 1906, the number of common schools increased to 181 with a total of 752 teachers. Although the nationality of the teachers was not available from historical documents, the teachers in common schools during this period mostly consisted of teachers recruited from Japan with formal teacher training. This assumption is based on the fact that teachers in common schools had to teach Japanese language, and the fact that there was a lack of Taiwanese teacher labor because of the shutdown of teacher training schools.
Table 4.1. *The Number of Teachers in Common Schools, 1898-1906*

<table>
<thead>
<tr>
<th>Year</th>
<th>Common schools (including branch schools)</th>
<th>Teachers</th>
</tr>
</thead>
<tbody>
<tr>
<td>1898</td>
<td>74</td>
<td>247</td>
</tr>
<tr>
<td>1899</td>
<td>106</td>
<td>371</td>
</tr>
<tr>
<td>1900</td>
<td>126</td>
<td>485</td>
</tr>
<tr>
<td>1901</td>
<td>136</td>
<td>547</td>
</tr>
<tr>
<td>1902</td>
<td>154</td>
<td>608</td>
</tr>
<tr>
<td>1903</td>
<td>161</td>
<td>709</td>
</tr>
<tr>
<td>1904</td>
<td>168</td>
<td>676</td>
</tr>
<tr>
<td>1905</td>
<td>167</td>
<td>700</td>
</tr>
<tr>
<td>1906</td>
<td>181</td>
<td>752</td>
</tr>
</tbody>
</table>


For those children of Japanese nationals in the colony, Goto Shimpei erected primary schools, equipped with better educational facilities, better teaching, and better textbooks, comparing with those provided for Taiwanese children. The Japanese government created these schools in order to make an attractive Japanese community in Taiwan for those who had crossed the sea to work. As a result, from 1898 to 1919, two kinds of schools were continually established and segregated by ethnicity. The common schools were established for Taiwanese children and the primary schools were restricted to school-aged children of Japanese nationals (Chen, 1970).

The implementation of segregation and a tracking education policy made it seem as if the Japanese government abandoned their goals of total assimilation. However, according to Tsurumi’s (1997) observation, the Japanese government did not give up their goal of assimilation. Rather, they felt that they wanted to preserve segregation until the time when the Taiwanese become completely assimilated. They just wanted to assimilate the Taiwanese as “faithful Japanese followers” but not “Japanese leaders.”

*Phase II. Integration (1915-1937)*

The second period of Japanese rule is classified as the period between the end of the 1915
Tapani Incident and the Marco Polo Bridge Incident of 1937. During this period, World War I happened and changed the perception of colonialism in the Western world. Waves of nationalism and the ideas of self-determination rose among the colonial territories. Hence, the colonial government began to make more concessions and became more liberalized. Meanwhile, the political climate in Japan was changing. The Japanese government gradually democratized and election has expanded to include all adult males by 1925 during the Taisho period (1912-1925).

One significant development during this stage was that Tokyo dispatched the first civilian governor-general to Taiwan. Some historians also called this period the Civilian period, because the power of the governor-general was highly centralized. The background of each governor-general could heavily affect the direction of colonial policy in Taiwan. In 1919, Den Kenjiro was appointed to be the first civilian governor-general of Taiwan. He was a follower of Prime Minister Hara Takashi’s colonial policy believing that Taiwan should be treated as an extension of the homeland. He believed that the Taiwanese, like the Japanese, should be educated to understand their rights and duties.

This new “Doka” (assimilation) policy was formally announced in October 1919 and continued by the Japanese government for the next 20 years. With this policy, local governance was established and an elected advisory committee was included. A public school system was created and the idea of democracy was introduced to the Taiwanese and finally assemblies were allowed in 1935.

Regarding the change of the school system during this period, post-elementary academic schooling was gradually opened to Taiwanese. Secondary vocational schools and even specialized colleges for the Taiwanese to be trained in agricultural, forestry, commercial, and trades were founded. For example, in 1915, the colonial government allowed the colony’s first middle school for Taiwanese boys to be built at Taichu, although the standards of the middle school were much lower than that of Japanese middle schools. This permission to develop Taiwanese middle schools may have occurred because of the Taiwanese pressure. By 1915,
Taiwanese leaders lobbied for a public middle school, but the labor power needed to support their public and private industries.

According to the Education Ordinances of 1919, the Japanese government promoted “racial co-education” at the post-elementary level, an integrated schools system for Japanese and Taiwanese. It allowed competition between the Japanese and Taiwanese; however, the Taiwanese remained far disadvantage in comparison to the Japanese. One example was that the entrance examinations were in Japanese; as a result, few Taiwanese could afford secondary schooling.

Under the new education law announced by Den’s administration in 1922, the educational system in Taiwan was supposed to integrate and Taiwanese children were to receive equal treatment. The previously prestigious primary schools only open to Japanese nationals were made available to Taiwanese children with fluency in the Japanese language. Taiwanese children without fluency in the Japanese language continued to attend common schools. According to Tsurumi (1984)’s analysis, this “Japanese language backwardness,” intentionally or unintentionally, provided a convenient selection mechanism to restrict Taiwanese youngsters’ admission from entering better-equipped schools.

Although this selection was based on skills in Japanese language, the Den government tried to bring the common school curriculum closer to that of the primary schools, original designed for Japanese children. At the same time, the colonial government expanded the compulsory education for Taiwanese not only in the quantity of schools but also in the rate of school enrollment. For example, during Den’s tenure from 1919 to 1923, the number of common schools designed for Taiwanese children increased from 438 to 715; the school-aged population attending these common schools doubled.

This new policy also mandated that all post-elementary facilities must be integrated. Secondary and high schools were to be equally open to Japanese and Taiwanese. However, the fact of ethnic origins remained; only very few native islanders were able to enter the formerly Japanese elite institutions because the Japanese who controlled school admissions did not easily
give up their long-standing interests in the Japanese population. For example, the number of Taiwanese and Japanese students in higher course in the high schools was 4 and 102 in 1925, respectively. In 1941, the Taiwanese and Japanese student ratio was 1:3. As a result, it is relatively easier for wealthy Taiwanese families to send their children to Japan to get into prestigious schools than to gain admittance to the ones in the colony (Tsurumi, 1977).

Table 4.2. Number of Japanese and Taiwanese teachers in common schools, 1923-35

<table>
<thead>
<tr>
<th>Year</th>
<th>Japanese</th>
<th>Taiwanese</th>
<th>Year</th>
<th>Japanese</th>
<th>Taiwanese</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Male</td>
<td>Female</td>
<td></td>
<td>Male</td>
<td>Female</td>
</tr>
<tr>
<td>1923</td>
<td>1,341</td>
<td>277</td>
<td>1925</td>
<td>1,446</td>
<td>259</td>
</tr>
<tr>
<td>1924</td>
<td>1,601</td>
<td>290</td>
<td>1927</td>
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</tr>
<tr>
<td>1928</td>
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<tr>
<td>1934</td>
<td>2,510</td>
<td>603</td>
<td>1935</td>
<td>2,510</td>
<td>603</td>
</tr>
</tbody>
</table>

Ratio (Japanese: Taiwanese)

1: 2.13  1: 1.92  1: 1.70  1: 1.57  1: 1.38  1: 1.19  1: 1.00

The final period of Japanese rule in Taiwan began during the outbreak of the second Sino-Japanese War in 1937 and ended with the Second World War in 1945. With the intensification of the war, Taiwan’s strategic position was regarded as an important fort for further expansion into South-East Asia. It is also important that Japan could use resources and material from Taiwan in the war. Based on above, the complete cooperation of the Taiwanese was essential and full assimilation became an urgent. As a result, the colonial government devoted its efforts to the “Kominka movement” as an ultimate goal, to transform the Taiwanese into becoming imperial Japanese subjects, during this final period.

Aimed at fully “Japanizing” Taiwanese society, the earlier social movements were
banned and the new governor-general was again held by the military officers. In order to reach the goal of “cultivating imperial subjects,” the colonial government began to strongly encourage locals to speak the Japanese language, wear Japanese clothing, and live in Japanese-style houses. In 1940, laws were also passed to advocate that the Taiwanese should adopt Japanese names. The main goal of the “Kominka movement” was to weaken the ethnic consciousness of the Taiwanese and disconnect the Taiwanese from their traditions and way of life. In order to build Japanese identity among the natives, all culture and political movements related to Taiwan-centered issues were banned by the Japanese colonial government. For example, in 1937, the teaching of classical Chinese was prohibited in common schools. Chinese columns in newspapers and the broadcasting of Taiwanese on the radio were gone by 1938, and so were the Taiwanese indigenous operas. As part of the movement, the Japanese government began to encourage the Taiwanese to volunteer for the Imperial Japanese Army and Navy in 1942.

The education system was finally desegregated in March 1941, when all schools (except for a few aboriginal schools) were renamed as National Schools, open to all students regardless of ethnicity. Education was compulsory for children between the ages of eight and fourteen. Subjects taught included Morals, Composition, Reading, Writing, Mathematics, Singing, and Physical Education. By 1944, there were 944 primary schools in Taiwan. The total enrollment rate for Taiwanese children was 71.3%, comparing with 99.6% for Japanese children in Taiwan. After a fifty-year government, primary school enrollment rates in Taiwan were the highest in Asia, only behind Japan itself (Tsurumi, 1977).

II. Case #2 Fulbright Teacher Exchange Program (FTEP)

Historical and Social and Global Backgrounds

After World War II, the form of global teacher mobility can be exemplified by teacher-exchange programs, which are typically instituted in order to broaden the understanding of other nations’ cultures, customs, and languages. One of the most prestigious international educational exchange programs is the Fulbright Exchange Program. This well-known international
An educational exchange program was created by United States Senator J. William Fulbright in 1946. He believed that the exchange of scholars, educators, graduate students and professionals in science and technology and arts and the humanities fields, is one of the most essential vehicles to promote mutual understanding among individuals, institutions, and future leaders. The Fulbright Program aims “to increase mutual understanding between the people of the United States and the people of other countries by means of educational and culture exchange; and thus to assist in the development of friendly, sympathetic, and peaceful relations between the United States and the other countries of the world” (Bureau of Cultural and Educational Affairs, 2004).

One of the most significant developments of the Fulbright Program was the growing willingness of other governments to join this program. On March 23 in 1948, the oldest operating Fulbright program in the world was established in the Philippines, called the Philippine-American Educational Foundation (PAEF). The first participants included 47 Americans and 36 foreign nationals exchange from China, Burma, and the Philippines in 1948. New Zealand, the United Kingdom, Belgium and Luxembourg, France, Italy and Netherland, and Norway also joined these bi-national agreements of the exchange program in 1948-49. Additionally, seventeen countries participated in this program before 1952. For the academic year 1952-53, there were 1,253 Americans and 2,210 foreign nationals in this program. By 1971, Fulbright programs were operating in 45 bi-national commissions and 56 additional countries. And the total number reached 104,021. There have been 67,842 foreign grantees and 36,179 Americans, since the program’s inception. There were 120 countries that participated and the number of grantees grew to 152,371 by 1985. Today, this program is operating in 141 countries and 51 commissions and there have been over 300,000 alumni since Fulbright program establishment. Each year, about 7,000 new grants are awarded, for study in a variety of fields, including MBA awards, filmmaking, sports science, performing arts, science, politics, history, literature and dance (Dudden & Dynes, 1987; US-UK Fulbright Commission, 2003).

Political Rationales
In order to better understand the roots of the creation of the Fulbright Program in American, it is necessary to put this program into context. Lima (2007) approaches this issue from a political perspective and points out that the reason of the establishment of the Fulbright program is highly related to the US national interest. He argues that American policy makers created this program with practical and strategic concerns for the national interest of the United State. In the post-World War II period, the US was interested in “legitimizing” and “consolidating” its role as the new hegemony of the world. In order to earn admiration and respect from its allies and the new independent countries, it was necessary to promote a broader and deeper understanding of the country policies. With this more accurate and sympathetic understanding of other countries, the United States could lead and exercise its foreign policy more effectively. In short, America needed to expand its understanding of other nations to win their supports as well as to maintain its leadership in world affairs. Hence, the United States needed to create more systematic and long-lasting relations with other countries by using instruments such as the Fulbright Program (Lima, 2007).

In Eide’s theory, the transnational movers, like students, teachers, and scholars, can be treated as a “culture carrier,” playing a key linkage between cultures for mutual understanding. This theory explains how misconceptions or stereotypes can be reduced through international educational exchange programs, such as Fulbright programs. International exchanges function as culture carriers in two ways when people go to a foreign country: first, they carry with them their home culture, which is acquired in the home country, and pass it on the host country during the exchange period; second, they will learn and experience the culture of the host country and will pass those experiences on when they return in their home country (In Eide, 1970).

According to Marshall (1988), the impact that the host culture makes on the international movers is frequently stronger than the impact that the home culture that they pass on to the host country. One of the main reasons is because the host society allows the culture exchangers to develop a more differentiated and sophisticated image of the host country (Marshall, 1988). It is
also because culture exchangers experience daily events, which impose a way of thinking, believing and understanding (Marshall, 1988). As a result, the transnational mover’s attitude about host the country will create a more accurate image rather than over-simplified stereotypes. Based on this, the international educational exchange designer should notice and realize that the transnational movers form their images about the host country in their everyday lives during the exchange period. More importantly, they will carry this sophisticated image of the host country when they return to their country and report this revised image to people they know in their home county.

From this viewpoint, it is important to select the “right” people that government needs to “spill-over” the effect, especially if the country intends to increase the understanding about their culture via the international exchange program. Ideally, potential leaders or educators should be the most welcomed candidates. For example, teachers or lectures in schools or academia have many more opportunities to pass on their impressions upon their students in the classrooms. The ideas and values that they have acquired in the program of international educational exchanges, can influence a large number of people, thereby reach political goals (Lima, 2007).

The Fulbright program gained importance in its role to fight the communist ideology under the influence of the Soviet Union during the Cold War period. According to the approval of the US Information and Educational Exchange Act in 1948, the Fulbright program administered by the International Information Administration emphasized its propaganda. As a result, this program became an important instrument of propaganda to use American Fulbright grantees to persuade people in foreign countries to support American foreign policy (Richmond, 2003).

However, the use of international education and culture exchanges for propaganda purposes became a cause of debate. Senator J. Fulbright, the founder of Fulbright program, had a deep aversion to associating it with propaganda activities. He was opposed to the Fulbright program being a propaganda tool to re-build the image of the United States and sell it to foreign people. Instead, he affirmed that an exchange should have “pure” purposes to advance
scholarship and believed there was nothing obscure about the objectives of the educational exchange (Johnson and Colligan, 1965).

**Idealist or Social-cultural Rationale**

Rather than the force driven from political rationale, Wit states that the Fulbright program represented a rationale for international education efforts, the idealist or the socio-culture rationale (Wit, 2002). This rationale represents the “the desire to build a better world by increasing understanding of different cultures and fostering cooperation among nations and institutions.” Hence, the government programs, such as the Fulbright program, to promote the mutual understanding of U.S. citizen to citizens of other nations can fall under the rubric of international education.

The international education movement in the United States began after World War I, as an “idealistic movement to use education as a way to eliminate war,” (Mestenhauser, 2000). At this stage, international education focused on the formation of international originsations, such as the Institute for International Education (IIE) and used government funds for the development of many international relations courses at the higher education level. The goals of these efforts were to reduce conflict by providing opportunities for U.S. citizens to learn about people from other countries.

After World War II, the U.S. government recognized the need to understand other cultures as a means to achieve its national goals. In order to promote this culture understanding, the U.S. government and non-government foundations provided increasing culture-related courses at the university level as well as courses focusing on language studies. Also, the creation of programs, such as Fulbright, at the national level helped to opened U.S. and foreign borders to university students, academic scholars, and K-12 teachers as a way to promote mutual understanding between the U.S. and other countries.

The history of U.S. international education efforts in the World War Era are represented by the development of the Institute for International Education (IIE), an independent non-profit
organization and one that is among the world’s largest and most experienced international
education and training organizations. It was established in 1919, in the aftermath of World War I.
The founders believed that there could be no lasting peace without greater understanding among
nations. International educational exchange provides and fosters such understanding (IIE, 2009).

IIE began organized student exchanges with several European governments as well as
faculty and teacher exchanges during the 1920s. IIE President Stephen Duggan persuaded the U.S.
government to create a new category of nonimmigrant student visas, bypassing post-war quotas
set in the Immigration Act of 1921. The Institute published the first reference guides to
international study and created a climate for international education on campus with the
establishment of a network of International Relations clubs. In the 1930s, IIE established the
Emergency Committee to Aid Displaced German Scholars to help to find lectureships for
hundreds of European refugee scholars. IIE also assisted those fleeing from Spain and Italy. IIE
opened the first exchanges with the Soviet Union and Latin America. In 1946, the Institute was
invited by the U.S. Department of State to administer the faculty component of the Fulbright
Program, the largest IIE program, which still operates today (IIE, 2009).

IIE was created to act as a catalyst for educational exchange to meet a need for a contact
and source of information for both U.S. education and foreign nations. The missions of IIE
includes: 1) promoting closer educational relations between the people of the United States and
those of other countries; 2) strengthening and linking institutions of higher learning globally; 3)
rescuing threatened scholars and advancing academic freedom; 4) building leadership skills and
enhancing the capacity of individuals and organizations to address local and global challenges.
These initial goals still remain to this day (IIE, 2007). The main sponsors of IIE include: U.S.
Department of State, U.S. Agency for International Development, U.S. Department of Energy,
World Bank and so on.

*The Fulbright Teacher Exchange Program (FTEP)*

The Fulbright Teacher Exchange Program (FTEP), establish in 1946, is a sub-program
that falls under the Fulbright Program. Full-time U.S. K-12 teachers and administrators as well as community college faculties are eligible to have opportunities to directly exchange positions, as well as one-way assignments with teachers in other countries, who teach the same subjects at the same levels, for one year, one semester, or six weeks. Each year, approximately 200 U.S. teachers are awarded and roughly 400 U.S. and International teachers participate in FTEP. In 2004-2005, 520 teachers exchanged with 30 countries worldwide through FTEP. Since FTEP’s inception, more than 2,300 teachers and administrators from approximately 31 countries have participated, contributing to the goals of mutual understanding between the United States and countries around the world, and increasing international partnerships (U.S. Department of State, 2005).

FTEP is sponsored by the Bureau of Educational and Cultural Affairs (ECA) of the U.S. Department of State. Under the agreement with ECA, the International Institute of Graduate, U.S. Department of Agriculture (Graduate School, USDA) administers the FTEP, cooperating with the William Fulbright Board of Foreign Scholarships, an independent organizations that set up the criteria to achieve the Fulbright goals. The graduate school, USDA has the responsibility to annually arrange for interviews for prospective participants, to select their applications, collect house documentation, prepare publications, and arrange FTEP orientations for participants. For participants from outside the U.S., the U.S. bi-national Fulbright Commissions, Foundations, or other agencies manage the process of the teacher exchange. The FTEP is funded by appropriations from the U.S. Congress. Some foreign governments or private organizations share the costs of FTEP including a salary and travel supplement (U.S. Department of State, 2005).

Selections and Participants

The specific criteria for applicants to the FTEP is the following: be a U.S. citizen; be fluent in English; hold at least a Bachelor's degree, have a current full-time teaching assignment in the U.S. and be in at least the third year of full-time teaching (Fulbright Teacher Exchange program, 2009). In addition, criteria for FTEP includes a match between U.S. teachers’ teaching levels and subjects with those of international candidates. The process to select suitable
candidates and to match them with other international teachers is a two-step process. During the first step, applicants are reviewed by the Fulbright Branch of the U.S. Department of State and then take part in an interview conducted by a Peer Review Committee of the U.S. Peer Review Committee. This committee consists of former FTEP participants, teachers, and administrators. They conduct one-hour long interviews to determine each applicant’s qualifications, motivation, and commitment to the program. In some cases, candidates are also reviewed regarding their foreign language skills if some countries require teachers with foreign language competency.

The second step is the matching process of U.S. teachers and international counterparts. Overseas bi-national Fulbright Commissions involve and operate to match international teachers, cooperating with U.S. embassies and other agencies. Once decided for an exchange or one-way assignment, each award recipient is assigned to a U.S.-based Program Officer in ECA and in the Graduate School, USDA, as well as on the board of Fulbright Commission. Before departure to the U.S., FTEP participants are required to attend the FTEP August Orientation Workshop in Washington, D.C. They are provided with time to meet with their exchange partners and gain more information through numerous workshops to prepare for successful teaching and living abroad.

**Evaluations and Implications**

In 1999, the U.S. Office of Policy and Evaluation of the Bureau of Educational and Culture Affair of the U.S. Department of State contracted with SRI International, an independent research organization, to conduct a formal report to evaluate the U.S. Fulbright Scholar Program, as part of a Congress-mandated evaluation requirement. The purpose of this study was to evaluate whether the program was accomplishing its legislative goal, to increase mutual understanding between the U.S. and other nations. The IRS International Report indicates that there is strong qualitative and quantitative evidence showing that the Fulbright Scholar Program is achieving its legislative mandate (SRI International, 2002).

According to this report, participants (N=801) in the program had positive effects both
professionally and personally. The Fulbright Scholar Program experience was most valuable in that participants not only taught or conducted research, but also interacted with peers and students as well as people in the host country, sharing and gaining new ideas and perspectives about others and themselves. They also brought these new viewpoints from the host country into their academic fields and personal activities when they returned to the U.S. (SRI International, 2002).

Although this report focused on the Fulbright Scholar Program, one of many Fulbright programs, the results of this study indicate that FTEP will have a positive impact on teachers because one can argue that FTEP teachers are more fully immersed in the foreign culture. In the exchange position, U.S teachers have a chance to live and work in different cultures and education systems, which can benefit them, the schools, as well as the communities. Individual teachers can increase their understanding of the host country, the language, and the academic field and gain new perspectives. They also can be exposed to new teaching methods, develop new curricula, and share professional expertise as well as develop lifelong friendships and professional relationships with the international community of Fulbrighters.

Schools can increase global awareness on the part of students taught by international exchange teachers and by the returning Fulbright teacher. Schools can also increase knowledge and international awareness on the part of professional colleagues through interactions with exchange teachers and providing opportunity for students to learn foreign languages from native speakers. This can also develop a long-term professional relationship between the U.S. and the foreign school. In addition, the presence of an international teacher and his or her family is another important resource in the community. They provide the whole community the opportunity to learn about another nation and increase their awareness of diversity of ideas, values, worldviews, and ways of life (Fulbright Teacher Exchange program, 2009).

The federal involvement and funding for international education exchanges have become prevalent among developed countries since 1960s. This form of program facilitated transnational teacher mobility, which reached its peak between 1960 and 1980. Because of the tension between
countries that rose during the Cold War period, governments started to create cultural exchange programs in order to improve the relationships between counties. Exchange teachers acted as ambassadors or culture carriers, not only to immerse themselves in the different cultures and bring this back to their home countries, but also to introduce their own cultures to students, teachers, and other people in the destination counties. This phenomenon can be observed in many countries, particularly in developed countries during this era. For example, the Canada Educator Exchange Foundation (CEFF) was founded by the government to “broaden [the] understanding of one another’s cultures, customs and languages” through an educator exchange. Also, the German Teacher Exchange program (GTEP), established in 1986, provided German teachers with the opportunity to teach in the United State. Similar programs, such as the ISSL teacher exchange program, can be found in New Zealand.

III. Case #3 Peace Corps Program

*Historical, Social and Global Backgrounds*

The Peace Corps program was established by Executive Order 10924 on March 1, 1961, and was authorized by Congress on September 22, 1961. It rooted from an impromptu speech on October 14, 1960, presidential candidate and then-senator John F. Kennedy call on students at the University of Michigan to volunteer to serve for one or two years in the developing world. Within weeks after his speech, more than 1000 students signed and supported the ideas, which became the Peace Corps. In 1961, the Peace Corps Act was approved by the Congress. In 1962, programs begin in 27 new countries, such as Afghanistan, Belize, Cyprus, and Ecuador. This year, at least 2,816 volunteers were in the field. In 1966, more than 15,000 trainees and volunteers are serving in developing world, reaching a historical highest number of Peace Corps participants. In 1977, Carolyn Robertson Payton was the first female and African American to be a Peace Corps director. 1985 is the first year that more women than men join the service since its inception (Peace Corps, 2002). In the year 2009, President Obama signs $400 million budget to operate this program in 2010 fiscal year, the largest budget since it established.
Peace Corps was designed to promote world peace and friendship by sending volunteers living and working in the developing counties in the areas of Africa, Asia, the Caribbean, Central and South America, Europe, and the Middle East. As the act declares, the program's purpose is:

To promote world peace and friendship through a Peace Corps, which shall make available to interested countries and areas men and women of the United States qualified for service abroad and willing to serve, under conditions of hardship if necessary, to help the peoples of such countries and areas in meeting their needs for trained manpower.

More specifically, the missions of the Peace Corps included: 1. Helping the people of interested countries in meeting their need for trained men and women. 2. Helping promote a better understanding of Americans on the part of the peoples served. 3. Helping to promote a better understanding of other people on the part of Americans. The U.S. government runs this Peace Corps program with around a US $ 400 million annual budget. Since its inception, Peace Corps program have reached several milestones. Over 200,000 Americans have committed to working abroad over 139 countries. Current number of volunteers is 7,671 this year. More than 20 countries are still on waiting list for program. The average age of volunteers is 28. However, number also shows that 275 volunteers have died while serving since 1966 (Peace Corps, 1995).

Generally, volunteers work for a period of twenty-seven months and are involved in areas including education (35%), health & HIV/AIDS (22%), business development (15%), environment (14%), agriculture (5%) and youth development (4%). The top three world areas where the Peace Corps volunteers works are Africa (37%), Latin America (24%) and Eastern Europe/Central Asia (20%).

Education was identified as the largest area of need by those countries asking for Peace Corps assistance. Opportunities for education volunteers range from secondary English teaching, secondary math and science teaching to primary teaching training. All education positions require
at least a bachelor’s degree and a minimum GPA of 2.5, but different positions have different requirements. For example, the qualification for secondary math teaching is obtaining a bachelor degree in math, computer science, or engineering. Applicants with a degree in secondary education with a concentration in math or a degree in any discipline with certification in secondary math are also considered as qualified Peace Corps teachers.

The chance to make a real difference in other people’s lives is the main reason that most volunteers want to join the Peace Corps program. Other reasons, such as having the chance to learn a new language, living in another culture, and developing career and leadership skills are also reported by Peace Corps volunteers as a strong motivation for north-to-south movement. Rather than that, the Peace Corps experience, as the annual report shows, could benefit long-term career prospects, no matter whether they work for a corporation, a nonprofit organization, or a government agency. In other words, the benefits to Peace Corps volunteers will not end after their overseas service, but they will receive a variety of rewards for their dedicated service that will continue for the rest of their lifetime (Peace Corps, 2002).

For those who serve in the education area as K-12 teachers, the major benefits of joining the Peace Corps are professional and skills development. Fluency in foreign languages, international experience, and cross-cultural understanding are the major rewards that they gain when teaching abroad. From tangible benefits (i.e. student loan deferment, opportunities for job placements) to intangible benefits (i.e. making a difference in people’s lives) are always described by the returning volunteer teachers (Peace Corps, 2002). In some states, overseas teaching experience can also waive student teaching requirements or provide preliminary teaching credentials for returning Peace Corps volunteers.

Whether teachers are just out of college, in mid-career or even retired, the Peace Corps welcomes them and provides them with about three months of intensive training before their departures. This training and support will continually be provided throughout the teacher’s service. The new skills and knowledge that teachers learn from overseas teaching will help their
professional development, for both veteran and new teachers. For prospective teachers, it also provides advantages to enhance the opportunity to become more marketable to be hired by school districts.

The criticism of Peace Corps programs address the issue that agency too focus on increasing the number of volunteers, not the quality of volunteers. They just send the volunteers to the countries where they are most needed and failed without any resource and support. A better train volunteers and create stronger partnerships with local agencies is crucial to achieve their goals. Improving its technology to track volunteer projects as well as sharing their successful experience throughout the organization can also decrease the chance of failure. In other words, a top to bottom assessment as well as from bottom to top experience sharing is needed to find a better way to run this program.

IV. Case #4 Japan Exchange and Teaching (JET) program

_Historical, Social and Global Backgrounds_

Throughout Japanese modern history, Japan has strived toward internationalism by hiring thousands of foreigners to modernize Japan. These foreign advisors were hired by the Japanese government for their specialized knowledge to help the modernization of Japan mostly during the Meiji Era (1868-1912). According to historical documents, although the total number is uncertain, it is estimated that there were more than 3,000 people, both in the public and private sector, hired from abroad during that period.

The main goal of hiring the foreign advisors was to gain the transfer of knowledge and technology. Besides the value they provided in the modernization of Japan, the Japanese government did not intend to settle them permanently in Japan. The contracts were typically for three years duration. Once the Japanese had gained knowledge and technology from them and were qualified to replace them in their jobs, they were forced to leave without renewing their contracts. In fact, the foreign advisors were highly paid; for example, in 1874, there were 520 foreigners, and their salaries came to total ¥2.272 million, or 33.7% of the annual budget.
The activity of international recruitment was officially halted in 1899. However, similar employment of foreigners still exists in Japan, particularly in the field of the national education system and professional sports. Until 1899, more than 800 hired foreign experts continued to be employed by the government, and many others were employed by the private sector.

Japan Exchange and Teaching (JET) program, established in 1987, can be considered as the most extensive and active plan toward internationalization that Japan has ever had. By hiring thousands and thousands of college graduates from primarily English-speaking countries to assistant Japanese English teacher to teach in junior and senior high schools, Japanese government officials have begun to call the JET program the largest initiative since World War II in the field of human and culture exchange. The driving force behind the idea for the JET program includes three dimensions: 1) Geo-political crisis from foreign pressure 2) Perceived lack of global integration 3) continual reform of the English education.

*Geo-political crisis from outside pressure*

According to McConnell (1996), the initial idea of the JET program was in response to the geo-political crisis, the US-Japan trade crisis in the mid-1980s. The proposal of the JET program was presented by the Ministry of Foreign Affairs official, Mr. Ikuyo Sato, at the Reagan-Nakasone Summit. Hence, the JET program can be treated as a “gift” to the American side by using surplus yen to support this project. By setting up the JET program, the Japanese government may relieve the foreign criticism that Japan is a “closed” society. Following this, McConnell believed that the JET program should be categorized as a “reactive policy,” a driving force from outside pressure. Also, the JET program can be presented as a symbol of Japan’s “commonality” with other countries to show the determination for preparing for global leadership as well as an international state (McConnell, 1996).

*Perceived lack of global integration*

In the mid-1980s, while many countries were using mass schooling to create national identity and social and culture integration to deal with the conflict of different races, languages,
and religions, Japan seemed to have different story. McConnell categorized Japan as a country coinciding more with the boundaries defined by language, race, or ethnicity. Because the degree of population homogeneity is high in Japan, national integration is relatively easy to achieve. Hence, a country like Japan may face different problematic issues – global integration. As Japan’s emergence as a world economic power, historical isolation and population homogeneity may hinder global integration. As McConnell (1996) points out, the JET program can be seen as “a litmus test” by other nations to see whether or not Japan is willing to open its mind to embrace foreigners into their domestic institutions.

Continual reform of English education

Wade’s (2002) view is that the JET program is a continually developing projects of English education reform in the Japanese school system. Before the establishment of the JET program, the national Ministry of Education, Science, and Culture of Japan (called Mombusho) had been employing native speakers of English to assist both Japanese teachers of English and English education teaching consultants for prefectural and municipal boards of education. Two main projects were the “British English Teachers Scheme (BETS)” and the “Mombusho English Fellows (MEF)” program. This form of English Teaching Recruitment Program was started in 1978 and was exclusively for British university graduates. This program became known as the "British English Teachers Scheme (BETS)" program. American teaching assistants were later added under the "Mombusho English Fellows (MEF)" Program. In order to meet the increasing demand for native speakers of English in secondary schools, the Japanese government decided to expand and reorganize the MEF and the BETS programs as a single national project, called the Japanese Exchange and Teaching program. It was sponsored by the Ministry of Education, Science, and Culture, the Ministry of Internal Affairs, and the Ministry of Foreign Affairs. Hence, this new project, the Japan Exchange and Teaching program (JET), can be observed as the combination of the two previously existing programs.

According to Wade (2002), Mombusho Guidelines (Mombusho 1989a, 1989b) or course
of study, announced by the Ministry of Education in 1989, is one of the most important sets of principles in the Japanese education system. The Mombusho guidelines include national standards for elementary and secondary schools. It also regulates the content, teaching hours, subject areas as well as the standard number of required credits at both lower-level and upper-level secondary schools. For English as a foreign language, the concept of “communicate competence” has been introduced in the guidelines. It also urges Japanese teacher to put more emphasis on the development of students’ communicate competence in English. As a result, the Ministry of Education has supported relevant initiatives seen as key to improvement of English language teaching in Japanese schools. One of these measures is the recruitment of native speakers of English as assistants to Japanese teachers of English.

The idea behind the JET project is “to bring the second language community into the classroom” (Savignon, 2003, p. 200). It is difficult for Japan teachers to provide their students with opportunities to use English outside the classroom; therefore, it is necessary to bring “representatives of the second language community into the classroom so that students can try out their English in a communication situation and develop the strategies needed to interact with and learn from a native speakers” (p. 200).

Goals of JET

The purpose of the JET program is to increase mutual understanding between the people of Japan and the people of other nations. Through this program, they want to promote “internationalization” in the local communities by using the improvement of foreign language education and development of an international exchange at the community level.

In fact, the term “internationalization” or Kokusaika has become a ubiquitous catchword in Japan society from 1970s to 1990s. As Mannari & Befu (1983) point out in the 1980s, Kokusaika “is one of the most potent and significant words in the contemporary vocabulary of Japanese intellectuals, academicians, politicians and journalists” (p. 9). However, Befu (1983) states that internationalization should be treated as a popular term rather than a technical one and
it has never had a proper definition. As a result, the meaning of internationalization may somehow include different degrees of “Westernization,” “modernization” and “liberalization.” Although the usage of “internationalization” has been declined recently in the public sector, replacing it by terms such as “globalization” or “multicultural coexistence,” has been a prevalent term for roughly three decades (Oliver, 2009).

According to Oliver (2009), although this word first appeared in 1920s, it did was not used commonly in Japanese society until the late 1960s. By examining the newspaper article, going back to the 1950s and the mid-1960s, he argues that this term emerged frequently in media to catch Japanese attentions. In the late 1960s, this word was heavily used in government, economic and business circles. One of the most significant documents is called the Economic and Social Development Plan, published by the Economic Planning Agency (EPA) in 1967. This document made “internationalizations” a key focus throughout the plan. In this plan, EPA indicates that Japan should “complete internationalization” in order to achieve two main goals: trade liberalization and capital liberalization.

The discourse of internationalization from a government perspective means liberalization, focusing on national-economic concerns. As Goa (1997) states, economic liberalization had become an “irresistible trend” in the world’s major industrialized countries by the end of the 1950s. In order to connect with this trend, the Japanese government had to open its door to liberalization. Under the influence of the rising criticism and pressure from foreign countries, particularly the United Stated, Japan implemented trade liberalization without restrictions on imports in the 1960s. In 1964, Japan joined the Organization for Economic Cooperation and Development (OECD) and was devoted to an entire liberalization of trade and capital.

In addition, internationalization was also used to frame the education reform in the 1980s. The National Council on Educational Reform (NCER), established by the government in 1984, studied issues such as “coping with internationalization” and suggested that education must prepare the next generation of “Cosmopolitan Japanese.”
encompasses the ability to communicate in one or more foreign languages, a thorough knowledge of foreign countries and cultures, a capacity to appreciate cultural differences, as well as an “international consciousness.” Along with these goals, students should be encouraged to develop individual characters, creativity, independence, self-discipline and personal responsibility. As the NCER proposed, to accomplish these goals, the existing system of Japanese education should fundamentally change and the educational system should be free from the limit of bureaucracy centralization, standardization and credentialism (Lincicome, 1993).

Organization and Administration

The JET Program was started in 1987 by local authorities in cooperation with four departments of Japan’s government. It included the Ministry of Internal Affairs and Communications (MIC); the Ministry of Education, Culture, Sports, Science and Technology (MEXT); the Ministry of Foreign Affairs (MOFA); and the Council of Local Authorities for International Relations (CLAIR). The CLAIR is the main institutional actor to administer the JET program by using approximately an annual $300 million budget to run this program.

The roles and responsibilities of four departments of the Japanese government will be described in detail below. The main duty of the Ministry of Education, Culture, Sports, Science and Technology, called MEXT, is to take an approach to help ALTs by providing useful seminars and workshops in JET Program conferences. MEXT also provides school education training, and guidance to ALTs. MEXT also is charged to evaluate and construct the education curriculum, implement policies as well as set educational standards. These policies and standards directly affect ALTs teach. In addition, MEXT provides the opportunity to participate in an opinion exchange every other year during the ALT Opinion Exchange.

The role of The Ministry of Foreign Affairs (MOFA) is to recruit and select participants through overseas embassies and consulates. Through these overseas embassies and consulates, the Ministry of Foreign Affairs will hold information sessions for interested applicants, review applications, hold interviews and notify successful candidates. It will also provide important
information for new JET Program participants about how to adjust and accommodate to the life changes in Japan. MOFA also holds pre-departure orientations and Q&A sessions to help new participants fully prepare before they arrive in Japan. Moreover, when the JET Program participants return to their home countries, MOFA also works closely with the local JETAA (JET Alumni Association) to maintain the friendships and relationships made in Japan.

The Ministry of Internal Affairs and Communications (MIC) is involved with the JET Program in calculating financial resources and determining guidelines for each participating country. MIC also needs to contact the schools, local government offices and other organizations that employ JET Program participants. MIC also allocates local taxes to help cover a portion of the program expenses such as participants’ remuneration and travel expenses.

The Council of Local Authorities for International Relations (CLAIR) manages the JET Program in conjunction with the three ministries. CLAIR was established as a joint organization of prefectural and municipal governments in July 1988, to promote and provide support for an increasing interest in local level internationalization in Japan. CLAIR’s goal is to ensure that the JET Program runs smoothly and successfully for the local authorities (Contracting Organizations) as well as participants. The main role of CLAIR is to advise Host Prefectures and Designated Cities, Contracting Organizations and participants.

CLAIR publishes the Contracting Organization Manual and the Questions & Answers Manual for Contracting Organizations. In addition, CLAIR holds seminars for Contracting Organizations, Prefectural Advisors and other officers, providing training and advice about JET Program matters and how to deal with cross-cultural issues.

Below is the list of CLAIR’s main duties in the JET program: 1). Overseeing correspondence with the ministries involved with recruitment and selection of new JET Program participants. 2). Placement of participants in contracting organizations. 3). Conducting promotional activities regarding the JET Program. 4). Providing assistance and guidance to contracting organizations. 5). Coordinating of the re-contracting process between JET participants.
and contracting organizations. 6). Preparing and implementing orientations and conferences such as the Tokyo Orientation. 7). Providing support for ALT Prefectural Mid-Year Seminars. 8). Preparing training materials such as Japanese language course study CDs and textbooks and implementation of Japanese language training for participants. 9). Providing counseling, guidance and other assistance for participants (CLAIR, 2009).

In addition, the JET pamphlet published by the Council of Local Authorities for International Relations (CLAIR) and three Ministries, describes the placement and duties of each position in detail. Three types of positions, Assistant Language Teacher (ALT), Coordinator for International Relations (CIR) and Sports Exchange Advisor (SEA) are opened to participants from different countries. For instance, the assistant language teacher (ALT) will be placed in elementary, junior and senior high schools, Boards of Education, etc. and their duties include assistance in classes taught by Japanese foreign language teachers and assistance in the language training of Japanese teachers of foreign language. Each participant will sign a contract for agreement of remuneration, work hours, travel expenses and the length of stay. They also send General Information Handbooks to new participants in their home country before they depart. This handbook includes information about living in Japan, and many essays and articles that can help participants to make a smoother transition in Japan. Because this handbook is presented in English and Japanese, both participants and host institutions can use it as a useful tool to facilitate communication (Council of Local Authorities for International Relations, 2008).

Participants and Development

The number of participants has seen significant growth: from its original 848 participants from four countries (the United States, the United Kingdom, Australia, and New Zealand) in 1987 to 4,682 participants from 38 countries in 2008 (see figure 4.2). Totally, over 46,000 people from 55 different countries have participated in the program since its inception, making it the world's largest exchange teaching program. However, the total number of JET participants has decreased by an average of 330 people per year since 2004 (CLAIR, 2008).
Although the JET participants, called JETs, are quite diverse from a total of 55 different countries, the U.S. and Western countries are a dominate group of participants in this program. For example, as of July 1, 2006, 5,508 participants were employed in the program. Of that number, about half are from the United States (2808), with others from Canada (618), Britain (577), Australia (316), New Zealand (242), Ireland (95) and South Africa (94) as well as China (77) and Korea (59).

Below is a list of the basic requirements that an applicant must fulfill in order to join the JET Program: hold a Bachelor's degree (in any subject); be a citizen of the country where the recruitment and selection procedures take place; have excellent skills in the designated language (both written and spoken); have a keen interest in the country and culture of Japan; in principle, be under 40 years of age; not have lived in Japan for three or more years after 2000, nor be a former participant in the program since 1998.

The JET program also requires each participant to attend pre-departure and post-arrival
orientations as well as conferences, including mid-year conferences and returnee conferences, during their tenure. After a weeklong orientation in Tokyo, participants are placed with a local authority in Japan (the Contracting Organization), which is the employer. There are 47 prefectural governments and 12 city governments, as well as numerous individual city, town and village governments and some private schools designated as Contracting Organizations. Applicants can set up to three preferred locations, and can request urban, semi-rural or rural placements, however, they may be assigned anywhere in Japan, and placements may not match their requests.

Usually, JETs sign a one-year contract, which can be renewed up to four times, for a maximum of five years. Some contracting organizations offer the option of contracting for a total of five years, although some contracting organizations strictly prohibit contracting beyond three years. Often the application for a fourth year is a rigorous process, including an essay and interview in Japanese detailing why the participant feels they should be allowed to continue in their position. Before 2006, participants could only contract for up to three years, with the exception of a few positions. Participants receive 3,600,000 yen per year. In addition, JETs may receive housing subsidies, or other benefits including paid airfare to and from Japan, and city taxes paid by the Japanese government. Participants are generally forbidden to take paid work outside of their program duties.

Kensaku (2000) points out two crucial questions of the JET program: “Has JET really helped to internationalize Japan and the Japanese?” “Have the assistant language teachers really had an impact in renovating the way English is taught in Japanese junior and senior high schools?”

For internationalization, he believes this issue should be addressed at both the national and the local levels. The JET program has been successfully approved by the national government as a policy to implement. However, as Kensaku (2000) indicates that a top-down initiative model is not enough. Without the support and acknowledge by the local government as well as individuals, it may lead a resistance to change and cause enormous confusion and
misunderstanding between participants and officials of different levels. Although McConnell (2000) states that “internationalization takes on a very different meaning in a relation-based social order than those that are more rule-based,” internationalization, as Kensaku (2000) mentioned, begins to realized there are differences between peoples with different cultural background. And the process of internationalization is a two-way, mutual interaction, which can only be negotiated by the efforts to understand the differences.

A survey points out that the JET program enhances the cultural understanding of Japan. The internal 1995 JET program survey indicates that nearly 60% of 2172 respondents would absolutely recommend the JET program to a friend; another 35% said they probably would participate. Meanwhile, the renewal rate among participants has reached over 50% and less than two percent of foreign teachers leave before their contracts expire. The number shows that many foreign teachers and their Japanese hosts build and form of enduring friendships.

For English education, although McConnell notes that the effects of the JET program on English education are “gradual and mixed,” and it remains to be seen whether English education has really improved. Kensaku (2000) believes that the long-term effects are gradually appearing in the education field. Wade (2002) argues that there appears to be general agreement that native speakers of English have contributed to English education in Japanese schools in three ways: they increase learners’ positive attitude toward communicating with native speakers of English; they enhance the ability of Japanese teachers to speak English, and their confidence in that ability; and they bring with them into Japanese classrooms innovative language teaching techniques.

In general, the JET program is more likely like a gigantic laboratory that many thousands; both Japanese and foreign involved in this program have been observed. Although the results of this program still need to be seen, as Kensaku describes:

There is no doubt that it has had a significant influence on opening the eyes of the Japanese toward the international world, as well as in creating a whole new
Critics and Challenges

The general criticisms of the JET Program are summarized as follow: First of all, there is a lack of professional training from both participants and contacting organizations (COs). Many participants have no formal training and a number of participants are interested only in exploiting the financial and travel benefits rather than the teaching experience of the program. Because the selection of participants is weighted toward recent university graduates, COs may have to deal with problems of reliability, stability, maturity, and inexperience in the working world in general. At the same time, most Japanese co-workers of JETs have no formal training to know how to use their services. As a result, the exceptional treatment of foreign workers is a burden on the Japanese.

Also, a limit timeline is regulated in the contract. The same time limit, the three-year contract, applies to all JET participants regardless of job performance. And there are very few opportunities for advancement in the JET program. Also, because participants arrive in August, they cannot take part in the important meet-and-greet icebreaking at the start of the Japanese fiscal year. Moreover, each participant may be treated differently. There is a wide variation in fringe benefits such as rent and annual leave among different companies. Meanwhile, the participants have very little influence on their choice of placement. The COs has very little influence on the choice of participant. Finally, the JET program is used as just a diplomatic tool to convince foreign criticisms that Japan has “xenophobic” immigration policies.

V. Case #5 Visiting International Faculty (VIF) Program

Historical, Social and Global Backgrounds

The report, Importing Educators, from the American Federation of Teachers (AFT) concluded that the number of overseas-trained teachers being hired in the United States is increasing steadily but the federal data for studying this trend is not available for public analysis.
This report also indicated that for-profit recruiting agencies are playing critical roles; however, they are entirely unregulated. As a result, abuse of overseas-trained teachers has been occurring all the time. “Importing” international teachers, may mask the root causes of a growing teacher shortage in public school systems around the country. To respond to this emerging trend of hiring teachers from abroad, the AFT suggested developing, adopting and enforcing ethical standards of international teacher recruitment and providing access to government data for tracking and studying are pressing needs. In addition, international cooperation and considering how to regulate international teacher migration, becomes an essential issue to prevent any negative impact of teacher mobility in the sending countries (AFT, 2009).

In 2003, Randy Bandy reported to the National Education Association (NEA) regarding the issue of the trends in international teacher recruitment. The study shows that in 2002 an estimated 15,000 overseas-trained teachers worked in the United States on visas and that about 10,000 worked in public schools (NEA, 2003). After five years, there was nearly a 30% increase in the number of overseas-trained teachers working in United States, reaching an estimated 19,000 teachers, who are now working in the United States on temporary visas. The trajectory of the number of overseas-trained teachers working in the United States has steadily increased since 2002 based on the data of issued H1-B and J-1 visas, for those gaining eligibly to work in the United States (AFT, 2009). Figure 4.3 shows a total potential number of overseas-trained teachers working in the U.S. on H1-B and J-1 visas. We can see a steady increase in the number since 2002.
Generally speaking, there are two main ways that international teachers can obtain legal status for working in the United States. One is the H-1B work visa; the other is an exchange J-1 visa. The H-1B nonimmigrant visa is for employers who intentionally hire foreign workers with “a body of highly specialized knowledge” in a specialty occupation. The period of the H-1B visa is three years and it can be renewed once. The quota of new H-1B visas that can be issued is 65,000 per year; however, the institutions of higher education, nonprofit and government research institutions, as well as institutions related to them have an exemption to the quota. The employers must first file a Labor Condition Application (LCA) with the Department of Labor through an online system to hire an H-1B worker.

In 2007, the total number of Labor Condition Applications for pre-K, primary and secondary teachers submitted by schools was 20,724, compared with 15,324 applications in 2005.
According to the data from the Foreign Labor Certification Data Center, the top five states submitting Labor Condition Applications for teachers in 2007 was Texas (4,556), Georgia (4,434), New York (2,195), Maryland (2,012) and California (2,008). The LCA application number can be treated as an important indicator of intent and interest by schools or school districts to hire overseas-trained teachers (see figure 4.5). However, not every application will be approved by the LCA. In the same year, the total number of H-1B visas issued for elementary and secondary school teachers was 6,085, according to the report released by the U.S. Citizen and Immigration Service, an estimated one third of the approval rate.

**Figure 4.4: Number of Labor Condition Applications Filed for Pre-K, Primary and Secondary Teachers in the U.S.**

![Bar chart showing the number of labor condition applications filed for pre-K, primary, and secondary teachers in the U.S. for the years 2005, 2006, and 2007. The data is sourced from the Foreign Labor Data Certification Center.]
The second channel for legally hiring foreign teachers into the United States is by using the J-1 visa. The J-1 visa is a nonimmigrant visa for the exchange visitors’ program of the U.S. Department of State. Teachers in one of fifteen categories are allowed as exchange visitors to come to the United States. The main goal of the J-1 visa is to facilitate cultural exchange. Incoming teachers bring their home cultures to expose American students, and also learn and take back American culture to their hometown. The J-1 visa is a one-year visa and is renewable twice for a total of three years. After three years, J-1 teachers must leave and reside in their home country for two years.

Overseas-trained teachers cannot apply for J-1 visas individually, but must do so through a Department of States designed sponsor. These sponsors include federal, state and local government agencies, academic institutions and cultural organizations. Currently, there are 64
designated teacher sponsors in the United States, including 23 in the State Departments of Education, 27 in schools or districts, 7 serving as recruiters and 10 in other institutions. For non-government sponsors, the eligibility is dependent on the agency’s ability to comply with program regulations as well as to meet the financial obligations. The number of J-1 teachers is reported by the Interagency Working Group on U.S. Government-sponsored International Exchange and Training every year. In 2007, for example, 2,456 primary and secondary teachers worked in the United States through J-1 visas.

The driving force for bringing internationals to teach in local school districts is mainly the result of teacher shortages in hard to staff inner-cities or very rural schools and in hard to staff disciplines, such as math, science, and special education. An estimated 200,000 new teachers need to be hired each year and 70,000 of them need to be placed into high-poverty urban areas. This phenomenon of difficulty to staff teachers does not exist only in some specific states, but nearly all states according to the report from the U.S. Department of Education’s 2007 Teacher Shortage Areas Nationwide Listing. California, for example, estimates a shortage of 100,000 teachers over the next decade. No matter what reasons cause this growing teacher shortage across the country, either high teacher dropout rates or shortage in the labor pool, the reality is the local schools need teachers to teach students for their day-to-day learning.

Because of the decentralization of the education system in the U.S., the issue of teacher shortage is mostly addressed at the local level. However, unwilling or unable to deal with reasons for the growing teacher loss, such as improving teacher working conditions, local governments are providing “quick-fix” solutions by hiring overseas-trained teachers to solve this problem. With the assistance of international teachers, local administrators can immediately relieve the increasing concerns and pressures on them.

Because of the demand of the immediate need for teachers, the recruiters of overseas-trained teachers have been burgeoned and this has become a new industry over the past decade. There are an estimated 33 international teacher recruitment agencies working with U.S. schools.
The recruitment institution works as a catalyst to accelerate the teacher migration trend by magnifying “pull factors,” and attractive factors to select another place to live or work. These factors include higher compensation and better living conditions. In addition, to intensify these pull factors, they also ignore or mislead potential challenges of teaching as well as the risks of living in these locations. For example, recruitment agencies may only claim the comparatively high salaries they can earn in the United States, but they provide no information about income tax rates or relatively high costs of living. Because of their financial interest, these profit-driven institutions do their best to attempt to persuade teachers from all over the world to relocate to a country full of “milk and honey” like the United States.

Rather than persuading teachers using the attractions of working in the United States, they also actively convince school systems to believe the benefits of hiring overseas-trained teacher by advertisements in the media. After paying a small amount of money to recruiting agents and receiving a password from them, interested schools are able to view the resumes, video interviews of candidates online and then decide which teachers they want to hire. Most of the recruitment agencies make a profit from either the schools or teachers; this compensation ranges from $3,000 to $13,000 for each teacher. This exchange fee includes the cost of prescreening for qualifications, scheduling interviews, securing visas, arranging flights and housing, as well as the orientation when they arrive. The operation of these firms may be illustrated by exploring the recruitment agent, Visiting International Faculty (AFT, 2009).

Goals of VIF

Visiting International Faculty (VIF), founded in 1987, is the largest recruiter that brings teachers to the United Stated on J-1 visas. It was founded by Dr. Fred Young, the President Emeritus of Elon University and a lifelong advocate of international cultural exchange. The object of VIF is to bring global teachers into the classroom. It not only helps K-12 schools build the 21st-century skills necessary to succeed in the global marketplace, but also provides meaningful international education opportunities for the generations of students at home. With
this ideology of benefits of a culture exchange, they believe that all schools should have at least one international teacher and students should be accompanied by international teachers throughout their academic careers. Commences, as well, should have equal opportunity to develop global citizens for success in the global marketplace (VIF, 2009).

David Young, a VIF chief executive officer, defines the mission of the VIF this way:

We believe that international experience and cultural exchange are an essential part of education today. Students need to be exposed to other cultures at an early age, and teachers must be able to present a global perspective to students. Hosting or serving as an international teacher accomplishes both of these goals and is more important now than ever (Visiting International Faculty Program, 2009).

VIF began hiring K-12 teachers in 1989 in cooperation with the North Carolina Department of Public Instruction. Only 12 international teachers worked in 10 North Carolina counties as language teachers for the first year. In 1996, the Visiting International Faculty (VIF) was asked by the N.C. Department of Public Instruction to provide teachers in other subject areas. Since its founding, VIF has placed about 8,500 international teachers in more than 1,500 schools in states including North Carolina, South Carolina, Georgia, Virginia, Florida, Colorado, Maryland, and California. Each year, around 1,600 overseas-trained teachers come into the United States through VIF from more than 70 countries, including Argentina, Australia, Canada, Chile, Colombia, Costa Rica, Denmark, Ecuador, Jamaica, as well as Mexico (VIF, 2009).

Mostly, school districts have to pay VIF for this service of hiring teachers from abroad. This is compared with different recruitment institutions that receive payments from teachers. In the VIF model, school districts generally pay about $12,500 per teacher. Although school districts are the main resource of paying the money, the employers of VIF teachers vary district by district.
In some cases, VIF teachers sign contracts with school districts as most domestic teachers do, but most of the time they are employed by VIF. As a result, VIF has the right to end a teacher’s visa anytime as well as cease their employment relationship.

**Impacts on Teachers, Schools and Communities**

The process of recruitment for VIF teachers is highly selective. The selection process includes a detailed application with essays, verification of credentials and experience, criminal-background checks as well as personal face-to-face interviews. Only seven percent of applicants can be VIF teachers in U.S. schools. In addition to these selecting standards, some basic criteria, such as proficiency in English, holding a university degree as well as having teacher training and experience are also required. This strict screen process ensures that applicants meet the high standards of becoming teaching candidates in the United States. As a result, VIF teachers have more than a 90% success rate. More than 80% of VIF teachers receive "outstanding/superior" or "above average" ratings from school districts (VIF, 2009).

Ynez Olshausen, a principal in Smith Academy of International Languages in Charlotte, N.C., states how successful VIF teachers are in her school.

The impact of exchange programs on the school climate is tremendous. The personal relationships forged between colleagues or students can enhance knowledge about the world and provide motivation to learn with and not just about people from other countries and cultures. For staff and students alike, VIF teachers serve as models of openness to new experiences and confidence in meeting the challenge of working in a new culture. We must encourage our U.S. teachers and students to follow their example (VIF, 2009).

The positive impacts of having VIF teachers may occur in different layers. For students
in the U.S., international teachers provide them with a chance for cultural enrichment since many of them have not had contact with a different culture. For the schools, highly qualified VIF teachers from around the world help build a diverse workforce. They can share different educational practices and teaching methods, and provide international experience to their school colleagues. For international diplomacy, VIF teachers serve as cultural ambassadors to students, introduce the correct image about their home countries, and create positive relationships and experiences. Once VIF teachers return home; they also serve as goodwill ambassadors on behalf of the United States.

Although overseas-trained teachers bring certain influences to students, schools, as well as the whole community, some problems have emerged from recruiting overseas-trained teachers. These alarming issues, according to the AFT report, include unequal benefits and treatment of migrating teachers, culture shocks, and communication barriers.

For the unequal benefits and treatment, most contracts that foreign teachers sign do not provide for dental insurance coverage. In addition, the employer has the right to nullify their stipulations for any reason. As a result, whether or not these overseas-trained teachers can stay in the country is dependent on the goodwill of the employer. The contract that VIF teacher sign, for example, acknowledges and agrees that VIF has authority to “unilaterally terminate the teacher’s participation in the program” based on anything “contrary to the program’s objectives, rules and regulations.” This means that the recruiter has a right to fire the teachers. Any grievance or complaint from the overseas-trained teachers would not be allowed under such conditions.

Regarding culture shock, in America, parents frequently challenge a teacher’s authority and the relationship between teacher and student is relatively equal. Overseas-trained teachers also face several challenges including unfamiliar structural and organizational arrangements as well as different assessment systems. Under these new conditions, foreign teachers require significant adjustments to their expectations and behavior. However, the type of orientation and the quality of support systems that overseas-trained teachers receive from recruitment agencies
and schools varies widely in the United States. Teachers who join a large pool of same nationality people may have a relatively strong support network compared with those who do not. It is true that helping new domestic teachers through their first years can prevent their dropout from the teaching professions, but this is truer for foreign teachers. Hence, high-quality orientation and effective mentoring are essential for international teachers to overcome the challenge of cross-culture teaching as well as ease their transitions in the unfamiliar ways of the American culture.

Regarding the challenge of communication barriers, students and parents of overseas-trained teachers have raised the concern of communication, especially teachers’ accents. Although the English proficiency of international teachers is a basic standard for hiring, it may sometimes be misjudged or be an inadequate assessment by employers before the hiring. It is also difficult to prevent teachers’ accents especially since most of them are from diverse regions and ethnicities. Unfamiliar accents may confuse and distract students, leading to an impediment in the students’ learning. Moreover, international teachers with unfamiliar accents may be deemed as performing poorly in their teaching. To overcome the challenge of this communication barrier, assistance should be provided to smooth the struggling experienced by students in dealing with this communication issue.

*Brain Drains or Gains*

In addition to highlighting the issues of overseas-trained teachers relating to the individuals, there are issues on the school levels; these concerns impacting the sending countries has been currently increasing. One of the main concerns is international teacher recruitment practices may worsen the negative brain drain effect, namely reducing the human capital in the sending countries. For example, in 2005, there were 108 Filipino teachers hired by Baltimore City Schools to staff schools labeled as “persistently dangerous” by the state of Maryland. In 2009, after four years, the number dramatically changed; more than 600 teachers from the Philippines are now teaching in Baltimore. Other counties in Maryland have adopted similar practices of hiring teachers from the Philippines; estimating 1200 Filipino experienced teachers were working
in Maryland in 2009 (Neufeld, 2005; 2008).

Unfortunately, the Philippines has never been a nation state with a surplus of teachers to export. On the contrary, it currently has an estimated shortage of 16,000 public teachers and has the worst pupil-teacher ratio at 45:1 in Asia. The first class usually starts as early as 6:00 a.m. so that schools can schedule two, three or four shifts each day. In many schools, it is not surprising that teachers have to teach a class packed with 70 to 80 students to respond to this problem. Such working conditions, as well as their earning an insufficient salary to raise their families, drive many teachers to migrate for a better life with included benefits such as good medical care for their family and opportunities of a college education for their children (Mydans, 2003).

The impact of teacher migration in the Philippines, as the report from the Philippine Overseas Employment Agency pointed out, is that they are losing their experienced teachers in specific fields. They treat teachers as precious human capital for the next generations. Once these high quality teachers choose to leave, it is difficult to replace them. The report was summarized as follows:

In Philippine education, brain drain is said to be evident in both the public and the private school system, though [it is] more felt in the former. The fields most vulnerable are special education and elementary and secondary science and mathematics education. Those leaving teaching jobs abroad are generally [equipped] with better credentials. Finding suitable replacement[s] for them is not easy.

As we all know, the Philippines has a labor exporting economy. Exporting labor is the top dollar earning industry. One in seven Filipino workers works abroad and sends more than one billion dollars a month back to the Philippines; as a result, the government has developed a large bureaucracy to assist citizens in securing foreign employment. Under the social situation with a 13.9% unemployment rate and with 40% of the people living below the poverty level earning less
than $1 per day, not only the Philippine government encourages their workers to stay abroad to find a job, but also workers themselves think that migration may be the only way to build a better life for themselves (Manalansan, 2003). For example, a “home” teaching teacher earns $3,500 a year; this can be compared to as much as $45,000 a year if they teach in the United States. They can then send back much of this money to the Philippines to support their families.

A report from AFT points out an interesting and important question of whether or not hiring overseas-trained teachers into United Stated will follow the pattern of importing nurses from abroad and the impacts of nurse migration in sending countries. Because the trend of importing nurses has existed for more than 50 years, the data is well collected and regulations are also well established, it may be an important model for further study to understand the phenomena of hiring foreign teachers (AFT, 2009).

The trend of importing nurses to solve the demand in the nurse workforce has drastically increased in the last two decades. In the 1990s, only four percent of nurses were from abroad. In 2002, one third of new nurses were hired from other countries. By 2004, 14% of all nurses in the United Stated were foreign born. After importing nurses from aboard for over 50 years, some facts show the impacts of nurse migration in sending countries. For example, the United Stated has 94 nurses per 1,000 people compared to 61 in the Philippines, 13 in India and 12 in Kenya. Two hundred hospitals in the Philippines have closed within the past two years and 800 hospitals have partially closed because of the lack of health care workers. In Malawi, 60% of the nursing workforce left hospitals between 1999 and 2001. By 2000, five hundred nurses left Ghana; the number looks small but it is twice the number of new nurses graduating from nursing education programs (Kingma, 2006; WTO, 2007). All phenomena that I described above represent the fact that importing nurses has a significant impact on the healthcare system in sending countries, especially from small nation states.

Public Service International (PSI) may be the most active organization that campaigns on the issue of migration and Women Health Workers regarding the mass migration of nurses from
the developing world. PSI has developed a prominent program for studying the impact of migration trends. The mission of PSI is to advocate systemic protection and reforms by extending legislation and government policies to eliminate “exploitative and discriminatory recruitment and employment practices in the healthcare sector.” They strongly recommend the public sector union should engage in action to protect every single health care worker. So far, many results have been achieved from the efforts of PSI. For example, unions have supported ethical recruitment guidelines and are lobbying the government to adopt this proposal. Unions also have agreed to establish migrant health workers’ networks and to promote equality at work. In addition, unions have endorsed the policies for compensation to the Ministry of Health or other governments in sending countries for the training and investment they have provided. Although the numbers migrating in the education sector are not yet as great as in the health care field, there is growing concern about the similar negative brain effect. So these objectives that PSI has formed may be highly relevant to the education sector and provide a direction and outline for stakeholders in the education community to deal with the issue of overseas-trained teacher recruitments (PSI, 2006).

In fact, the United States is not the only country solving its own shortage by recruiting international teachers. It has become a worldwide phenomenon and globally there is a concern of its far-reaching impacts. In 2004, 53 countries of the Commonwealth have signed the Teacher Recruitment Protocol. The main purpose of this protocol is to protect the rights of teachers, the integrity of national education systems, as well as to prevent the exploitation of the scarce human resource from poor countries (Commonwealth, 2005). By identifying the rights and responsibilities from both sending and recruiting countries, this document develops and serves as an excellent model for regulating the process of international teacher recruitment. Although the United States is not a member of the Commonwealth, the principles outlined in this protocol should be highly valued and considered to meet the standards of ethnical international teacher recruitment.

VI. Case# 6 The Commonwealth Teacher Recruitment Protocol
The Commonwealth Teacher Recruitment Protocol has been adopted by Commonwealth member states since 2004. The protocol aims to “protect the integrity of national education systems and prevent the exploitation of [the] scarce human resource of poor countries,” and seeks to safeguard the rights of international teachers and their working conditions in the recruiting countries. This leading agreement on the regulation of recruiting foreign teachers is a best practice in migration and development and should be used as a good practice beyond the Commonwealth. In order to better understand the phenomenon of transnational teacher mobility, it is important to review the background, the purpose, implementation, as well as the challenge of the Protocol in detail.

Historical, Social and Global Backgrounds

The increasing teacher demand worldwide

The increasing demand for the teaching profession is widely acknowledged not only in developing countries but also in industrialized nations. According to the report from UNESCO, there are about 65 million teachers in the world but it estimates that 18 million new teachers are needed by 2015 for to ensure universal access to primary education for students in all countries in the world. Similarly, a report from Global Campaign for Education (GCE) calculates that over 100 million children have been currently denied their right to a primary level education. There need to be 14 to 22.5 million teachers recruited if they want to reach a 40-pupil ratio for those children. Also, the president of Commonwealth Learning advised that Africa would need an additional five million teachers to achieve University Primary Education.

In the United States, according to Nation Education Association (NEA), around 20% of teachers give up teaching after three years and 50% drop out after five years, although there is actually a surplus of trained teachers. There still needed to be about 2.4 million teachers hired by 2009 (NEA,). A report from the American Federation of Teachers (AFT) also estimates that about 200,000 new teachers need to be hired each year, and about 70,000 new teachers need to be hired into high-poverty areas (AFT, 2009). In the United Kingdom, some schools are losing 40% of
their teachers every year. Canada and Australia will face similar teacher shortages in the next five years because of the aging demographic and early retirement of teachers as well as high teacher attrition rates in the “hard-to-staff” inner city or very rural schools (Ochs, 2007).

Increasing pressure of right-based ideology: improving teaching and learning for everyone

Rather than just look at the dimension that there are not enough teachers, it is also important to address the context of global movement to right-based ideology: all children should have access to education of good quality. According to Edward & Spree (2007), the phenomenon of transnational teacher mobility is not simply a movement of labor between North and South driven by teacher shortages or economic factors. They illustrate that international support for improving teacher quality and the profession is a human rights and social justice issue for both teachers and students. It has become natural that all students desire quality education to learn and share the same set of basic skills and knowledge, regardless of national boundaries and ethnicities. This universal right-based ideology has been represented by the commitment of The Dakar Framework for Action, Education for All (EFA) as well as the fulfillment of the United Nation’s Millennium Development Goals (MDGs). The former, EFA committed in 2000, to focus on equity and the elimination of gender disparity in education; the later, MDGs signed in September 2000, addresses goals of reducing extreme poverty, children mortality rates, as well as the achievement of universal primary education and promoting gender equality.

It is true that the increased need for sufficient and qualified teachers in developed countries can achieve those goals, but this is particularly true in developing nation states. However, embedding this assumption of universal right-based education, does create relatively more pressure on the developing world as there is increased demand for free primary and secondary education, particularly in the field of teacher supply and development. Because of the struggle with finding sufficient resources or poor policy planning for teaching and learning, the goals of EFA and MDGs have placed greater burdens on developing countries. The governments
of small and developing countries, as a result, recognized that qualified and competent teacher continuity loss is a result of international recruitment to industrialized countries, career change with disaffection as well as attrition related to HIV & AIDS. They also noted that for these reasons, the goals of MDGs and EFA would not be achieved before 2015.

* A growing practice of international teacher recruitment *

According to McNamara et al. (2007), there are five additional factors to make the phenomenon of international teacher recruitment more possible around the world. First, teaching is becoming a more global profession. Teachers can serve in the global market with the growth of the international school movement. Second, schools in countries like the UK, are becoming more cosmopolitan, especially in the urban areas, and becoming more multicultural. Third, the growth in the use of Internet has facilitated the communication and low-cost fee for global travel, which also allows teachers to move more easily. Fourth, the remittance payment system for foreign exchange is an important factor to urge global teacher movement. Finally, the continued negotiation on the General Agreement on Trade in Service (GATS), the first multilateral agreement to provide legally rights to trade in all services, including naturalized persons (i.e. auditors and teachers) also stimulates transnational mobility in the global teacher labor force. All the above factors can be treated as sufficient conditions to facilitate global teacher movement, but again the peaks in teacher shortage around the world are the main driving force to produce the practice of transnational teacher recruitment.

In order to deal with the supply deficits, more and more industrialized countries start to employ teachers from developing countries as a quick-fix strategy. This active recruitment may be one of the main causes for opening the global teacher labor market. Considering all conditions together, we can observer a growing phenomenon of worldwide teacher mobility. The following section will discuss an increasing practice of international teacher recruitment in the United Kingdom, including why UK schools recruit overseas trained teachers, and how they undertake that recruitment as well as whom they recruit.
The impacts on teacher supply and demand in the United Kingdom relate to factors such as birth rate, teacher age profile, teacher morale, perceptions of job security, and the economic cycle (National Foundation for Educational Research, 2001). Although in an estimated population decline and in the period of oversupply of teachers, the United Kingdom is still in the period of teacher shortage mainly because of the aging and high teacher turnover rate. The demographic data shows that the teacher workforce in the UK is about 23% of primary, 27% of secondary, and 40% of special school teachers are over the age of 50. They are likely to retire within the next 10 years. Regarding the teacher turnover, the UK is suffering from, on average, 32% of the teaching staff leaving. In the Greater London area, for example, it even reaches about 40% in the area of teacher change. A recent report presents this staffing problem and indicates about 40% of women in the 25-34 age range are likely/very likely to leave their teaching in the next five years (Hutchings et al., 2006). Together with population change, teacher supply, aging and attrition, the UK has difficulty to use its internal market capacity to meet the new demands of teaching.

The acute teacher shortage in the UK has been given rising attention since 2000. A study examines the reasons that lead teacher shortages were revealed in the late 1990s. It concluded that unadjusted salary scales and poor working conditions are the main reasons that teaching cannot compete in the open job market (Robinson and Smithers, 1998). A report commissioned by the National Union of Teachers (NUT) was published in 2000. It pointed out that about half of vacant teaching jobs were difficult to fill and around 25% of those were indicated as very difficult to fill. Although the shortage varied based on the subjects and demographical locations, mathematics, sciences, and technology are the fields that mostly reported difficulty in hiring in the very rural areas or urban cities like London.

An emergency meeting was to be held in Whitehall in December 2000. The goal of this meeting was to deal with the phenomenon of sending pupils home because of the severe teacher shortage that occurred during the wintertime in Britain’s classrooms. They concluded in the proposal for this crisis, including a reduced school day, such as four days a week, “fast-track”
recruitment, attracting teachers from abroad to fill the vacancies, as well as bringing back those teacher who dropped out of their profession. At this point, the issue of recruiting overseas-trained teachers (OTTs) was put on the table and treated as a package that could provide a “quick-fix” to the crisis of teacher recruitment in the UK schools.

The majority of oversea-trained teachers in the UK are recruited through recruitment agencies although some of them have also been recruited by Local Education Authorities (LEA) or by individual schools. About 300 private agencies are actively involved in oversea trained teacher recruitment and making the UK becomes the main recruiting country of the Commonwealth countries. In 2000, approximately 10,000 oversea-trained teachers were recruited to teach in the UK originated from five main nationalities, South Africa, Australia, New Zealanders, Jamaicans and Canadians. A Commonwealth report indicates that the profile of migrating teachers in the Commonwealth are that they are mostly male, with ten or more years of experience and they are usually highly qualified for teaching particular subjects, such as math and science (Commonwealth Secretariat, 2005).

Growing practices of international recruiting for teaching jobs also occurs in the United States. According the report from AFT, the number of overseas-trained teachers being hired in the United Stated is increasing steadily. Although there are no essential federal data for overseas-trained teachers, an estimated 19,000 teachers were working on temporary visas in the US in 2007. Most of them are being placed primarily in inner-cities or very rural schools teaching the “hard-to fill” disciplines of math, science and special education. For example, in 2005, Baltimore Public Schools hired 108 teachers from the Philippines to help with the staffing shortage. Four years later, more than 600 Filipino teachers were working in Baltimore, contributing to about 10% of the teaching force. Other counties other than Baltimore in Maryland have also used similar hiring practices and estimated more than 1200 Filipino teachers worked statewide in 2009.

Private agencies play a crucial role to accelerate teacher mobility through international recruitment. There are an estimated 33 international recruiters working with U.S. schools and
local districts, as well as state authorities. For example, the Visiting International Faculty Program (VIF), the largest international teacher recruitment agency in the United States, may be a good example of how for-profit agencies are involved with and facilitate trans-national teacher mobility. The VIF program was founded in 1987. It began by hiring 10 foreign language teachers in 1989, through cooperation with the North Carolina Department of Public Instruction. In 1996, the North Carolina Department of Public Instruction asked the VIF to provide teachers in other subject areas. Since 1989, this program has provided more than 7,000 teachers with positions and served more than 1,500 schools in over 200 school districts in the United States, including North Carolina, South Carolina, Georgia, Virginia, Florida, and California. Teachers in the VIF program are very diverse. International teachers come from more than 50 nations and can be classified by different subject specialties and regions (Visiting International Faculty Program, 2009).

Commonwealth response to international recruitment of teacher concerning the drain on the Commonwealth’s resources, this issue of international teacher recruiting became a main topic in the Commonwealth annual meeting in 2002. The Commonwealth, a non-profit transnational institution, is an association of 53 independent states, including the United Kingdom, Australia, India, Kenya, and Jamaica. The mission of The Commonwealth is to consult and coordinate the common interests of their peoples and also to promote international understanding. This transnational institution often provides an environment for member governments and countries in different stages of development and opposing interests to reach a certain level of agreement (The Commonwealth, 2009).

Increase worries of international teacher recruitments

The Protocol on Teacher Recruitment was initiated at a meeting, organized by the Commonwealth Secretariat, at the Hotel Savannah Barbados in July 2002. The Caribbean ministers of education raised a concern of negative impacts of organized teacher recruitment on small island states and searched for Commonwealth assistance. For example, Jamaica’s Education Minister Henry-Wilson called upon the UK authority and Commonwealth Secretariat
to be engaged in wide scale debates on teacher training, migration and responsible recruitment to
the benefit of both source and receiving countries. Four key issues during this meeting were
discussed including: 1. a call for a managed and ethical process of recruitment; 2. the need to
understand the impact of teacher recruitment; 3. the importance of developing strategies so that
vulnerable states could retain teachers; 4. the demand for recruiting countries to pay
compensation to the source countries. The outcome of this meeting was the Savannah Accord, a
document that contained a specific proposal for future actions including research on teacher loss,
sharing of the information of teacher recruitment as well as drafting a protocol for recruitment of
teachers in Commonwealth countries (Commonwealth Secretariat, 2003; Morgan et al., 2005).

The draft of protocol focuses on two main areas: “a development assistance program by
recruiting countries to compensate for loss of human capacity” and “regulatory guidelines and
controls for recruiters.” The draft of protocol was presented to Ministers of Education who met in
the Seychelles in March 2003. It was agreed that the protocol should create some amendments
and move forward to a meeting of the ministry of education in Lesotho in 2004 (Morgan et al.,
2005).

Through the long process of intensive discussion, drafting and redrafting, all ministers
present at the meeting (a total of 23 Commonwealth Ministers of Education including Jamaica,
South Africa, Kenya, and the United Kingdom) signed the Commonwealth Teacher Recruitment
Protocol in September of 2004. The protocol aims to protect the integrity of national education
systems and prevent the exploitation of scarce human resources of poor countries. This protocol
also seeks to safeguard the rights of international teachers and their working conditions in the
recruiting countries. By doing so, this protocol clearly outlined the rights and responsibilities of
recruiting and sourcing countries as well as recruited teachers. More detail about this protocol
will be discussed later. As Morgan (2005) pointed out, it is a major success for Education Section
of Commonwealth Secretariat because it is a leading agreement on regulations for recruiting
foreign teachers and also a milestone to reach an agreement within Commonwealth countries.
especially, facing the member governments that have opposing interests.

The protocol consists of three main sections. The first section outlines the goals and ambitions of the protocol. The second section addresses the rights and responsibilities of three groups: recruiting countries, source countries, and recruited teachers. And the final section discusses monitoring, evaluation, and future actions regarding the issue of international teacher recruitment.

**Goals and Ambitions**

Concerned about the harmful impact of transnational teacher recruitment, 23 ministers of education of Commonwealth member states signed the Commonwealth Teacher Recruitment Protocol at Lincolnshire, United Kingdom, in September 2004. This international framework aims not only to protect the right of teachers to migrate internationally but also to ensure adequate investments by governments and the international community to have quality education. The Protocol: 1). aims to balance the rights of teachers to migrate internationally, on a temporary or permanent basis, against the need to protect the integrity of national education systems, and to prevent the exploitation of the scarce human resources of poor countries. 2). seeks to safeguard the rights of recruited teachers and conditions relating to their service in the recruiting country. 3). seeks to promote the positive benefits which international teacher migration can bring and to facilitate the sharing of the common wealth of human resources that reside within the Commonwealth (pp. 7-8, Commonwealth Secretariat, 2004)

**Rights and Responsibilities**

The second section starts with a clear definition of three groups: recruiting countries, source countries and recruited teachers who frequently appear in this protocol. The recruiting country is defined as the country that is seeking to recruit, or succeeds in recruiting, teachers from other countries. The source country in this protocol means the country from which teachers are recruited for service abroad. And the recruited teacher is described as a teacher who is recruited for service in a country other than his/her own (Commonwealth Secretariat, 2004).
The recruiting countries have the right to recruit teachers from any country but this requires several responsibilities. The responsibilities of recruiting countries include managing domestic teacher supply and demand and obtaining the rights of recruited teachers. It also suggests, an “acceptable recruiting process” should be maintained for recruiting countries, i.e. recruiting countries shall make efforts to avoid recruiting teachers during the course of the academic year and should provide all relevant information regarding the status of the recruited teacher. It outlines that recruiting countries should provide similar or no less (poorer) working conditions than their previous status. Recruiting countries should make their effort to obtain a clearance certification before an employment contract is signed and provide adequate orientation programs focusing on the new school and environment (Commonwealth Secretariat, 2004).

Further, this protocol calls for very specific actions for the regulation of private agency in recruiting countries. For example, recruiting agencies should contact the intended source country in advance and notify them of their intentions. They also have an obligation to reach a prior agreement with the government of the source county about the numbers, the means of recruitment and should have to obey the labor laws in the source countries. Moreover, private agencies have the responsibility to inform recruited teachers of the names and contact details of all teacher unions in recruiting countries (Ochs, K., & Commonwealth Secretariat, 2005).

The responsibility of source countries includes managing teacher supply and demand within the country as well as mobility and loss in the circumstance of originated recruitment. They have to develop effective strategies to attract potential teachers, recruit and retain qualified teachers. They also have to set out clear guidelines to tell the recruiting agency what categories of teacher they will not support for international recruitment. Any country has the right to be informed of international teacher recruitment by recruiting countries. Bi-national discussions should be held in order to endeavor to reach agreement on recruitment. If an agreement cannot be reached, source countries have the right to decide whether or not they accept the teacher recruitment from abroad (Ochs, K., & Commonwealth Secretariat, 2005 & Commonwealth
Secretariat, 2004).

The group of recruited teachers should have the following expectations when they go to teach in another country. According to the protocol, they should enjoy employment conditions not less than nationals in job positions and deserve a fair recruitment process without discrimination, dishonesty or misleading information. They should receive an orientation and induction to their new school and environment. In addition, recruited teachers should expect to benefit from professional opportunities and experience and to be assisted to improve their professional development and achieve their qualified status. Finally, it is suggested that teachers sign contracts directly with a government, educational authority or school even if they use private agencies to find teaching positions (Commonwealth Secretariat, 2004).

Monitoring, Evaluation and Global Cooperation

The final sections of the protocol discuss monitoring, evaluation, and future action. In the monitoring and evaluation part, the institution of Commonwealth Secretariat has to take main responsibility to monitor the status of international teacher recruitment by providing the number, recruitment practices and effects, particularly the impact on developing countries within the Commonwealth. This institution also needs to assess the application of the protocol and report to the Conferences of Commonwealth of Education Ministers, which are held every three years. Commonwealth Education Ministers have to undertake a regular review regarding the operation of protocol to inform stakeholders, teachers’ unions, as well as recruiting businesses across the Commonwealth (Commonwealth Secretariat, 2004).

In the conclusion part for future action, it is recommended to establish a working group to identify how teachers can have greater access to teaching across the Commonwealth as a continuing professional development activity. The protocol also requests the secretariat to set up a working group to systematically assess the status of teacher qualifications and professional registration status across Commonwealth nations. It suggests that a comprehensive study of teacher mobility should be undertaken in order to fully understand the scale of transnational
teacher flow within the Commonwealth. The last action of the protocol calls for working in collaboration with several international organizations, such as The International Labor Organization (ILO) and UNESCO, to promote this protocol as “an international standard of best practice in organized teacher recruitment” (Commonwealth Secretariat, 2004, p.18).

Implementation of the Protocol

In order to monitor the teacher recruitment agency for ethical recruiting, the Department for Education and Skills (DfES) in the United Kingdom accepted the “Quality Mark” introduced by the Commonwealth education ministers in 2002. This Quality Mark established minimum standards of international recruitment processes for private agencies to protect both the rights of overseas-trained teachers and the integrity of the education system in the source country. In 2004, the Government Office for London and the Association of London Chief Education Officers created a “preferred supplier list” (PSL) to raise the standard of recruiters and oversee their operations in London. This PSL composed of all teacher recruitment agencies was awarded with the Quality Mark. In order to uphold this Quality Mark, a private recruitment agency is routinely inspected by the Department of Trade and Industry, through the Employment Agency Standards Inspectorate since 2004. Once they breach basic standards of teacher recruitment, the UK government has authority to withdraw their privileges.

In addition to addressing the management of private recruiters, the Commonwealth working group centers on the qualification of overseas teachers. They set out a list of recommendations for member states in order to assist migrating teachers and to enrich the education system for the benefit of all learners including: 1). Develop a teacher qualifications comparability table.2). Build on existing structures and systems including qualification frameworks and quality assurance systems. 3). Establish a network of Commonwealth qualifications authorities. 4). Encourage support and cross-country links among teacher professional registration authorities. 5). Reinforce the professional status of teachers by encouraging and supporting the profession to develop Standards for professional registration. 6).
Critiques and Challenges of the Protocol

The critiques and challenges of this protocol still remain. First of all, critiques stated that this international agreement within the Commonwealth is not a legally binding document and requires just voluntary cooperation. The protocol itself does not hold any “legal authority”; member countries are just “encouraged” to develop regulations or legislation to meet this commitment. For example, as many researches indicate, teaching abroad for teachers from developing countries is extremely attractive. Without any authority involvement or legislation, for-profit recruitment agencies can easily cross the line and act against this commitment.

A second criticism focuses on the practical workings of the protocol. Many poorer and smaller Commonwealth countries lack resources, i.e. human and financial, to enforce the various recommendations from the document. For example, although this protocol outlines many responsibilities for the source country, such as managing the teacher supply and demand in the domestic market, many of them, especially in small states, do not even have any database of the teacher workforce. Therefore, how can they make decisions to provide quotas of available teachers for international recruitment? Some states with more decentralized education systems also make accurate data gathering regarding the teacher labor force relatively difficult. In addition, this protocol calls for establishing a system of complaint mechanisms and clearance certifications, however, until today, this support and monitoring system has not been set up yet throughout the Commonwealth except in programs such as Quality Mark, established by the DfES in the United Kingdom.

Third, the lack of a Commonwealth-wide system to determine the standards and qualifications of overseas-trained teachers is still a serious challenge. In order to decide whether “brain drain” or “brain gain” is occurring in the source country, they need to develop a standard to determine, measure, and monitor a baseline of overseas teachers’ skills. Many studies indicate
international teachers are relatively high quality (Appleton et al., 2005) and several studies reports, such as *The Recognition of Teacher Qualifications and Professional Registration Status across Commonwealth Member States*, South Africa Qualifications Authority and Commonwealth Secretariat (2006), shows that the quality of teaching in recruiting countries is not equivalent to the one they had at home.

Finally, the protocol still needs more “promotion” to raise public attention and the strategy to extend this protocol to cover non-Commonwealth countries is still indistinct. A survey, from Commonwealth Secretariat (2006), indicates that few overseas-trained teachers were aware of this protocol or understood their rights for teaching abroad. Private agencies, schools, individual oversea-trained teachers, as well as teachers’ unions should be comprehensively informed.
Chapter Five: Conclusion and Policy Recommendations

In this concluding chapter, I begin by highlighting the findings of this study and reflect on what has been learned about the phenomenon of the transnational mobility of teachers. Some salient features of the international teacher movement, such as teachers as mass workers of the delivery service and their changing roles in the knowledge-based society have been observed. Three models of transnational teacher mobility in different time periods, including the “Colonial model,” “Nation-exchange model” as well as the “market-driven” model, complied with different program goals, teacher roles and the involvement of institutional actors will be discussed as the key findings in this study. Four possible transnational teacher transfers, North-to-North, North-to-South, South-to-North and South-to-North will be described and outlined in this chapter to broaden the understanding of the complex and diverse phenomenon of the transnational teacher movement. Also, I would argue that a multilateral framework for regulating the transactional teacher flow is crucial, especially since there is currently no global institution regulating the international teacher flow. However, some transnational agreements, such as Commonweal Teacher Recruitment Protocol, adopted by pan-Commonwealth countries in 2004, should be valued as a benchmark or milestone to forward this issue.

In addition, what theoretical framework should be accounted for to describe this recent emerging but relatively multi-faceted phenomenon of transnational teacher mobility will be concluded in this final chapter. I found that the prevailing theoretical paradigms used to analyze global trends in mass schooling, such as neo-institutionalism, world culture theory, and core-periphery theory, ignore the growing body of research on the teaching labor workforce, since I have explored how labor-market theories conceptualized the issues of teachers as members of a workforce, either from the macro or micro perspective. Hence, incorporating labor-market theory into world culture theory not only helps us advance our theoretical understand of how transnational teacher mobility developed, but also helps policymakers anticipate the trends and
changes of this phenomenon.

Appropriate policy responses to this issue are considered and addressed at both the national and international levels. In the context of the increasing number of teachers moving across national boundaries, following the South-to-North or South-to-South movement under the market-driven model, the main policy issue was highlighted specifically on monitoring, intervening in, and managing or regulating transactional teacher migration. Common policy problems of teacher shortages and policy issues for both source and receiving countries were addressed. For receiving countries, hiring overseas-trained teachers can be treated more as a “band-aid” rather than a cure to the symptom of teacher shortages. Over-relying on the aid from overseas-trained teachers might mask the root causes associated with the local teacher shortage. For sending countries, although many of them worry about the brain drain of highly skilled labor, a mutual benefit might be a gain for both sides, especially when the international teachers’ migration is temporary. In the nation-exchange model, this follows the direction mostly from North-to-North or North-to-South. Since nation-exchange programs, such as the Fulbright Teacher Exchange Program, are valued as professional development avenues for individual teachers, providing diversity ideas for schools and global awareness for the community, policy recommendations, such as the open culture-exchange door for in-service teachers, as well as required oversea teaching experience for pre-service teachers should be considered to improve the quality of the teacher workforce in the future.

For the North-to-South teacher migration like the Peace Corps, expanding the scale of volunteer teachers and developing more flexible “Globe-Teach” programs will be highly recommended. Transnational institutions, such as ILO, WTO and Commonwealths, which have interests about the issue of transnational teacher recruitment and migration, should involve and play more active roles in assessing the dynamics and impacts of these flows. By researching and examining this issue, these agencies can contribute to set up the international benchmark for effective and ethical practices in international teacher recruitment.
In sum, policy implications and recommendations for different models as well as for each possibility of teacher transfer will be addressed at the national and international level to show how transnational teacher exchange, contribution, and migration could shape the teacher workforce in the future.

1. Findings

Teachers are now migrating internationally in patterns that differ from historical ones

The trajectory of transnational teacher mobility overtime seems to follow three models: the colonial model, the nation-exchange model and the market-driven model. Each model will include different timeframes, driving forces, directions of mobility, teachers’ roles, and the political, culture and economic purposes (see table 5.1)
Table 5.1 Three Models of Transnational Teacher Mobility

<table>
<thead>
<tr>
<th>Time period</th>
<th>Colonial Model</th>
<th>Nation-Exchange Model</th>
<th>Market-Driven Model</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Per-World War II</td>
<td>World War II to 1990s</td>
<td>1990s to present</td>
</tr>
<tr>
<td>Driving force</td>
<td>• Colonial power</td>
<td>• Nation state</td>
<td>• Teacher labor market</td>
</tr>
<tr>
<td></td>
<td>• Civilization</td>
<td>• Mutual understanding</td>
<td>• Teacher shortage</td>
</tr>
<tr>
<td></td>
<td>• Assimilation</td>
<td>• Culture exchange</td>
<td>• Supply and demand rule</td>
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<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Direction of mobility</td>
<td>• North to South</td>
<td>• North to North</td>
<td>• South to North</td>
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<tr>
<td></td>
<td></td>
<td>• North to South</td>
<td>• South to South</td>
</tr>
<tr>
<td>Institutional actors</td>
<td>• Colonial government</td>
<td>• Nation state</td>
<td>• Non-governmental organization</td>
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<td></td>
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<td></td>
<td>• Corporations</td>
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<td></td>
<td></td>
<td></td>
<td>• Individual teachers</td>
</tr>
<tr>
<td>Role of teacher</td>
<td>• Agent of colonial power</td>
<td>• Culture carrier</td>
<td>• Mass worker</td>
</tr>
<tr>
<td></td>
<td>• Obedience and loyalty enforcer</td>
<td>• National ambassador</td>
<td>• Knowledge delivery</td>
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<td></td>
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<tr>
<td>Political</td>
<td>• Control</td>
<td>• Bi-national agreement</td>
<td>• Multinational agreement</td>
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<td></td>
<td>• Ruler/Ruled</td>
<td>• Diplomatic relationship</td>
<td>• Transnational negotiation</td>
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<td></td>
<td>• Subordination</td>
<td>• Peace making</td>
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<tr>
<td>Culture</td>
<td>• Culture confrontation</td>
<td>• Culture confrontation</td>
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<td></td>
<td>• Dominate culture</td>
<td>• Multicultural</td>
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<td></td>
<td>• Culture unification</td>
<td>• Culture diversification</td>
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<tr>
<td>Economic</td>
<td>• Natural recourse exploitation</td>
<td>• xxx</td>
<td>• Human capital</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Nation-state economic competition</td>
</tr>
</tbody>
</table>

The form of transnational movement of teachers, organized by the colonial government, acting as the agent for colonial power, was categorized into my first model: the colonial model. The case that represents this colonial model of teacher migration is one in which thousands of Japanese teachers were shipped to Taiwan during the Japanese colonial period (1895-1945). By
creating a modern education system in Taiwan, the Japanese government believed that education would secure the cooperation of the natives and perhaps eventually assimilate them. Schools, as well as teachers would help control the people since education acted as an “ideological arm of the military.” With the power of education, it could transform a “segment of traditional China” into an “integral part of modern Japan.” In order to achieve two main tasks of education: install the royalty in Japan and provide the Taiwanese with basic skills for development of the colony, the Japanese government recruited thousands of Japanese teachers to teach in Taiwan during that period. Japanese teachers, at that time, were acting as performers of colonial power to “civilize” natives and “Japanize” Taiwanese society. Although the Japanese education in Taiwan was mostly regarded as an essential instrument of fundamental social, political, economic, and culture change to exploit colonists in Taiwan, some scholars argued that Japanese teachers, to some degree, also spread the seeds of the modern education system in Taiwan.

After World War II, I observed that a growing number of teachers started to teach abroad through the teacher exchange program, established and financed mostly by nation states or government-related institutions. I call this form of teacher migration the “nation-exchange model.” One of the most famous teacher exchange programs to illustrate this model is the Fulbright Teacher Exchange Program. This program was established by Senator J. William Fulbright in 1946 and is sponsored by the Bureau of Educational and Cultural Affairs of the United States. Rather than migrant for religious purposes or to assimilate people into the colony, teachers moved around the world based on the mission of mutual understanding of cultures, customs, and languages. Because of the influence of world war affairs, Senator J. William Fulbright believed that international good will could be promoted through exchanging students, teachers and scholars in the fields of education, culture and science.

The Japanese Exchange and Teaching program (JET) is another example that illustrates this “nation-exchange model,” as nation states exchange teachers internationally. JET was established in 1987 with the purpose of increasing mutual understanding between the people of
Japan and the people of other nations. Founded mainly by the Japanese government, they want to promote “internationalization” in the local communities. The method they employ is to develop an international exchange at the community level by improving foreign language education. In addition to these official goals of the JET program, the driving force for the JET program includes three dimensions: a geo-political crisis from foreign pressure, a lack of global integration and continual reform of English education.

The number of participants has seen significant growth, from its original 848 participants from four countries (the United States, the United Kingdom, Australia, and New Zealand) in 1987 to 4,682 participants from 38 countries in 2008. In total, over 46,000 people from 55 different countries have participated in the program since its inception, making it the world's largest exchange teaching program.

Although the goal of transnational teacher flow in the nation-exchange model is different from the colonial model -stating that mutual understanding, peacemaking as well as equal treatment are their main missions -critics argue that this nation exchange model can be regarded as a form of Neocolonialism. Neocolonialism is a term used by post-colonial critics of developed countries' involvement in the developing world. The term usually assumes that” powerful” countries will be involved in the affairs in less powerful countries, particularly after colonial independence, e.g. the widespread movement of many new nations in the post–World War II period to gain independence. Unlike colonialism, which saw the use of direct military or political power to control a country, neocolonialism uses a different way to control developing countries, including economic, cultural or linguistic methods. By promoting the culture, language or education system of the former colonizer, this kind of teacher exchange program, it is argued, becomes “cultural colonialism”

The most recent pattern of transnational teacher mobility is called the “market-driven” model. The driving force behind bringing international teachers to teach in the local school district mainly resulted from the teacher shortage in hard to staff inner cities or very rural schools
and in hard to staff disciplines, such as math, science, and special education. For-profit recruiting agencies have been heavily involved in the process of international teacher recruitment, and have become the major institutional actors under this “marker-driven” model. In this study, Visiting International Faculty Program (VIF), the largest recruiter to bring teachers to the United States on J-1 visas, was used as the case example to illustrate this model.

Under the market-driven model, the “privatization” of agencies, which were actively involved in international recruitment, is a crucial factor that accelerates transnational teacher mobility. Because of their financial interests, these agencies sometimes mislead teachers and charge inaccurate exchange fees, creating a form of exploitation. As a result, lawsuits by international teachers against agency recruiters are increasing in number and frequency. For example, in May 2002, 15 international teachers asked the Newark Teachers’ Union to help them in lawsuits against their recruitment agency, the Teacher Placement Group (TPG) since they are forced to sign a contract that obligates them to pay 25% of their salaries to TPG.

Changing Role of International Teachers

Some basic roles of teachers remain the same, such as providing instruction in literacy and numeracy; however, some “hidden roles” or “extra roles” of teachers who travel overseas have changed. In the colonial model, the form of transnational movement of teachers, organized by the colonial government, functioned more like an agency advocating for colonial power. Of course, they still facilitated student learning, but one of their major missions was to act as performers of colonial power to “civilize” natives and enforce obedience and loyalty in colonial society. For example, thousands of Japanese teachers were shipped to Taiwan during the Japanese colonial period (1895-1945) to educate Taiwanese and help control the people since the Japanese government regarded education as being able to act as an “ideological arm of the military.”

After World War II, a growing body of teachers started to teach abroad through the teacher exchange program, which was established and financed mostly by nation states or government-related institutions, as a nation-exchange model. In this model, the major role of the
transnational teacher was as a “culture carrier,” “nation ambassador” or “peace maker” since the main goals of these exchange programs are typically to broaden the mutual understanding of each country on their cultures, customs, and languages as well as to reduce conflicts and eliminate war.

Unlike acting as culture carrier or nation ambassador in the nation exchange model, transnational teachers in the “market-driven” model, are more like “mass workers.” Driven by the force of the teacher shortage, international teachers were “imported” to staff inner cities or rural schools and teach in hard-to-staff disciplines, such as math, science, and special education. Like many unskilled or less-skilled labor imported during the 1970s and 1980s for economic growth, international teachers were becoming more like mass workers to provide their service for demand reasons; this caused a situation in which strictly checking their professional credentials was not done as it is done for most international nurses or physicians.

Transnational Teacher Mobility is a Multi-directional Process

In addition to categorizing different models of transnational mobility with different goals and institutional actors in different time periods, directions of transnational teacher migration have been examined in this study. These include four directions of teacher movement: North-to-North; North-to-South; South-to-North and South-to-South (see table 5.2).

Table 5.2 Directions, theoretical approaches and policy implications of transactional teacher mobility
The direction of the North-to-North teacher movement particularly looks at teachers who move between industrialized countries, initiated for culture exchange as well as professional development. Programs, such as Fulbright Teacher Exchange Program (FTEP), provide this opportunity for K-12 teachers from more developed countries to exchange their “brain” into other

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industrialized countries. North-to-South teacher mobility focuses on teacher movement from industrialized countries to developing countries. This phenomenon can be illustrated by the Peace Corps program, which was designed to provide volunteer teachers to meet local needs in developing countries as well as to promote responsibility for global citizenship. The teacher flow from developing to industrialized countries is regarded as a South-to-North flow. Like many migrating skilled or less-skilled workers, South-to-North teacher mobility is mainly driven by the force of the global labor market, illustrated by teachers seeking higher pay or better working conditions. The Visiting International Faculty (VIF) program is an example to illustrate this form of teacher transfer. Acting as an active international teacher recruiter, VIF recruits K-12 teachers from countries like the Philippines, Jamaica, and India, and places them in hard-to-staff school areas in the United States. The final type of transnational teacher mobility is called South-to-South migration, which moves people between developing countries. This type of teacher transfer can be demonstrated by some commonwealth states, like Botswana, which rely on around 4.5% expatriate teachers mainly from developing counties, such as Zambia, and Guyana to run their school system.

Table 5.2 also shows that the direction of teacher migration does not always follow the South-North direction. A relatively high interest in teaching overseas is expressed by teachers in host countries, such as the UK and Australia; this implies some potential to lead the North-South or North-North movement. The driving forces for these teachers who show their interests in teaching abroad are professional development and travel opportunities rather than just salary gains. For example, the data from the VIF case shows that one in three overseas-trained teachers recruited by VIF is moving between industrialized countries, from countries like Canada, Australia, and Europe to the United States.

There are also some examples of teacher flow from one developing country to another, even though this group of teachers is relatively small. For example, Jamaica is a country with a longstanding tradition of losing its teachers to other islands in the Caribbean. Countries, likes
Botswana, rely on around 4.5% expatriate teachers to run their school system. Expatriate teachers in Botswana come from a wide variety of countries, mainly from developing counties, such as Zambia, India, and Guyana. The driving force of this South-to-South teacher migration may include not only income differentials but also the political factors, such as unstable political and social circumstances. Geographic factors, such as geographic distance, can be another reason that inspires teachers to move to neighboring countries. Also, factors sometimes linked to HIV/AIDS have a significant impact on a teacher’s decisions to embark upon an international migration or career change in developing counties.

The Peace Corps exemplifies a North-to-South teacher transfer. This program provides opportunities for education volunteers ranging from secondary English teaching, secondary math and science teaching to primary teacher training. All education positions require at least a bachelor degree and a minimum GPA of 2.5, but different positions have different requirements. For example, the qualifications for secondary math teaching are to have a bachelor degree in math, computer science, or engineering. Applicants with a degree in secondary education with a concentration in math or a degree in any discipline with certification in secondary math are also considered as qualified to be Peace Corps teachers.

*The Limits of Current Theory: Incorporating Labor-Market theory into World Culture Theory*

As table 5.2 shows, neo-institutionalism or world culture theory provide a useful explanation for North-to-North and North-to-South transnational teacher mobility, since these theories predict that “national scripts” for teaching and a world-wide culture of norms and expectations for curricula, and school organization have become more “isomorphic” and “homogeneous” (Stigler, 1999; Meyer, 2007). With these homogenized and standardized curricula of what teachers should do around the world, teachers can quickly “fit-in” to the classroom in different countries, which makes international teacher mobility more possible. However, what really motivates teachers to move even if the core curriculum is standardized and to what extent do nations allow more and more non-nationals to educate future citizens of nation-
states? Income disparities as well as the increasing global teacher shortage, formulated by labor-market theorists, give us a valuable theoretical framework to address these issues, particularly focusing on South-to-South and South-to-North teacher migration. Hence, as I argued before, neo-institutionalism and world culture theory provide some answers to understanding the how and why of the international teacher flow but these theories seem to ignore the motivation, aspiration, and personal goals of individual teachers making the decision to move around the globe. Incorporating the labor-market theory—understanding teachers who increasingly participate in a workforce in the global market that is affected by a global imbalance in economic and military power can help us advance our theoretical understanding regarding these issues (Wu & LeTendre, 2011).

II. Reflections

*Teachers as Mass Workers in the Global Labor Market*

Since the General Agreement on Trade in Service (GATS) includes teachers, the presence of nationals who have greater freedom to travel from their own country to supply services to another, the phenomenon of transnational teacher mobility is causing greater concerns in the teaching and student community than ever before. A most recent report, *Importing Educators: causes and consequences of international teacher recruitment*, launched by the American Federation of Teachers (AFT) in 2009, gathered a lot of attention regarding this issue. This report focuses on the little-known but growing number of overseas-trained teachers teaching in American’s primary and secondary schools. The migration trend of highly skilled workers and their impact was addressed and discussed in this report. An earlier report, *Teacher at Risk-Teacher Mobility and Loss in Commonwealth Member States*, from UNSECO (2003) indicated that transnational teacher mobility has become an emerging issue and might lead to a teacher loss in developed countries because of international teacher recruitment. It also discusses the potential impact of teacher migration on education for all and millennium developmental goals.

For many decades, unskilled or less skilled workers affected by globalization have had to
go overseas to find jobs with higher wages or better working conditions, but today, teachers as well as other professionals seem impacted by globalization in a new way. The transnational teacher movements, in GATS’s terms, are known as “temporary movement of individual service suppliers.” These individual service suppliers are recognized and categorized in the so-called “fourth mode,” such as auditors or physicians in this multilateral agreement. With the increased liberalization of barriers to the movement of people, teachers can be “exported” with their services from one country to another.

Under this General Agreement on Trade in Service (GATS), however, as Mattoo (2003) reminded and suggested, the movement of a person from one country to another should consider three dimensions: length of stay, level of skills, and nature of contract. The length of stay can range from a single day to a permanent stay. In general, teacher migration is regarded as the temporary movement of a national. For example, unlike the majority of foreign-educated nurses who receive green cards in the United States, the large portion of overseas-trained teachers who work in America on temporary visas with the maximum of a six-year period, return once the visa is expired. The migrant person can possess no professional skills or be the master in a particular field. K-12 teachers can be put somewhere up the scale, as high-level skilled workers to provide their individual services. Teachers can be independent professionals who sign contracts with recruiting agencies or schools and districts, rather than transfers from headquarters to a local branch.

In Teaching in the Knowledge Society, Hargreaves (2003) states that teachers are no longer acting as moral enforcers, vocational skill trainers or basic knowledge instructors as was the case in the post-Fordist industrial era. Today, in the information society, instead, he argues that teachers are increasingly playing a key role in global knowledge production. They are asked to transform themselves into a kind of special knowledge worker in order to create a knowledge society, which is stimulated and driven by creativity and ingenuity (Hargreaves, 2003). Developing this form of human capacity and skills will enable individuals, organizations, and
nation states to survive and succeed without being left behind. Following this assumption, teachers and schools are required to prepare students with sufficient and adequate knowledge to help them develop, apply and extend global skills and knowledge (Hargreaves, 2003).

Based on the notion that teachers deliver knowledge and develop knowledge societies, a growing trend of teachers as mobile knowledge workers in the global market has been recognized (Edward & Spreen, 2007; Castells, 2000). However, one powerful and fundamental question remains: Why do we need more qualified teachers than ever before? According to Akiba and LeTendre (2009), this global trend for improving teacher quality is mainly driven by the idea that the teacher workforce is a key element for global economic competition. It follows the logic that teacher quality represents the human capital development in each country and directly links educational outcomes and a nation’s economic power. This transnational acceptance of improving teacher quality to create better human capital for national economic development echoes the notion that schools and teachers play a crucial role in the era of the knowledge society.

Although global economic competition is not the only goal of education, almost every country regards education as a fundamental vehicle for developing their country. Harden (2006) observes a global trend of education development in the era of globalization, as containing a powerful challenge and many opportunities. Countries around the world, as he points out, have three similar ambitions regarding education. The first is to provide greater access for education, not only for fundamental K-12 but also to admit more students into a university. The second is to increase equality to offer assistance to students who are disadvantaged because of their social, culture, or ethnic backgrounds. The last one, as described above, is to improve the quality of education necessary to face international competition.

In the book, *In Rise of the Network Society*, Castells (2004) argues the most important commodity, information, flows around the globe via technical communication in the post-industrial world. Teachers have knowledge and flexible skills that assist them in moving across national borders with relative ease. He believes that knowledge has become a form of “portable
human capital” in the era of the global knowledge economy. Hence, special workers with professional knowledge can be traded and replaced possibly in the network and knowledge-based society. Since this reserve pool of labor has become global, as GTAS states, by moving teachers to deliver services, employers are able to find teachers who are willing to work abroad. Moreover, in the era of increased global communication, individual teachers are able to make contact and share information about job opportunities around the world. However, this important new trend of recruiting teachers from nearly all corners of the global has potential impacts on the quality of educational services not only in source countries but also in receiving countries.

**Significant Institutional Actors Shifting Overtime**

The roles and functions that significant institutional actors play also shift over time. In the Colonial model, colonial governments were the only actors to plan and ship teachers to the colonial territories since education was a major channel for “civilized” colonists and was used to keep them in a state of obedience. In the nation-exchange model, nation states played a critical role and were heavily involved in the operation of transnational teacher mobility. Teacher-exchange programs under this model were primarily established and implemented by nation states, local authorities, or government-sponsored organizations. Governments or government-related institutions have become the most important agencies that facilitate and promote international teacher exchanges. Institutional actors in different levels of government commonly cooperate and communicate in order to achieve their program goals. Under the market-driven model, the “privatization” of agencies, which were actively involved in international recruitment, is a crucial factor that accelerates transnational teacher mobility. Expanded private agencies have engaged in recruiting teachers from abroad. They use several methods to recruit teachers, including advertising on the Internet, recruiting via telephone, and advertising in the local media of sending countries. Instead of direct recruitment by schools or local governments, private agencies can smooth the burden of red tape from bureaucracy for teachers (UNESCO, 2003).
Regulating International Teacher Recruitment

In fact, this market-driven model, solving teacher shortage by recruiting international teachers, has raised worldwide attention and global concern for its far-reaching impacts, specifically where the movements are South-to-North. In 2004, 53 countries of the Commonwealth signed the Teacher Recruitment Protocol. The main purposes of this protocol are to protect the rights of teachers, the integrity of national education systems, as well as to prevent the exploitation of the scarce human resource from poor countries (Commonwealth, 2005). By identifying the rights and responsibilities from both sending and recruiting countries, this document develops and serves as an excellent model for regulating the process of international teacher recruitment. Although many states in the world are not members of the Commonwealth, the principles outlined in this protocol should be highly valued and considered to meet the standards of ethnical international teacher recruitment.

The Protocol on Teacher Recruitment was initiated at a meeting, organized by the Commonwealth Secretariat, at the Hotel Savannah Barbados in July 2002. The Caribbean ministers of education raised a concern of negative impacts of organized teacher recruitment on small island states and searched for Commonwealth assistance. Jamaica’s Education Minster Henry-Wilson also asked the Commonwealth Secretariat to be engaged in wide-scale debates on teacher training, migration and responsible recruitment for the benefit of both source and receiving counties.

Through the long process of intensive discussion, drafting and redrafting, all ministers present at the meeting (totaling 23 Commonwealth Ministers of Education including Jamaica, South Africa, Kenya, and the United Kingdom) signed the Commonwealth Teacher Recruitment Protocol in September of 2004. The protocol aims to protect the integrity of national education systems and prevent the exploitation of the scarce human resource of poor countries. This protocol also seeks to safeguard the rights of international teachers and their working conditions in the recruiting countries. By doing so, this protocol clearly outlined the rights and
responsibilities of recruiting and sourcing countries as well as that of recruited teacher. Although major critiques and challenges of this protocol are the lack of legal authority to implementation these guidelines and that it just encourages voluntary cooperation to meet this commitment, Morgan (2005) valued this protocol as a major success for Education Section of Commonwealth Secretariat because it is a leading agreement on the regulation of recruiting foreign teachers. This protocol should be regarded as a milestone for regulation of international teacher recruitment, not just for Commonwealth countries but also for non-commonwealth states in the world.

*Barriers of Transnational Teacher Mobility*

If transnational teacher mobility works as an panacea for national teacher shortages, why don’t we see more teacher transnational mobility? The number of transnational teachers, so far is relatively small compared to other professions like nursing. According to a report from AFT, the number of overseas-trained teachers being hired in the United Stated is estimated at 19,000, contributing to less than one percent of the total labor force. The top five states importing overseas teachers in 2007 were Texas, Georgia, New York, Maryland and California. According to the report from WTO, approximately 90,000 foreign-educated nurses work in the United States, representing about four percent of the registered nurse workforce. The leading source countries where foreign nurses received their initial education are the Philippines, India, Canada and South Korea. Most of the foreign nurses are employed in California, followed by the states of Florida, New York, Texas, New Jersey and Illinois.

The United States is not the only country that needs foreign nurses to take care of their patients; many countries relied heavily on foreign aid to run their medical care during the late1960s. New Zealand is the most active country to import nurses to run hospitals. About 23% of the total nurse workforce came from abroad. In the United Kingdom, more than eight percent of the nurses are foreign educated. Ireland has about eight percent and Canada has about six percent. Since the nursing faculty shortage remains a problem, and is driven by the local nurse
need, this transnational nurse mobility seems unstoppable. Based on OECD data, Australia needed 6000 registered nurses in 2004. The US is projected to require some 800,000 nurses in 2020. By 2015, the African region will need 255,000 physicians, almost a million nurses and 3,200 midwives by 2025 when the required number of health workers in Africa will be 1.325 million.

Lorenzo et al. (2007) highlighted this phenomenon of the global nurse labor market; they figured that there are 193,223 employed registered nurses working in foreign countries and the largest employers are Saudi Arabia, the U.S. and the UK. They found that the major source country is the Philippines accounting for about 30% of total internationally trained nurses in the US. According to Yamagata (2007), the deployment of international nurses has increased for countries like the UK, Ireland and Saudi Arabia; this was found by using more complete time series data (Yamagata, 2007). In his analysis, the US has slowed down in recruiting nurses relative to the UK, Ireland and Saudi Arabia, which remain the major destination countries for international nurse recruitments. The massive slowdown in the US may be closely associated with the change in immigration policy that occurred in 1996.

The report from ILO (2008) shows that there are three major barriers for international professional workers (i.e. nurses and teachers): legal barriers to entry, international agreements and natural barriers. The first barrier is national immigration policies that play a curtailing role in the acceleration or prevention of transnational teacher mobility. In the education profession, most countries do not allow people to apply for a tourist visa; they must apply for a working permit to legally work and the process for applications is always complicated and time consuming. For example, there are two main ways that international teachers can obtain legal status for working in the United States. One is the H-1B work visa; the other is an exchange J-1 visa. However, the quota of new H-1B visas that can be issued is limited per year and changes all the time. Employers, like states counties, other school districts, and recruitment agencies must file a Labor Condition Application (LCA) with the Department of Labor through an online system to hire an
international teacher.

The barriers for teachers to enter a new country may be mitigated by the presence of international agreements; however, it is difficult to reach a consensus for different parties regarding international agreement; there is a voice to protect the “integrity” of the educational system in developing countries and to avoid “exploitation” of their scarce human resources, which are strong and sound. For example, GATS was signed in 1995 and advocates removing legal barriers to trade services from many public sectors, like education; some anti-GATS groups believe that GATS undermines the authority of national governments. It is feared that students taught by foreign teacher will lose their national identity. K-12 teachers and school administrators should be taken out of GATS, critics argue, because this trade agreement always puts business’ interests over the citizens’ interests and makes it more difficult to regulate commercial activities within national boundaries. Groups like “GATSwatch” state that public sectors are “provided on a commercial base” and are open for “privatizations” and “marketization.” They believe it should be abolished or at least should be rewritten. (GATSWATCH, 2003).

The final barrier for transactional teacher mobility is that international teachers need to overcome language barriers. Local language proficiency is usually required since effective communication is critical in the delivery of education or healthcare. In the medical arena, Clemens and Patterson (2007) have pointed out that France requires its foreign-trained nurses to be fluent in French. In Austria, German language proficiency is required and requested for foreign nurses who stay at least five years in a German speaking country (OECD, 2007). Denmark and Finland also require language familiarity and tests. In education arena, small countries like Botswana require teachers to speak their local language: Setswana; international teachers with other language backgrounds have been considered as inappropriate to become elementary teachers.

III. Policy Implications and Recommendations

The impacts of transnational teacher mobility for both sending and receiving countries
remain varied. The main debate of this phenomenon is whether international teacher recruitments might lead to a persistence of a harmful “brain drain” in sending countries. In addition, the costs might include the loss of particularly effective teachers and the increase in the fiscal load to replace teachers because of those leaving from international recruitment. However, these negative aspects should be weighed with regards to the gains from the migration of teachers who send back remittances and from the effects when teachers ultimately return with improved professional teaching skills to contribute to their home countries.

For receiving countries, the major benefit of recruiting overseas-trained teachers is that it provides a solution to quickly solve the problems of difficult to hire teachers in hard-to-staff disciplines and locations. Bringing international teachers also brings diverse cultures into classrooms, schools and communities. Nevertheless, some negative and potential effects still remain. Using this only as an aid to bring foreign teachers to teach in the inner city or very rural schools or for specific subjects, or as a shortcut, may mask the root causes for dropouts or the shortage of local teachers.

Appropriate policy intervention is needed for both the host and source countries to minimize the negative aspects and maximize the positive effects. Instead of focusing on discussions about how such movement should be stopped, reduced or limited, in this section, I emphasized how to regulate the process of international teacher recruitment as well as how to manage the common problem of teacher shortages.

Policy Response under the Market-driven Model

For receiving countries, one significant policy question is whether international teacher recruitment alone should be treated as a panacea to cure the symptoms of teacher shortage. The answer is probably no. Many of these counties have failed to “grow their own” or more precisely “keep their own” teachers; as a result, they have used international recruitment as an option to quickly fix this staffing problem. Providing higher salaries and better working conditions as pull factors, receiving countries can relatively easily attract skilled workers from around the world
especially from developing countries.

- **Assuring the quality of overseas-trained teachers**

  In the market-driven model, recruiting teachers from overseas is driven by the emergency teacher needs to teach in hard-to-staff inner cities or very rural school districts. As a result, most overseas-trained teachers will be staffed in the relatively low-income and high-minority schools. In the receiving countries, such as the United States, teachers are the long-standing and most inequitably distributed education resource. This unequal access to qualified teachers, as Darling-Hammond (2010) indicates, has become a significant factor creating the unequal and inadequate gap of educational outcomes in the United States. Tatto (2006) illustrates this unequal distribution of quality teachers by using data from California. He found that the percentage of uncertified teachers in segregated minority schools is more than five times greater than in non-minority schools. Schools with more than 75% free or reduced-price lunch students are staffed with around three times the number of un-qualified teachers than those schools with less than 25% of students in free and reduced-price programs.

  Studies have confirmed that a teacher’s quality significantly is influenced by students’ achievement. Teachers’ academic backgrounds, preparation for teaching, certifications, as well as experience are all relevant quality indicators that affect students’ learning outcomes. Darling-Hammond (2008) examines the test score gains or losses of students taught by alternative route and traditional route teachers. She found that the reading and math achievement of students taught by alternative teachers with low-coursework in the fall to spring semester will decline significantly. By contrast, these scores of students taught by traditional route counterparts with high-coursework will increase nearly two norm curve equivalent (NCE) points. In other words, the achievement of students will be hurt by encountering less-trained, unprepared and temporary-licensed teachers. The influence of teacher quality on student achievement can also be found around the world. Akiba and colleagues (2007) examined the data across 46 nations and found that the most important factors that predict mathematics achievement are the teacher’s
certifications, whether or not he or she majored in mathematics or mathematics education, and whether he or she had at least three years of teaching experience.

Although the process of international teacher recruitment is highly selective, the quality of overseas-trained teachers remains a topic of debate. For example, in the case of VIF, the selection process includes a detailed application with essays, verification of credentials and experience, criminal-background checks as well as personal face-to-face interviews. Proficiency in English, holding a university degree as well as having teaching experience is also required. As a result, only seven percent of applicants are eligible to be VIF teachers in U.S. schools. Because of these strict screening processes, more than 80% of VIF teachers are rated as "outstanding/superior" or "above average" by school districts. However, in receiving countries, like England, the overseas-trained teachers are often rated as being of lower effectiveness by English head teachers. In some cases, overseas-trained teachers are often labeled as “instructors” rather than teachers. Hence, it is essential for receiving countries to re-examine the quality of overseas teachers and build an evaluation system, such as Qualified Teacher Status to ensure that there are high-quality foreign teachers. Having overseas-trained teachers and high quality teaching, students in low-income and high-minority schools may increase their learning performances and gradually narrow the achievement gap.

- **Providing transparency information and effective orientation for overseas-trained teachers**

  The above case study shows that the recruiting agency is an important force accelerating transnational teacher mobility. Because of their financial interests, these profit-driven recruitment agencies usually provide fragmented information maximizing the positive sides such as higher compensation and better working conditions and neglect the negative sides, like income tax rates and living costs. This misleading information that overseas teachers have received from the recruiting agency can easily cause inaccurate anticipations about life in the host country. As a result, this incorrect expectation of teaching in foreign countries leaves overseas teachers in vulnerable circumstances. To avoid the manipulation and exploitation of overseas-trained
teachers, recruiting agencies, local governments, school districts, and all relevant employers should be regulated and required to provide overseas teachers with transparent information about not only the benefits and costs of living in host countries but also the challenges of teaching and the deficiencies of the schools.

Moreover, some lawsuits involving recruiting agencies and overseas teachers regarding the stipulations point out the need for information and to realize the dangers and risks of teaching in receiving countries. All relevant information should be required to be provided to potential overseas teachers before they make their final decisions.

For all new overseas-trained teachers, a high-quality orientation is essential to assist them to adjust to the challenges of living in a different culture. The data have shown that local new teachers always have difficulties during their first years resulting in an attrition rate of around 50%; this number must be greater for foreign teachers. Overseas-trained teachers may have sufficient teaching experience but they often face starkly different behaviors from students and different expectations from parents in their new schools. They also feel isolated; this is especially true of teachers from the small pools in countries without familiar support networks. Hence, destination countries should create effective and professional support systems, such as employment assistant programs to help them overcome the emotional difficulties.

- **Improving data gathering for evidence-based policy formulation**

   The lack of comprehensive and accurate data about transnational teacher migration has become the biggest obstacle to understanding this phenomenon. These data limitations can easily impede the development of appropriate policy responses or mislead the formulation of policy. Traditionally, most receiving countries rely on the data from different sources such as work permits, visas, labor statistics or a census to track the inflow and outflow of teachers. However, it is not possible to provide an accurate picture of international teacher in-out flow relying alone on these channels. Rather, in order to achieve more reliable data, the information should be investigated and collected by stakeholders, including governments, local governments, school
districts, teacher associations, as well as recruiting agencies, etc. In addition to collecting available data, it is equally important to create a devised system to register the overseas-trained teachers in a professional institution such as General Teaching Council (GTC). Once relevant information is verified, collected and monitored, it enables policymakers to assess and formulate more effective policies in response to international teacher recruitments.

- Facilitating the channels and add value to encourage teachers to return

As noted earlier, sending countries can possibly benefit in the process of international teacher mobility if these migrations are temporary. Potential advantages include the income from remittances. Sending back money from international teachers to family or friends can boost the local economy. Also, if migrant teachers eventually return to their countries of origin with new skills, knowledge and experience, they can be used as experts and re-enter the teaching profession to develop and improve the local service. Instead of over-simplifying the ideas of “brain-drain” in sending countries, transnational teacher movements should be regarded more as “brain-gains” or “brain-circulations” once the teachers return and contribute to their school system. From this perspective, the government of the sending country should consider allowing teachers to take a few years of unpaid leave to work abroad. Discouraging or disallowing international recruitments should be reconsidered. The government in sending countries, such as South Africa and Jamaica, should encourage teacher return and re-entry to their education system in order to ensure that sending countries can get the full benefit from the returned teachers’ experience and professional skills. The policy for migration of teachers should not only facilitate the channels to encourage the return of teachers but create approaches to the ways that returned teachers can add value from what was acquired abroad, such as regarding them as Master Teachers, acting as mentors to their colleagues and involving teaching innovation or curriculum development.

Policy Response under the Nation-Exchange Model

Since nation-exchange programs, such as the Fulbright Teacher Exchange Program, have valued professional development for individual teachers, diversity ideas for schools and global
awareness for communities, the benefits of teacher exchange should not be limited to a small group of teachers. The following policy recommendations should be considered to improve the quality of the teacher workforce in the future.

- **Open culture-exchange doors for in-service teachers**

  With the conditions in the world today, teachers are faced with increasing numbers of immigrant students in their classrooms. They work with students from cultures other than their own. In order to effectively assist different ethnic and linguistic minority students, significant cultural immersion experience is required for each teacher to achieve this objective. Unfortunately, the vast majority of the teaching workforce in the United States lacks the opportunity to have this cross-cultural experience. Traditional approaches for teacher training require them to take a course in multicultural education or peace education that is provided by many universities and schools of education. However, reading a textbook and conducting a course discussion alone are no longer sufficient. Researchers have pointed out that effective culture learning requires significant, long-term, and direct personal interaction with people and contexts that are not familiar to them. International teacher exchange programs, like the Fulbright Teachers Exchange Program provides an ideal channel to access this intercultural experience. However, the chance to gain these rewards for teachers to win is very slim. Policymakers should increase these exchange opportunities for each K-12 teacher. This cross-culture learning experience will help them to become more worldly teachers to meet the needs of the 21st Century.

- **Require overseas teaching experience for pre-service teachers**

  Taken a step further, an extension to each candidate teacher for having an overseas teaching experience is highly recommended for pre-service teacher training policy. To promote this idea that each K-12 candidate teacher should spend a period of time teaching abroad, a pioneer overseas student teaching program, such as Consortium for Overseas Student Teaching (COST), should be considered and emphasized as a guideline to create universal overseas student-teaching programs.
Established in 1973, the COST has become one of the oldest organizations facilitating international student-teaching placement. This program was established as a formal organization through a coalition of faculty from 15 United States colleges and universities, mostly located in the central portion of America such as the University of Kentucky, and 28 colleges and universities from other countries. This COST program was initiated to address the problem that students attending teacher education programs had little or no intercultural experience. The founders believed that this program could help teacher candidates “reduce cultural barriers and increase global understanding.” Each year, around 60 to 75 American students choose to teach through COST placement in national schools in countries like Australia, Bahamas, Canada, England, Ireland, New Zealand, Scotland and South Africa. Thousands of student teachers have participated since COST was founded (Cushner and Brennan, 2007). Similar programs for prospective teacher candidates are found in California State University. Their International Teacher Education Program was established in 1994 to provide a bilingual student-teaching exchange to Mexico. This program became the only international credentialed program in California to be approved by the California Commission on Teacher Credentialing (Cushner and Brennan, 2007).

Like the North-to-North exchange teachers, organized by the Fulbright Teacher Exchange Program, who express positive effects of their overseas teacher experience, the influence of student teaching abroad is beneficial. Well documented data show that such intercultural teaching experiences increase a person’s professional knowledge, skills, and dispositions while teaching abroad. The literature reviews of research consistently show that such experiences result in increased personal and professional competence. For example, Cushner and Mahon (2002) summarized that the report from students who joined these overseas teaching programs shows that such an experience impacts them; it improves self-efficacy, cultural awareness, as well as professional development of global-mindedness. Quezada (2004) concludes three general themes that student teachers gain from overseas teaching experiences: instructional
pedagogy, learning about self and genuine multiculturalism.

- **Expanding the scale of Peace Corps Teachers**

  This form of government-financed program, sending K-12 teachers to developing countries, can be regarded as the effort to supplement an American public diplomacy outreach. Unlike the Fulbright Teacher Exchange program, exchanging their teachers mostly from North-to-North, the Peace Corps focuses clearly on North-to-South teacher transfers. Acting as an altruist, K-12 volunteer teachers work in poor countries, making a meaningful contribution to schools and communities where they mostly need teachers. Peace Corps teachers teach a range of subjects from English, math, science, and computer skills to HIV/AIDS awareness. Although Peace Corps teachers give service without payment or rewards, both tangible and intangible benefits for North-to-South teachers have been recognized and reported by returning teachers since the inception of the Peace Corps. Because of these far reaching impacts on helping people in developing countries to meet their needs, prompting better understanding between Americans and other people, the President of United Stated, Barack Obama, has promised to double the size of the Peace Corps to 16,000 by 2011 since educational services is a major work area. The U.S. Federal Government has raised the budget by more than one-third to run the program, from $340 million in fiscal year 2009 to $446 million in 2011.

- **Creating more flexible “Global-Teaching” programs**

  Op-ed columnists, like Nicholas Kristof at the New York Times encourage young people to participate in this public service to represent the best ethics of their generation. Rather than just teaching in America locally, he campaigns that young teachers should spend a period of their lives in foreign counties. He gives credits to the programs, such as Peace Corps and Teach for America, to provide access to public service for young people. However, some deterrents of the Peace Corps teaching program still remain including the request for a more flexible program, that is, shorter term, with less red tape should be created to promote the ideas of global teaching and volunteer service.
Finally, no matter nation-exchange or market-driven model, since international teacher mobility often involves movement from different state sectors of countries to another, international agencies, which have stakeholder interests, should engage and play more active roles in the process of international teacher recruitment. These international agencies include UN agencies (such as ILO, International Organization for Migration, and WTO); multi-country organizations (for example, EU and Commonwealth); and trade blocs (such as NAFTA). There are two main roles that transnational institution actors should play regarding the phenomenon of international teacher mobility. The first element is to develop a more complete and accurate picture of trends of international teacher migration. By examining and researching the rate of cross-border teacher flow, these agencies assist us in understanding this dynamic phenomenon as well as the impacts for both sending and receiving countries. The second role of international institutional actors is to contribute to the establishment of an international principle for more effective and ethical processes of international teacher recruitment (WHO, 2003).

In order to achieve this benchmark for balancing the rights and responsibilities of both sending and receiving countries, international agencies should act as significant coordinators to negotiate this multi-nation agreement, especially facing countries with opposing interests. In addition to the role of coordinator and negotiator of creating benchmarks for international teacher recruitment, international institutional actors should develop their capacity to monitor and evaluate the status of the organized recruitment of teachers. Once unethical international teacher recruitment occurs, international agencies can intervene and have authority to restrict this form of mobility as well as to protect the rights of each teacher.
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