

**FACTORS INFLUENCING THE MIGRATION OF TEACHERS FROM ZIMBABWE  
TO SOUTH AFRICA**

**by**

**Zenzele Lungile Weda**

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## **DECLARATION**

I, Mr Z.L. Weda, declare that **FACTORS INFLUENCING THE MIGRATION OF TEACHERS FROM ZIMBABWE TO SOUTH AFRICA** is my own work and that all the sources that I have used or quoted have been indicated and acknowledged by means of complete references.

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**MR Z.L. WEDA**

**Student No: 46139516**

## ABSTRACT

Zimbabwe is suffering from an acute shortage of teachers mainly as a result of teacher emigration to South Africa and abroad. The southern migration of Zimbabwean teachers has received little research attention which has mainly focused on the migration of medical personnel. The purpose of this study is to uncover the factors that drive the migration of teachers from Zimbabwe to South Africa and to explain how these factors function within a grounded theory approach to teacher migration. To achieve this, a review of literature and an empirical study of a small sample of migrant Zimbabwean teachers resident in South Africa were undertaken. A constructivist grounded theory design was used. A theoretical sampling method generated a sample group of thirteen participants who were all qualified Zimbabwean teachers who had migrated to South Africa and been in the country for between one and five years. Data generation and collection consisted of two phases: in the first phase the participants were asked to write a life history narrative or provide a verbal narrative of their life history focussing on their migration. In the second phase they participated in individual interviews to clarify or expand on issues raised in the first phase. Three stages of coding were used in the analysis of the data, namely initial, intermediate and advanced coding. This led to the generation of a grounded theory on teacher migration. The grounded theory indicated that Zimbabwean teachers see migration as the best way to attain an ideal status. An ideal status is conceived to be the ideal interplay between the work conditions, standard of living and social esteem which teachers believe befits members of their profession. Depending on various criteria, teachers fall into one of the following status categories: further diminished status, diminished status, ideal status or ideal status surpassed. Migration is a drastic and demanding way to improve one's status and it is adopted by teachers only after other strategies to this end have been exhausted. Weighed against existing theories of migration, the grounded theory contributes to understanding teacher migration and retention through the innovative use of the core category status.

## **KEY WORDS**

Factors; Grounded theory; Constructivist; Migration; South Africa; Teachers; Zimbabwe; Emigration; Education; Brain drain; Push and Pull; Narratives; Coding; Status; Illustrative model

## DEDICATION

I dedicate this thesis to the late “*Scorpion*,” Eliot Vuyo Dhlula, my god-father and mentor – because you believed in me, I now believe in myself.

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And to God be all the glory.

## LIST OF ABBREVIATIONS

AIDS	Acquired Immune Deficiency Syndrome
ANC	African National Congress
B.Ed.	Bachelor in Education
CID	Criminal Investigation Department
CTRP	Commonwealth Teacher Recruitment Protocol
ESAP	Economic Structural Adjustment Programme
GNP	Gross National Product
GNU	Government of National Unity
HIV	Human Immuno Virus
ICT	Information and Communication Technology
IMF	International Monetary Fund
LDC	Least Developed Countries
MDG	Millennium Development Goals
OBE	Outcomes-Based Education
PF-ZAPU	Patriotic Front: Zimbabwe African People's Union
PTUZ	Progressive Teachers Union of Zimbabwe
SADC	Southern African Development Community
SAMS	Southern African Migration System
STERP	Short Term Economic Recovery Programme
TEBA	The Employment Bureau of Africa
UNISA	University of South Africa
WB	World Bank
WENELA	Witwatersrand Native Labour Organisation
ZANU-PF	Zimbabwe African National Union: Patriotic Front
ZIMTA	Zimbabwe Teachers' Association
ZINTEC	Zimbabwe Integrated Teacher Education Course
ZOU	Zimbabwe Open University

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## CHAPTER 1

### INTRODUCTION, STATEMENT OF THE RESEARCH PROBLEM, AIMS AND RESEARCH DESIGN

#### 1.1 INTRODUCTION

Large scale migration is a contemporary phenomenon that is transforming the demographics of the workforce worldwide. Migration has been defined as the “more or less permanent movement of people across space” (Suarez-Orozco and Suarez-Orozco, 2005:96). To give a picture of how prevalent migration is worldwide, Suarez-Orozco and Suarez-Orozco (2005:96) state that there were approximately 185 million trans-national migrants at the turn of the 21<sup>st</sup> century. Morgan, Sives and Appleton (2005:226) cite statistics to show that by 2005 there were over 175 million people living in a country other than the country of their birth.

The phenomenon of the migration of people from one country to another is not new. Migration experts, such as Kristoff (1999:35) and Sjusen (2000:vii) argue that migration was more prevalent in the 19<sup>th</sup> century than it is now because there were less stringent requirements for movement from one country to another at that time. Kristoff (1999:35) states that labour is less mobile today than it was in the 19<sup>th</sup> century when 60 million Europeans moved to the Americas, Australia and elsewhere. However, Kock (2006:30) and Appleton, Sives and Appleton (2006:227) argue that rapid globalisation in the last few decades has resulted in increased volumes and complexity of movement between countries and regions. Miller, Ochs and Mulvaney (2008:90) cite statistics to show that the number of migrants in the world has more than doubled in the last 50 years and that by the year 2005 there were around 191 million migrants in the world. Due to globalisation, migration has also increased in the highly skilled labour force which includes health and education professionals (Morgan, et al. 2005:227). Migration is therefore an age-old global phenomenon that has influenced and continues to influence the development of all nations.

In contemporary society, globalisation forms an important backdrop for understanding migration and especially labour migration (Suarez-Orozco and Suarez-Orozco, 2005:96). Globalisation is defined by Bloom (2005:63) as the “integration of economies via the

movements of goods, capital, ideas and labour.” Therefore, in globalisation different national economies are incorporated into one system and free movement of resources, including labour, is essential in the making of global business. For Brown (2008: 285) globalisation can be perceived as the “deepening, widening and speeding up of the world wide interconnectedness” and interdependence. This implies that through globalisation the world becomes smaller and closer links between countries and regions of the world are established. The high level of globalisation that currently exists has come to mean that a shortage of labour in one part of the globe can be felt in the opposite part almost immediately. With the deepening of globalisation in the past few decades, the migration of labour has intensified and has come to affect every country of the world (Kock, 2006:30).

In an attempt to establish a clear relation between migration and globalisation, Suarez-Orozco and Suarez-Orozco (2005:96) present the following as ways in which globalisation affects migration:

- i) Labour tends to follow trans-national capital flows which are a major characteristic of globalisation and thus stimulate migration.
- ii) The new information and communication technology, which is at the heart of the current spate of globalisation, tends to stimulate migration by encouraging new cultural expectations, tastes, consumptions and practices whose satisfaction is usually only found elsewhere.
- iii) The availability and affordability of mass transportation is another characteristic of globalisation. This avails people with a variety of options for migration.
- iv) Deeply globalised countries have built their economies around the assumption of the availability of the “foreign” worker who is willing to do dull, dirty and dangerous work.
- v) Globalisation affects the development of economies differently, producing success stories in some and disasters in others, thereby creating conditions for migration by accentuating the migration gradient.

Other migration theorists (Dovlo, 2003; El-Khawas, 2004) advance the push and pull factor theory to explain the migration of workers. The movement of workers from one country to another or one region of the world to another is hardly ever attributed to a single factor. Certain socio-economic conditions are identified as being responsible for the migration of

workers from one part of the world to another. These are usually divided into two groups: the push factors and pull factors. Push factors refer to the hostile conditions within source countries that compel professionals and skilled workers to emigrate and seek employment in other countries (Dovlo, 2003:4). Pull factors are the attractive socio-economic conditions in receiving countries that draw professionals (El-Khawas, 2004:38-39).

The push factors that are commonly listed (El-Khawas, 2004:40; Dovlo, 2003:4) are:

- i) Low salaries;
- ii) Job scarcity;
- iii) Crime and conflict;
- iv) Political repression;
- v) Poor educational systems;
- vi) Poor conditions of service ;
- vii) Lack of progression within a career;
- viii) Lack of necessary technology and resources; and
- ix) Limited chances for self-advancement.

Most of these push factors fall within the economic sphere. Low salaries have been seen as main drivers of labour migration and these are closely related to the conditions of service. Workers want to progress in their line of work and any impediment to their progression is usually frustrating. Self-advancement through the acquisition of skills is another factor that workers consider.

Various pull factors, also mainly socio-economic in nature (Dovlo, 2003:5; El-Khawas, 2004:40) have been identified and they attract workers from sending countries to receiving ones. Key among these are the following:

- i) Higher salaries for the same jobs in the receiving countries;
- ii) Better conditions of service;
- iii) Advanced technology and availability of resources that make the work easier and safer;
- iv) Higher chance of professional and personal improvement;
- v) Greater environmental safety;

- vi) Higher standards of living; and
- vii) Less bureaucratic control.

Workers are seen by migration scholars as seeking better conditions for themselves by leaving countries with poor working and living conditions and moving towards those with better working conditions. Hence the workers are sometimes described as moving towards 'greener pastures.' El-Khawas (2004:40) views the out-migration of labour as subject to the disparities between sending and receiving countries in living conditions and employment opportunities. Dovlo (2003:5) goes further and describes the disparities that exist between the sending and receiving countries through various gradients. These are: the income gradient, job satisfaction gradient, organisational environment and career opportunity gradient, governance gradient, protection and risk gradient and the social security and benefits gradients. Thus, Dovlo (2003:5) explains the flow of skills from one country to another or one region to another through disparities in these indices.

## **1.2 TEACHER MIGRATION**

Teacher migration, together with other types of migration, dates back a long way. However, the current surge in the mass movement of teachers was triggered by a skills shortage in the politically and economically dominant countries in the northern hemisphere also referred to as the North. This current shortage of skills in the North began in the late 1980s and was caused by demographic changes (McGregor, 2006:6). The skills shortages especially in Western Europe were caused by a relatively large aging population which could not meet its own demands for labour (Campbell, 2007:117; El-Khawas, 2004:45). In education this was made worse by the fact that teaching was no longer seen as an attractive profession and so fewer and fewer young people were taking up education as a career (McGregor, 2006:6). The recruitment of teachers from the relatively poor and politically weak countries in the southern hemisphere (the South) by agencies to fill up vacancies in the North became significant in the mid-1990s and eventually reached its peak in 2001-2002 (De Villiers, 2007:69). This happened at a time when most countries in both the North and the South were seeking to fulfil the Millennium Development Goals (MDG) in education. MDGs refer to a set of poverty reduction targets that were adopted by countries in the United Nations in 2000. The goal in education is to ensure universal primary education for boys and girls and to eliminate gender disparity by the year 2015 (Pronk, 2004:9).

Countries in the North recruited teachers to such an extent that there was an uproar as education systems in the South failed to cope with the skills drain. Teachers were recruited right out of the classrooms and learners were left stranded as the education authorities could not react fast enough to replace them (Morgan, et al., 2005:229). Accusations of unethical poaching of teachers were made by source countries. In 2004 the Commonwealth Teacher Recruitment Protocol (CTRP) by Commonwealth countries was signed. The CTRP sought to balance the rights of teachers to emigrate with the need to protect national integrity and was an attempt to regularise teacher recruitment in signatory countries (De Villiers, 2007:70). Although the CTRP carries no legal force, it was still acknowledged by migration experts as the best practice in addressing teacher recruitment and it eased a lot of tension between sending and receiving countries and recruitment agencies (Degazon-Johnson, 2004:95).

### **1.2.1 Teacher migration: the case of Zimbabwe**

With regard to teacher migration from Africa, the following is pertinent: Sub-Saharan Africa (SSA) is the poorest region in the world as reflected by its Gross National Income (GNI) per capita of US \$490 compared to the United States (US), Canada and Western Europe which have a GNI per capita of US \$20 000 (Campbell, 2007:118). The brain drain has been a cause of concern in SSA since 1989 and has been fuelled by a number of factors including economic and political turmoil caused by corruption and dictatorial tendencies which combine to reduce many economies in the region into states of poverty (Campbell, 2007:118).

Economic collapse, political violence and a perception of rampant corruption were arguably at the heart of the three waves of migration that have hit Zimbabwe since its independence in 1980. The first wave occurred in the early 1980s with the ascendancy to power of the black government of Robert Mugabe and his ZANU-PF party. Initially it was just a small outflow of whites who were apprehensive about black rule in Zimbabwe (McGregor, 2006:4; Tevera, 2005:555). It is estimated that 50 000-60 000 whites left destined mainly for South Africa and Britain in that period (Pasura, 2006:3). In the mid-1980s, however, there was a hike as thousands of Ndebeles escaped from Zimbabwe to mainly Botswana and South Africa in an attempt to flee from the so called Gukurahundi atrocities through which the ZANU-PF government sought to break the backbone of the opposition party PF-ZAPU by killing an

estimated twenty thousand or more suspected supporters (Sibanda, 2005:258). ZANU-PF is a predominantly Shona-led party whilst PF-ZAPU had its power base among the Ndebeles (see 3.3.2). The second wave occurred in the late 1990s when professionals became disenchanted with the neo-liberal economic reforms, corruption and economic mismanagement and people left to seek better work prospects in neighbouring and overseas countries (Pasura, 2006:3). The third and current wave of out-migration began at the turn of the century. This is the largest wave of out-migration from Zimbabwe and is mainly driven by violent land redistribution, political instability, the active recruitment of professionals and general economic collapse within the country. The number of Zimbabweans thought to have left the country in the past ten years is estimated in millions with South Africa being a major destination. The Zimbabwean based Scientific and Industrial Research and Development Centre, SIRDC (2007) argued that in 2007 the number of Zimbabweans living in the diaspora was no less than half a million but the United Nations' through its Integrated Regional Information Networks; IRIN (2009:1) quoted a figure of 3 million for the same. However, by 2005 the flight of skills from Zimbabwe was already perceived as a "crippling socio-economic development challenge" (Tevera, 2005:1). Brown (2008:286) describes Zimbabwe as a "teacher labour-exporter par excellence of the current period."

The first decade of this century has seen a reversal of most of the post-independence gains that Zimbabwe attained in education since its independence. The country's education system has fallen from being one of the best in the region to being on the verge of total collapse with some schools closing as a result of acute teacher shortages, economic decline and political instability. Of all factors that have hit the Zimbabwean education system, none has been as devastating as the mass exodus of teachers to neighbouring and overseas countries. Of the 150 000 teachers that Zimbabwe needed at the beginning of 2009, only 75 000 were in schools and half of these were untrained (PTUZ, 2008:1).

Teacher shortage in Zimbabwe is not a new phenomenon, but what is new is the reason for the current shortage. Immediately after Zimbabwe's independence in 1980, the new nationalist government sought to fulfil the lofty promises it had made earlier as a liberation movement by expanding the education system to try and accommodate everyone who needed education (ZANU-PF Manifesto, 1980:12). The expansion saw the total number of pupils enrolled in the country rise from 819 586 at independence in 1980 to 2 147 898 in 1984 (Zvobgo, 1997:66). The sharp increase in enrolment resulted in an acute shortage of teachers.

The Zimbabwean government designed various measures to address the shortage of teachers. These include:

- The use of untrained secondary school graduates as teachers referred to as temporary teachers. By 1985, two thirds of the 14 718 teachers in the field were temporary teachers (Chivore, 1993).
- The recruitment of teachers from abroad, chiefly from Britain and Australia (Laming, 2008:1).
- The introduction of the *Zimbabwe Integrated Teacher Education Course* (ZINTEC) which produced 7 353 primary school teachers between 1981 and 1988. This was an initial and in-service teacher education programme which relied heavily on distance education principles and practices (Chivore, 1993:52; Zvobgo, 1997:66).
- The establishment of new teacher education colleges. In 1980 there were 8 colleges with an enrolment of 2 829 and by 1998 there were 15 colleges with approximately 19 000 students in total (Chivore, 1993:56; ZIMTA, 2008b:3.4).

By the year 2000, Zimbabwe had reduced the percentage of untrained teachers in the field to almost zero (Embassy of Zimbabwe, 2007:1; ZIMTA, 2008b:3.4) and was no longer making use of expatriate teachers. The few temporary teachers that remained in the system were mainly used as relief teachers. Zimbabwe looked set to achieve the millennium development goals in education and to attain its dream of universal primary school education.

Within a decade (2000-2009), however, Zimbabwe had relapsed to a situation where it effectively had only 25% of its requirements in terms of trained teachers. It once again found itself forced to rely on untrained teachers just as it had done almost thirty years before. Zimbabwe invested a lot of resources in the training of professionals with the hope of reaping some returns in the form of better service provision and an improved standard of living, but it lost these professionals, most of them in their prime, to other countries. Trying to replace them will be a lengthy and costly endeavour which any developing country would find difficult to achieve and one in the process of reconstruction like Zimbabwe will find even more difficult. The new Government of National Unity (GNU) in Zimbabwe has apparently resolved to lure back into the country the professionals who have emigrated, including teachers. The 2008 unity accord document signed by the leaders of three major political

groupings in Zimbabwe affirmed the need to bring back to Zimbabwe the migrant professionals so that they can participate in national reconstruction (Agreement between ZANU-PF and MDC Formations, 2008: 11).

Education is crucial in the reconstruction of any country. If Zimbabwe is to return to the high position that it once held in Southern Africa, it must both retain the teachers it still has and find ways to attract back the teachers and the other professionals that abandoned it. To achieve this it is necessary to first understand the complex matrix of factors that combined to create the massive drain of skills in education in the past decade and then speculate on the basic conditions that could reverse the drain.

Studies of worker migration in the region have been few and those undertaken so far have mainly dealt with migration at a macro level (Miller, Ochs and Mulvaney, 2008; Pasura, 2006; Campbell 2007; Manik, 2009). They have consequently usually failed to give voice to the key players, the migrants themselves. The migrant workers have been treated as passive respondents to external environmental conditions moving from one region to another seeking “greener pastures” and trying to escape harsh environmental conditions. However this study, which focuses on the Zimbabwean teachers who migrated to South Africa, attempts to give voice to the protagonists as it tries to reconstruct their definition of the situation that led them to their decision to migrate and construct a theory grounded on their experiences that explains their migration.

### **1.3 STATEMENT OF THE PROBLEM**

Against this background the main research question was formulated as follows: *What factors drive the migration of teachers from Zimbabwe to South Africa and how do these factors function within a grounded theory of teacher migration?*

The following sub-questions were used:

- i) What theoretical frameworks support the concepts of worker migration? How do macro-, meso- and micro- level theories of migration inform the migration debate with particular reference to teacher migration?

- ii) What historical, social, economic and political issues form the context within which teachers opt for migration, specifically those relevant to Zimbabwe?
- iii) What is the experience of a small sample of teacher migrants who moved from Zimbabwe to South African and how can a grounded theory of teacher migration be developed from this experience?
- iv) What recommendations for practice based on the findings of the literature review and the grounded theory inquiry on teacher migration in Zimbabwe can be made?

#### **1.4 AIMS AND OBJECTIVES OF THE STUDY**

The aim of the study is to uncover the factors that drive the migration of teachers from Zimbabwe to South Africa and to explain how these factors function within a grounded theory of teacher migration.

The main aim was sub-divided into the following objectives:

- i) To identify and discuss key theoretical frameworks which underpin the concept of worker migration; to explore how macro-, meso- and micro-level theories of migration inform the migration debate with particular reference to teacher migration.
- ii) To describe the historical, social, economic and political issues which form the context within which teachers opt for migration, particularly in Zimbabwe.
- iii) To explore the experience of a small sample of teacher migrants who have moved from Zimbabwe to South Africa and to develop a grounded theory of teacher migration based on this data.
- iv) To propose recommendations for practice based on the findings of the literature review and grounded theory inquiry on teacher migration in Zimbabwe.

#### **1.5 RESEARCH DESIGN**

The problem was investigated through a literature review and qualitative inquiry using a grounded theory approach. A summary of the research design is given in this section and a detailed exposition is presented in Chapter 4.

### **1.5.1 Literature review**

A literature study set the initial groundwork for the research. A good literature review establishes the research study in its historical and methodological context (Wellington, 2010:128). This means that through a literature study the researcher can establish the niche which the study will occupy and map clearly its boundaries and identify the gap of knowledge that the research seeks to fill. If done properly, it also establishes a link between the research questions and data analysis in any study (Wagner, 2010:37). In this case the literature reviewed included books, journals, relevant policy documents and legislation, and Internet-based sources.

#### **1.5.1.1 The role of a literature review in grounded theory research**

When doing a literature review in grounded theory research, Glaser (1998:68) advises against reading literature on the “substantive area under study” before embarking on the research. He maintains this is so that the researcher’s effort to discover emergent theory is not contaminated, constrained, inhibited or impeded in any way. He also says this will help the researcher to avoid irrelevant literature which does not pertain to the emergent theory. However, Glaser (1998:72) admits that there are cases where grounded theory researchers find themselves forced to do a pre-research literature review; doctoral research such as this study is one such instance. In such cases, Glaser (1998:72) advises that the review be treated as data collection “to be constantly compared as the review is done.” Charmaz (2006:166) maintains the aim is to use the review in such a way that it does not stifle the researcher’s creativity or strangle the theory. She further advises that where a grounded theorist finds himself/herself forced to do a pre-research literature review, he/she should do it and then let it lie fallow until categories and analytic relationships between them have been developed. Thereafter, the researcher should begin locating the work within the literature.

In this research most of the literature was reviewed prior to the research and Glaser’s (1998:72) advice was taken to treat the literature as problematic and as part of the data collection. In addition, the review was conducted at the beginning of the research process and was left to settle for over a year as Charmaz (2006:166) advises. During this time, the research design was developed and the data collection and initial coding and analysis of data were carried out. In the second coding stage of the research, as the categories began to

emerge and analytic links between them were being sought, it became necessary to revisit the literature review chapter. Additional reviews of new literature were then undertaken in the light of the findings in order to understand the findings further in terms of existing theoretical frameworks. In this way, the literature study was carried out according to the principles of grounded theory research.

### **1.5.2 Research approach and design**

The overall research approach used was qualitative. The qualitative approach was deemed appropriate as it focuses on the “quality of experience and actions as lived by persons” (Fischer, 2006: xv). The qualitative approach allows for different views of the theme of study by allowing participants a more open-ended way of expressing their views and demonstrating their actions (Henning, Van Rensburg and Smit, 2004:4). The qualitative approach therefore allows participants to freely express their opinions without being influenced by the researcher’s preconceived categories.

The qualitative research approach has several designs and the design that was found to match the task at hand was a grounded theory design. Grounded theory design was used as it seeks to derive an explanatory theory that grows out of the data. Grounded theory research design can be defined as a systematic qualitative research procedure that is used to build theory to explain a process, an action or an interaction and it is used when the existing theories cannot adequately explain the phenomenon under study (Ellis and Levy, 2009:328). In addition, a constructivist grounded theory research design (Charmaz, 2011) was adopted. This is a strand of grounded theory design that rejects the flowing earlier assumptions of grounded theorists: the possibility of an objective and authoritative observer, the existence of an external and objective reality, its treatment of data without acknowledging the participation and standpoint of the researcher in shaping the data (Charmaz, 2011:168). It endorses the existence of multiple realities and affirms that data in grounded theory research is mutually constructed by the researcher and the participants, and that neither the data nor its analysis is neutral but both reflect the positions, conditions and contingencies of their construction (Charmaz, 2011:131). My stance as researcher was interpretive but my analysis of teachers’ experiences of migration was a portrayal of reality not an exact picture. I recognised my position within the studied world and located myself within my research interest in teacher migration, theoretical perspectives in the field and broad qualitative practices (see 4.5.1). Moreover, my personal

position as a teacher who formerly migrated from employment in Zimbabwe to South Africa is acknowledged as well as the role this experience may have played in establishing a rapport with the participants and gaining insight into their world.

### **1.5.3 Sampling**

The qualitative research approach uses a variety of sampling techniques and the choice is determined by the purpose (Bamberger, 2000:10). Henning et al. (2004:5) argue that the selection of participants in a qualitative study should aim to identify relevant people who can provide rich data.

Theoretical sampling, which is a sampling method characteristic of grounded theory, was used in this research. In theoretical sampling, the aim of the researcher is to develop the properties of his or her developing categories or theory and based on this he or she seeks people, events or information to illuminate and define the boundaries and relevance of the categories (Charmaz, 2006:189). This type of sampling has been described as “theory driven” because each data collection phase is informed by previous data analysis (Birks and Mills, 2011:69). The data rich participants that were identified were former Zimbabwean teachers who have been in South Africa for no more than five years and resident for at least one year. These teachers held a teaching qualification (degree or diploma) that qualified them to teach in South Africa. Thirteen teachers (N=13) participated in the study and of these, six were female.

### **1.5.4 Data generation and collection**

Grounded theory uses a wide range of methods for data generation and collection, many of which it shares with other qualitative designs. In this design, two methods of data generation and gathering were used during two phases of the research. During the first phase participants could choose to either write their life history down or participate in life history interviews.

- 1) **Written life histories:** The participants were asked to write an account of their life history as it relates to the experience of their migration from Zimbabwe to South Africa. Three participants chose this option.

- 2) Interviews: Loosely structured, individual interviews using an interview guide were used to solicit the life histories of the remaining ten participants as it related to the experience of their migration from Zimbabwe to South Africa.

During the second phase of the research, a second round of individual interviews were held with all participants to verify, clarify and expand on issues raised in the written and oral life histories. Interviews were conducted in venues of the participant's preference and were audio-recorded. Thereafter, verbatim transcriptions of the recordings were made.

### **1.5.5 Data analysis, presentation and discussion**

Data analysis in grounded theory is unique in that it is done concurrently with the data collection and informs sampling. This is opposed to other forms of qualitative analysis where data is analysed only after the collection is complete (Corbin and Strauss, 1990:420). Data analysis in this research proceeded through coding (see 4.4.4). Three coding steps were used in this research and were named initial, intermediate and advanced coding steps. In the initial coding step, line by line coding was used to fracture the data and name the processes and actions in each line of the interview transcript or written biography. The intermediate coding step was about restructuring the data into categories or themes of basic information identified in the data by the researcher. In the advanced coding step the grounded theory was produced through theoretical integration in which the core category was integrated with other categories and sub-categories by establishing theoretical links between these categories.

The presentation of the findings (see Chapter 5) was structured as follows: A synopsis of the grounded theory (see 5.2); a description of the core category and the sub-categories using an illustrative model (see 5.3); an exposition of the other categories which are in the form of processes; and a general discussion of the grounded theory generated, including its positioning within migration and sociological theoretical frameworks (see 5.4).

### **1.5.6 Ethical considerations**

Ubuntu philosophy provided the guiding principle in the ethical stand taken in this study (see 4.6). Participation in the research was based on informed consent granted by the signing of a consent form. Consent could be withdrawn at any stage of the research. The data collected

was treated as confidential and anonymity of participants was granted through the use of pseudonyms for both their names and for the names of their institutions. The data was used only for the purposes of this research and the results were disseminated as a thesis and research paper. There were no known or anticipated risks to participants. Participants were informed that they could request a summary of the research after the thesis has been successfully examined.

### **1.5.7 Trustworthiness of data**

Four measures of trustworthiness of data were used in this research, namely credibility, originality, resonance and usefulness. These measures were adapted from Charmaz's (2006:182) criteria for the evaluation of grounded theory research. Credibility was granted through strict adherence to the iterative method of data collection, theoretical sampling and analysis which has an in-built measure to ensure that the theory generated is derived inductively from the data collected. My familiarity with the settings and the topic also ensured credibility. Originality was adhered to in the sense that this research attempted to extend the understanding of the migration of teachers from Zimbabwe particularly as very little research has been done in this area. Resonance was secured through the use of *in vivo* codes. These are codes that are generated from the words and expressions used by the participants and they help preserve the participant's meaning and understanding of actions. The usefulness of the research is guaranteed because this study seeks to generate an explanatory theory of the migration of Zimbabwean teachers to South Africa. This could be of use to human resource planning in the education systems of both Zimbabwe and South Africa and could serve as a basis for the analysis of the migration of experts in other sectors.

In addition to these four criteria, the study further benefited from expert review as it was done under the supervision of an experienced promoter who acted as an auditor for all research processes.

## **1.6 LIMITATIONS OF THE STUDY**

Although my position as a former Zimbabwean teacher now resident in South Africa and my role as a *bona fide* postgraduate student at the University of South Africa afforded me easy access to rich data sources, it could have introduced some level of preconception and bias in

the research findings. However, no pretence is made at the neutrality of the researcher in the constructivist grounded theory where the researcher is merely required to face and account for his/her biases, a thing I do in paragraph 4.3.5. Furthermore, as a qualitative study, generalisation of the findings is not possible. Most of the literature for this study was reviewed prior to the empirical study. In the grounded theory research design, the reviewing of literature before embarking on the empirical investigation is said to introduce contamination and impediments in the discovery of an emergent theory (see 1.5.1.1), however this weakness was minimised by letting the literature lie fallow for some time and by treating the literature simply as data through constant comparison as it is reviewed.

## **1.7 DEFINITION OF KEY TERMS**

The following key terms used in the study are clarified below.

### **i) Migration**

Migration is the movement of a group of people from one region to another. In the context of this study it is the movement of workers from one country to another country for the explicit purpose of seeking employment (Roberts, 2009:150).

### **ii) Brain-drain**

This is the loss of skills suffered by the source country due to the out-migration of professionals and the resultant negative socio-economic effects of such a loss (De Villiers, 2007:68).

### **iii) Pull factors and push factors**

Pull factors are those socio-economic conditions in receiving countries that migrating professionals find attractive (El-Khawas, 2004:40).

Push factors refer to those hostile conditions within the country that compels professionals and skilled persons to leave their home country and seek work in other countries (El-Khawas, 2004:40).

## **1.8 ORGANISATION OF THE THESIS**

Chapter 1 is an introductory chapter which introduces the problem, its background and statement. The research questions, aims and objectives of the study are also provided.

Chapter 2 summarises the theoretical underpinnings of the study. The concepts of migration and globalisation are discussed. Macro-, meso- and micro-level theories of migration which inform this study are examined and an outline of the migration-remittances debate is made.

Chapter 3 discusses the contextual and historical issues in the migration of teachers worldwide, in Africa and in particular from Zimbabwe to South Africa. It seeks to expose the factors that drive the migration of teachers and determine the direction of migration.

Chapter 4 outlines the research methodology, research approach and design. Justifications for the use of the selected design are provided. The ethical considerations adhered to in the research and the issue of trustworthiness of results are discussed.

Chapter 5 presents the results of the research. The grounded theory is presented and the core category and its sub-categories and processes are described and discussed. An attempt is made to locate the results in the contemporary migration theory.

Chapter 6 offers a summary of the study, conclusions are drawn and recommendations made.

## **1.9 SUMMARY**

The intensification of globalisation in the past few decades has brought with it an increase in the volume and diversity of migration. Of late the migration of skilled workers, including teachers and nurses, has become prevalent in almost all countries of the world (Kock, 2006:31). Sub-Saharan Africa in particular has lost many professionals due to this phenomenon but its situation has been exacerbated by poverty, economic and political turmoil, corruption and dictatorial governance (Campbell, 2007:116). Zimbabwe is one of these sub-Saharan African countries and between 2000 and 2009 it lost an estimated 75% of its teacher requirement, mainly due to migration. Most of its teachers migrated to South Africa and Britain. It is with this in mind that an introduction and background to the problem

is provided and the objective of coming up with a theory grounded in research which explains the migration of teachers from Zimbabwe to South Africa is stated. The research design is also briefly discussed.

The next chapter discusses the theoretical framework for worker migration.

## **CHAPTER 2**

### **THEORETICAL PERSPECTIVES WHICH INFORM ON WORKER MIGRATION**

#### **2.1 INTRODUCTION**

In Chapter 1 an introduction to the problem, the problem statement, aims and research design were presented. In this chapter a review of theoretical perspectives that inform the understanding of migration and especially worker migration is made. The chapter begins with a discussion of the definition and typology of migration and is followed by an analysis of globalisation, causes of migration and selected theories of migration. The theories of migration discussed are grouped under the following subheadings: macro-level theories, meso-level theories and micro-level theories. The gender perspective on migration is presented, thereafter the main points of the migration-remittances debate are outlined.

The area of migration studies is deeply fragmented into competing disciplines which most of the time do not share any information, point of view or theory. Several experts in migration studies have lamented the fact that there is no unifying paradigm from which the different disciplines can approach the study of migration (Brettell, 2008:114). Even wider is the divide between the social scientists that take a “macro” approach and examine migration through policies, market forces and other large socio-economic units and those who adopt a bottom up, micro approach and use the individual migrant or the migrant’s family as the unit of the study (Brettell and Hollifield, 2008:2). This examination of the theoretical perspectives that inform migration is therefore coloured by the underlying fragmentations in the studies of migration and also by my personal inclination towards sociology and anthropology. A strong framework for understanding teacher migration is sought to offer a comprehensive explanation of the phenomenon of teacher migration. Therefore, an examination of micro-, meso- and macro-theories is made. Furthermore, more and more scholars now acknowledge the gendered nature of the migration process, and the need to reflect this in migration research and in migration policy formulation and implementation. Therefore, a gender perspective of migration is also included in this chapter.

## 2.2 MIGRATION: DEFINITION AND TYPOLOGY

The word migration comes from the Latin word *migrare* which means to change residence. However in migration literature, the transversal of space over a given period of time is often emphasised in the definition of migration. A good example is the definition by Suarez-Orozco and Suarez-Orozco (2005:96) who state that migration is the “more or less permanent movement of people across space.” Migration is therefore the translocation of a person or persons from one place to another for a given time period. Harzig, Hoerder and Gabaccia (2009:89) however offer a more sociological definition when they say migration is a “move from one society to another.” Such a consideration brings to the fore the fact that cultural adjustments have to be made by the migrant to adapt to the new society that they end up in after migration. The cultural adjustments may include the learning of a new language and norms or even adjusting to a new diet.

Migration experts have come to realise that even after moving from one country to another the migrant usually maintains links with their homeland and may move back and forth between national borders. They are therefore not completely uprooted from their homeland nor are they firmly planted in the destination country (Brettell, 2008:120). This has led to a view of migration as a process linking together countries of origin and destination. In this view migration becomes the process of the migrant’s simultaneous engagement in the country of origin and destination. Because migrants maintain multiple relations that are familial, social economic, political and religious among others that span borders, migrant settlement cannot be considered as a break with home but as the simultaneous engagement in countries of origin, transit and destination (Sorensen, Van Hear and Engberg-Pedersen 2002:19).

The typology of migration is greatly varied since, as Jordan and Duvell (2003:62) affirm, migration is “... not a single phenomenon with one central essence and causal explanation, but there are as many different kinds of migration as there are ways of sedentary life...” and the migrants themselves have varied characteristics, motives and behaviours. The many forms of migration are however related and different forms and may rise and fall in prominence over time (Martell, 2010:105). The different prominent types of migration are examined in the ensuing discussion.

Writers on migration usually distinguish between forced or involuntary migration and voluntary migration. In the cases where people have to move for reasons beyond their control, as in the movement of refugees and exiles and any other people who depart under political, ethnic, gender or other forms of persecution, the migration is termed forced migration, whilst movement of people for economic and other reasons that are not beyond their control is termed voluntary (Akokpari, 2001:3). Forced migrants also include victims of human trafficking, slaves, people escaping natural or man-made disaster and those moved due to developmental projects (Martell, 2010:106). This is one of the prominent type migrations in Africa because of the incessant war and strife that ravages the continent (El Khawas, 2004:41). Sorensen et al. (2002:9) stress that there is a very fine line between voluntary and forced migration:

*What begins as an economic migration may transmute into internally displaced or international refugee movements and conversely refugee movements may overtime develop into other forms of movement.*

The distinction between refugees (forced migrants) and economic refugees (voluntary migrants) is not helped by the well documented fact that most conflict ridden countries are often those with severe economic challenges. Migration flows from countries that are experiencing conflict and severe economic challenges usually create confusion when it comes to deciding whether they are economically motivated or simply by the need to survive.

Internal and international migration is another distinction that is usually made in migration literature. Internal migration is the movement of people within the territory of their own country and may encompass urban-rural migration, internal displacement of people due to a catastrophe or internal refugees. International migration is cross-border or external migration. Solomon (2003:4) maintains that many of the internal migrants in the world currently are victims of strife.

The time that a migrant spends away from his/her home country or society is used to distinguish between permanent and temporary migration, and long term, short term and seasonal migration. Temporary migrants include those who go to places for a brief period of time to earn income and then return to their homeland. They usually include international students, tourists and business people (Martell, 2010:107). Permanent migration raises issues

of citizenship and the changing of identity. In Africa, anthropologists have identified some migrants as weekly commuters, seasonal migrants and circular migrants (Brettell, 2008:115). Africans have migrated seasonally to work on farms and in towns and mines both within and outside the borders of their country.

Return migration is normally seen as a natural last leg in the migration cycle in which, having saved enough capital and gained skills abroad, the migrant returns to the homeland (Sorensen, et al., 2002:19). There are, however a number of migrants that return without the skills or capital but in frustration after having failed to adapt to life abroad. Family ties rather than economic factors are seen as more lucrative incentives for migrants to return home. Migrants might feel they have to go home and assist their relatives or community or might be recalled by their family (Brettell, 2008:115).

Labour migration is distinguished from other forms of migration as it is the migration of workers instead of people whose intention is not that of securing jobs in some distant labour market. Martell (2010:107) maintains labour migration involves people looking for work or better economic conditions or those recruited and says it is the most restricted form of migration. However, Berthelemy (2005:170) argues that the globalisation of the labour market has accelerated the migration of highly educated workers. Labour migration is sometimes split into skilled and non-skilled labour migration where any person with some training or education above secondary level is considered skilled (Campbell, 2007:11). Labour restrictions in different countries are generally tighter for the unskilled labourer than for the skilled counterpart (Mooney and Evans, 2007:166). It is this type of migration that is at the centre of the migration-remittances debate because the loss of workers is perceived as a loss of human capital for the source country and hence given the name “brain drain” but the worker remits resources back to the homeland which in the opinion of certain experts recoups the loss.

A distinction is made between regular and irregular migrants. Governments are the ones that define what legal or illegal migration. Consequently there are as many different definitions as there are governments (Martell, 2010:105). Jordan and Duvell (2003:78) view irregular immigrants as those people who may be denied access to residence and work in a given country but find illegitimate ways to gain entry anyway. Boyd (2006:5), focussing on the US and Canada offers the following categories of irregular migrants:

- i) Those who enter the country legally with valid documentation but violate the terms of their admission;
- ii) Those who enter the country legally, for example through border posts, but possess fraudulent documentation; and
- iii) Those who enter the country illegally, for example without formal documents, or come into the country clandestinely.

Regular or legal migrants are those that gain entry, residence and work in a foreign country through legitimate means.

The general direction of the people moving from one hemisphere of the earth to another also provides another distinction in the type of migration. Solomon (2003:2) highlights the East-West, South-North, North-South and South-South as the main types of migration and states that the South-South movement, which is a movement of people between the poor countries of the South, is the most prominent.

Chain or sequential migration is the movement of people that is based on networks (Harzig et al., 2009:79). Networks are connections maintained by the migrant with both their communities of origin and their new communities of migrants. In chain or sequential migration previous migrants send back information, knowledge and resources to would-be migrants to assist them with the migration costs (Harzig et al., 2009:79). McKenzie (2006:124) explains that friends and relatives with previous migration experience may assist the new migrants by providing shelter and assistance on arrival and by arranging a job. Therefore, in chain migration, migrant friends and relatives use their resources and connections to make the migration and integration of new migrants easier.

### **2.3 GLOBALISATION**

Because globalisation forms an important context within which migration is often examined in research and literature and because writers on migration treat globalisation as both a cause for and explanation of migration, it is imperative that it is examined in adequate detail at this juncture.

### **2.3.1 The concept of globalisation**

Globalisation connotes the process of “making global,” of bringing to the “world stage” and of universalisation (Aiyedun, 2004:19). Various issues are universalised from time to time, for example issues of democracy, human rights, environment and values. Standards might get thrust on to the world stage through politics, information technology, consumption or through some other means (Aiyedun, 2004:19). In such instances, though we talk about the globalisation, it is the globalisation of an individual issue and we refer to its exposure to the whole world through various tools like information and communication media. However, the word globalisation has come to have another meaning that is beyond this one. It has evolved to mean a process and an era in which the world has become a “global village” characterised by the mediated interaction of people irrespective of the distance between them through the use of technology. It is this latter notion of globalisation that I seek to examine.

There is no agreement in literature about the concrete content, cause and consequences of the process of globalisation and this obviously makes defining it problematic (Kock, 2006:27). Sjursen (2000: vii) notes that it is difficult to capture the essence of globalisation and states that it is usually an attempt to outline its scope. Although most writers limit the scope of their definitions of globalisation to the economic, El-Ojeili and Hayden (2006:12) correctly note that different writers often choose to emphasise different aspects of globalisation in their definitions. For example, whilst some may emphasise the economic, others may emphasise the time-space compression aspects or choose to concentrate on the political or cultural interdependence of nations.

I examine two typical economic definitions of globalisation: The one offered by Bloom (2005:3) maintains that globalisation refers to “the integration of economies through the movement of goods, capital, ideas and labour.” The other one is by Oyejide (2002:15) and states that “globalisation is the increase of the flows of trade in goods and services, and flows of other factors of production like capital (human and technological) and labour between countries.” The linking of national economies to produce one global economy through the increased movement of capital, goods and services and the subsequent economic interdependence of nations is emphasised in the above economic definitions of globalisation.

A definition that emphasises the time-space compression effect of globalisation and the interdependence of nations is offered by Brown (2008:285) when he defines globalisation as the “deepening, widening and speeding up of the world wide interconnectedness” and interdependence. In this definition globalisation is perceived as the gradual shrinking of the world as closer and closer links are established between countries and regions of the world. The popular view that globalisation has turned the world into a ‘global village’ is an apt expression of the time-space compression since it conjures up the image of people from all over the world interacting in real time as if they were in the same village.

Kock’s (2006:28) definition and characterisation of globalisation emphasises the political integration and interdependence caused by globalisation. He further states that those who reside in globalised societies live in reciprocal dependence of one another. He goes on to give the following as characteristics of globalisation:

- i) Increased cross-border interaction;
- ii) The economic and political action that loses its territorial character, and extends across national borders; and
- iii) An increase in social consciousness of the interdependence of nations.

Kock’s (2006:28) characterisation of globalisation emphasises that globalisation can also be seen to include political integration and interdependence and a marked increase in awareness of the citizens that their nations depend on each other economically, politically and culturally. The increased cross-border interaction, for example, requires the harmonisation of tariff structures between nations and hence the harmonisation of import and export policies. Nations can no longer act unilaterally with most of their policy decision as these decisions usually have a global impact (Wangwe and Musonda, 2002:57).

However, there are writers who view globalisation as all-encompassing and attempt to give a holistic definition of globalisation. El-Ojeili and Hayden (2006:13) state that an open and general definition is more useful than a narrow one in any detailed discussion of globalisation. Shivji (2002:101), for example, views globalisation as a revolution that is affecting every individual on the globe and is “invading every nook and cranny of the globe” and has economical, ecological, normative and psychological dimensions. Economically he sees globalisation as the intensification of the links between national economies into a single

global economy. Shivji (2002:102) maintains, from an ecological point of departure, that globalisation is seen in the rapid depletion of natural reserves, planetary climate change, global epidemics and reduced biodiversity. Normatively, it manifests itself as the expansion of worldwide standards, common scales of measurements, universal human rights and the world wide solidarity of the under privileged. Psychologically he argues that globalisation is perceived as an increasing consciousness that the world is a single space and this perception is reinforced by common cultural elements like music, dress, diet, *etc.*

For the purposes of this research, I prefer a holistic definition of globalisation that emphasises that globalisation has various facets and reflects the interdependence of nations in all aspects of life. Thus, I opt for a definition that views globalisation as the result and process of integration of national economies and cultures, governance and technology into one through the reduction of influence of time and space by the use of technology. The definition must also acknowledge that globalisation can be used as a theory that attempts to explain the relations between nations and regions and accounts for the psychological perception that the earth is becoming increasingly smaller and more and more interconnected.

### **2.3.2 Outcomes of globalisation**

Globalisation has had mixed results so far; it has produced ‘winners and losers.’ The winners are those countries that supposedly read the signs of development and adjusted accordingly so as to take advantage of the process. Those that failed to integrate themselves into this global movement and have remained isolated and unable to tap into the global market have become the losers (Wangwe and Musonda, 2002:57). Countries that have been termed winners are those that have gained in economic growth and human advancement through the rapid movement of goods, service, capital, technology and labour. These countries also gained in increased foreign investment, expanding media, internet connections and technology transfer. The gains in culture have been in the public awareness of human rights through improved access to information via radio, television, phones and the internet (Jansen, Mwapachu and Semboja, 2002:4). The losers have to some or other extent failed in the above areas.

Globalisation has produced significant gains globally; however these have been concentrated in a few countries leaving the majority to share the costs. According to Wangwe and Musonda (2002:61) and Ogbu (2004:37) these are:

- i) the reinforcement of income gaps between nations;
- ii) the widening of the technological gap between developed and developing nations;
- iii) the widening of the knowledge gap between skilled and unskilled workers which results in the widening of the income gap between the formal and informal sectors of the economy ;
- iv) the squeezing out of the informal sector by the formal sector; and
- v) the displacement of local and indigenous companies by multinational companies in poor countries resulting in them closing down.

Globalisation seems to widen the differences in material possessions that already exist between countries and between nationals of the same country. Investments by big multinational companies apparently results in the ruining of indigenous companies and the informal business sector. In many poor countries these support a large portion of the population and this is said to be one way through which globalisation induces people to migrate.

Countries in Africa have mainly been the losers in the process of globalisation. The following reasons are given by Jansen, Mwapachu and Semboja (2002:3): Firstly, whilst unskilled labour remains immobile due to barriers imposed by industrialised governments, skilled labour has flowed from poor African countries to rich industrialised ones. Rich countries have thus been able to produce more high-value goods and offer better services than poor countries as they have skilled labour. On the other hand, technological transfers to poor countries have been hampered by the lack of skilled labour and this has produced a further gap in the productivity and earnings of rich and poor countries. Secondly, high transaction costs associated with poor infrastructure, the location of landlocked countries, underdeveloped financial banking systems, low technology, inadequate skills, corruption and bureaucracy amongst other things have meant that African countries cannot fully benefit from globalisation. Thirdly, African countries have produced less than adequate exportable commodities and have thus not enjoyed the share that they deserve in the global product market (Wangwe and Musonda, 2002:57; Jansen et al, 2002:1-9).

### **2.3.3 Contending discourses in globalisation**

Globalisation is usually placed within two contending discourses; the dominant neo-liberal discourse and the critical discourse (Shivji, 2002:102). The philosophy of the dominant discourse is neo-liberal, that is, it is based in the belief of a free market where market forces are allowed to reign unfettered by government interventions (Mohammed, 2004:55). The market is seen as the “best and most efficient” distributor of resources and regulator of the economy while the state’s role becomes that of creating an “enabling environment and maintaining law and order” (Shivji, 2002:103). Within the dominant discourse globalisation is seen as offering opportunities and challenges and all countries are urged to strive to take advantage of these since globalisation is inevitable and is here to stay. “Globalise or be globalised!” is the rallying call (Shivji, 2002:103).

The critical discourse on globalisation is not homogeneous, but it is a loose amalgamation of thoughts whose unifying element is an emphasis on the extreme polarisation, inequalities and in-equities that globalisation has caused and continues to cause. It highlights the destruction of livelihoods and the ecosystem, and the increasing income inequality between nations and individuals created by globalisation (Shivji, 2002:104). The radical political economic analysts within this thought argue that globalisation is part of the same historic process of accumulation of capital on a global scale which creates a concentration of capital on one hand and poverty on the other Shivji (2002:104). Mohammed (2004) and Alanana (2004) go further and argue that globalisation is nothing but a stage of capitalism that accentuates the concentration of capital in the hands of very few people and of corporations at global level who eventually control production, exchange and distribution at will. Alanana (2004:44) alleges that globalisation is the universalisation of capitalism and its values. These thinkers also lament the reduction of the States’ powers, sometimes to levels that are way below those of individual corporations, resulting in a situation where states eventually are reduced to serving the corporations (Shivji, 2002:105). I concur with El Ojeili and Hayden (2006:12) who maintain that critical theory provides a good framework for examining the potential for emancipation and oppression in the globalised world.

Those African writers who have embraced the critical perspective (e.g. Shivji, 2002:104; Alanana, 2004:45; Mlama, 2002:120) have used it to argue that globalisation is the same process of exploitation as slavery, colonialism and neo-colonialism was. Alanana (2004:45)

maintains that slavery and colonisation were the fore-runners of globalisation and Africa's failure to take advantage of globalisation is happening because of the lack of development in the countries and this is the result of the many decades of exploitation that the continent has suffered at the hands of the rich capitalist countries of the North during the time of slavery, colonialism and neo-colonialism. In slavery and colonialism the industrialised countries used pillage to exploit African countries; in colonisation African countries were incorporated into the international capitalist system as suppliers of raw materials and as markets for finished goods from industrialised capitalist countries; and in globalisation the weakening of the state and capital flight, the brain drain and the unequal exchange in the commodities market are the tools of exploitation (Mloma, 2002:121). The unequal exchange refers to a situation where the industrialised countries buy raw materials cheaply from the less developed countries especially African countries but sell finished products to them exorbitantly.

## **2.4 CAUSES OF MIGRATION**

Skeldon (1997:4) observes that to ask why people migrate is to assume that movement is anomalous and that sedentary life is the norm. Yet it is rare for anyone to spend his/her entire life without ever venturing out of their village or ward and the most serious punishment that most societies impose on their members is to restrict movement through imprisonment. For Skeldon (1997:4) a more logical question to ask in this situation is "Why do people not migrate?" However, because of the volumes and impact that migration has, scholars have not been deterred from investigating the causes of migration by such arguments.

### **2.4.1 Globalisation as a cause of migration**

Globalisation has been accused of being both the trigger for and facilitator of migration and especially labour migration. A useful analysis of this is provided by Suarez-Orozco and Suarez-Orozco (2005:96) who attempt to establish a clear relation between migration and globalisation. They present the following as ways in which globalisation interacts with migration:

- Globalisation affects the development of economies differently producing success stories in some, and disasters in others, hence creating conditions for migration by accentuating the migration gradient.

- The new information and communication technology, which is at the heart of the current spate of globalisation, tends to stimulate migration by encouraging new cultural expectations, tastes, consumptions and practices whose satisfaction is usually only found elsewhere.
- The availability and affordability of mass transportation is another characteristic of globalisation. This avails people with a variety of options for migration.
- Deeply globalised countries have built their economies around the assumption of the availability of the “foreign” worker who is willing to do dull, dirty and dangerous work.
- Labour tends to follow trans-national capital flows which are a major characteristic of globalisation and thus stimulate migration.

The fact that globalisation bestows success on some countries and disaster on others is well documented (Shivji, 2002:104; Wangwe and Musonda, 2002:61; Ogbu, 2004:37) and has been alluded to above. Countries in the South and especially those in Africa, have failed to take advantage of the process of globalisation but have been left to bear the brunt of the negative effects of globalisation which include the destruction of local industries and local livelihoods, a weakened state that is unable to meet the social needs of its citizens, capital flight, loss of skilled manpower, polarisation due to a widening income gap in the population, cultural confusion, ecological degradation and environmental disasters (Shivji, 2002:104). The success stories in countries located mainly in the North on the other hand, tell of gains in economic growth, human advancement indices and in public awareness of human rights and democracy (Jansen, Mwapachu and Semboja 2002:4). By increasing the disparities that exist in living and working conditions between countries, a greatly steepened migration gradient is created resulting in a potential for huge migration flows.

New information and communication technology (ICT) is at the heart of globalisation and is seen by some experts as the defining feature of the current economic system (El-Ojeili and Hayden 2006:60). The ICTs have shaped the values, tastes and consumption patterns of millions of people worldwide. In Africa (and among the critical thinkers) globalisation has been accused of cultural imperialism by spreading Eurocentric social and economic values through the use of satellite broadcasts and internet and mobile phones (Alanana, 2004:44; Mlama, 2004:122). After exposure to these foreign values, African youths develop foreign tastes and consumption patterns and usually seek fulfilment by migrating to regions where

these newly acquired tastes can be satisfied (Mlama, 2002:121). It is through the same ITCs that migrants can now easily access information about destination countries regarding their rules of entry, residence and differentials in income and opportunities (Weiner, 1995:25).

Globalisation has introduced an affordable and fast means of transport and so availed people who want to migrate with several safe options of travel. Referring to the ease of travel in the contemporary phase of globalisation Martin and Taylor (2001:102) talk of a “transport revolution” in which the cost of travel has decreased tremendously and the convenience increased geometrically. El-Ojeili and Hayden (2006:61) also note that there has been a steady decline in the cost of transport with the evolution of globalisation since the mid-1800s.

Dull, dirty and dangerous work in many countries is reserved for migrants. This type of work is on the main monotonous and mechanical and is done under the least favourable conditions and migrant workers are usually the only workers prepared to do this work as their primary concern is to merely enter the labour market and such jobs often offer them a foot in the door (Harzig et al., 2009:77). Suarez-Orozco and Suarez-Orozco (2005:96) explain that migrant workers are usually perceived as more reliable, flexible, punctual and willing to work over time, and the recruiting agencies find them apparently easier to recruit and deliver to employers. In truth the migrant worker is usually easier to manipulate and exploit than the native worker because the migrant might not have the union protection that native workers enjoy. Trimikliniotis, Gordon and Zondo (2008:1329) have argued that migrant workers are found in large numbers in certain sectors of South Africa’s labour because they are easier to exploit than native workers who have various unions and political parties guarding against exploitation.

Capital and especially finance tends to flow rapidly around the globalised world, and the technology exists to make this possible. Labour as part of that capital must also move with the other forms of capital. However, this can only be done within certain restrictions. The fact that the movement of labour is not as free as that of other forms of capital is well documented (Mooney and Evans, 2007:166). It is the skilled component of labour that is usually allowed to be mobile. Serious restrictions are placed on the migration of the unskilled component of labour through the immigration policies of countries and these policies “only encourage certain types of migrants based on employability, financial means, language means and

cultural capital in general” (Mooney and Evans, 2007:166). It is therefore an erroneous assumption to think that all capital is equally free to move around the world.

#### **2.4.2 Other causes of migration**

Although Weiner (1995:25) agrees with Suarez-Orozco and Suarez-Orozco (2005:96) that migration is to a large extent the result of globalisation, he clarifies that migration is sometimes the result of state policies that are meant to directly or indirectly induce migration in order to pursue political, economic or foreign policy objectives. Weiner (1995:29) explains that forced migration has been used by some governments as a way of ethnic or racial cleansing to achieve cultural homogeneity or ethnic dominance especially in post-colonial states whose boundaries were drawn with little or no attention to the nations and ethnic groups residing in them. Focussing on Africa, Nkamleu and Fox (2006:31) note that the borders imposed on the continent by the western powers in 1884 were never taken seriously as they were considered artificial by Africans, however in the post-colonial period with the rise in importance of citizenship, the borders became a source of conflict. Africa’s borders were drawn without attention to the ethnic groups that inhabited the continent and sometimes split the ethnic groups into different countries and with the rise in the political importance of citizenship linked to the privileges such as voting and access to land led to ethnic cleansing. To achieve this, certain African countries resorted to policies that encourage emigration of specific ethnic groups in order to attain ethnic homogeneity within the country.

Forced migration has also been used to rid certain countries of perceived political dissidents and to further foreign policy objectives through population dumping, that is the forcing or encouraging of a large part of a country’s population to migrate to another country in such a way that it destabilises it. Population dumping has also been used by some countries as foreign policy tool to force other countries to take certain political or economic decisions favourable to the former (Weiner, 1995:29).

Weiner (1995:33) also argues that some countries, especially those in the Third World, often encourage their populations to migrate in order to ease unemployment, especially when there is a brain overflow and also to ease the pressure of social welfare responsibilities. Brain overflow refers to a situation where a country has over-invested in its manpower through

education and skills acquisition and eventually fails to absorb all the manpower in its labour market.

Less developed countries may also encourage migration in order to benefit from the remittances as these have become a factor of development in a number of countries and relieve the governments of certain responsibilities (Tullao and Rivera, 2008:39). Remittances have an impact at personal, community and national levels. At community levels remittances have been channelled to improve education, health and recreational infrastructure and thus take some pressure off municipal authorities, and at a national level they have been used to improve roads, education, land productivity, and the maintenance of buildings and other things (Adepoju, 2010:16). Remittances of migrant workers form a significant part of the GNP of countries like Burkina Faso, Lesotho and Eritrea (Adepoju, 2010:16).

The low population growth rates in the industrialised countries of the North coupled with the unmatched high rates of economic growth generate employment demands in those countries and encourage migration (Campbell, 2007:117 and El-Khawas, 2004:45). For example, in 2003 Papademetriou (2003:49) estimated that one third of the population growth of developed countries was made of international migrants. The industrialised countries that have a low population growth now have to rely on imported labour to keep a reasonable dependence ratio, which is the ratio of workers to retirees. This ratio has become disproportionate due to the decreased entries into the labour market and increased longevity of retirees. Rich countries need immigrants to cope with prevailing economic and demographic imperatives: the unskilled to do the dull, dirty and dangerous work that the locals shun and the highly skilled professionals like engineers, doctors and nurses who are locally in short supply (Adepoju, 2010:16).

War and strife have generated a large percentage of the worldwide migration stock. Barclay (2010:53) notes that the number of refugees was 79 000 in 1960, increased in the ensuing year to peak at 6.4 million in 1995 and decreased gradually to just over 3 million in 2005. The merging of studies of forced and voluntary migration comes in the wake of the realisation that there is a thin line between refugees escaping strife in their homeland and economic refugees who seek to avoid the adverse effects of economic collapse. Countries with great strife also usually suffer serious economic problems and many times the migration flows from these countries are at the same time motivated by strife and economic hardship,

making it difficult to classify the migrants as refugees or economic migrants (Sorensen et al., 2002:9).

It is the deep structural imbalances in the level of economic, social and political development that underlie the global patterns of migration (GFMD, 2009:2). The relative availability of jobs, education, health care security and political stability act as pull or push factors in migration. It is the search for economic prosperity and the need to ensure survival of self and of close relatives that spurs people to migrate.

## **2.5 MIGRATION THEORIES**

Scholars have sought to understand the causes, effects and dynamics of migration for a long time and in the process generated a wide spectrum of theories. However, these theories are unfortunately compartmentalised into several disciplines that enjoy very little interaction (Brettell, 2008:114). The disciplines that study migration are amongst others anthropology, history, demography, economics, geography, law, political science and sociology. Some of the more salient of the theories from the different disciplines are reviewed in this section.

### **2.5.1 Macro-level theories**

#### **2.5.1.1 The Historic Structural approach**

The historic structural approach is based on the neo-marxist theory known as the world systems theory which was credited to analyse the global economic system made by Immanuel Wallerstein in 1974 (Wallerstein, 1974). Mooney and Evans (2007:166) explained that the contemporary world economic system is capitalist and is characterised by an unfair division of labour that produces unequal exchange relations between different geographical regions of the world. The world economic system is divided into three main geographical areas: The core, the semi-periphery and the periphery. The core is composed of economically and culturally dominant and industrialised countries that buy raw materials from the other countries (the semi-periphery and periphery countries) at low prices and then sell back finished products to the same countries at higher prices (Mooney and Evans, 2007:166). The semi-periphery is a group of countries that are exploited by the core but they in turn exploit the countries of the periphery in the same way that they themselves are exploited by the core.

The economic prosperity of countries in the core and semi-periphery is therefore achieved at the expense of those in the periphery.

The world systems perspective is a useful framework for a global approach to understanding the economics of migration (Harzig et al., 2009:74). The historic structural approach is a macro approach that seeks to understand migration through the world systems perspective and postulates that migration is induced by the penetration of capital and investment into the periphery. These investments dislocate peripheral communities and spark international migration towards the core (Harzig et al., 2009:74). Investment in poorer regions disrupts local livelihoods and squeezes out indigenous corporations in preference of multinational ones, and also develops tastes in the native population that can only be satisfied elsewhere. In this way it induces migration (Ogbu, 2004:37). The unequal terms of trade between the core and the periphery creates push factors in the periphery and pull factors in the centre which induces people from the periphery to migrate towards the core in order to try and improve the quality of their lives.

Critics of the historical structural approach accuse it of being too macro in approach and of ignoring the personal in the same way that the world systems theory does. In theory they say the individual is reduced to a passive respondent with no decision-making potential yet it is the individual that makes the conscious decision to emigrate (Brettell, 2008:120).

#### 2.5.1.2 Push and pull factor theory

The push and pull factor theory is a neoclassic economic theory with modernisation theory undertones which migration theorist usually apply in an attempt to understand the decisions of both internal and international migrants. The neoclassic economic theory emphasises the economic factor in migration as it views migration as an economic phenomenon in which migrants weigh the cost and returns of current and future employment opportunities (Nkamleu and Fox, 2006:5).

In its simplest form, the push and pull factor theory postulates that less developed economies with their low salaries and poor standards of living push away workers, whilst higher wages and better standards of living in the more industrialised regions pull them in (Harzig, et al., 2009:62). The migration of people from a region with low demands for labour and low wages

to one with a high demand for labour and high wages is supposed to eventually equalise the wages and living conditions between the sending and receiving regions and hence such migration is beneficial to both the sending and receiving regions (Weiner, 1995:39; Nkamleu and Fox, 2006:5). When workers migrate out of any given region this reduces the labour supply in the local labour market and increases its value resulting in higher wages, therefore the out-migration of workers from a region is viewed as a beneficial thing for those left behind as it results in an increase in local wages.

The push and pull factor theory has been criticised for being too simplistic and not taking all the factors that migrants consider when they migrate by only concentrating on the economics. It has, therefore, been modified to include a number of added pull and push factors.

Push factors (also referred to as supply factors) are the hostile conditions within source countries or regions that compel professionals and skilled workers to emigrate and seek employment elsewhere (Dovlo, 2003:4). The push factors identified in literature include: low salaries, job scarcity, crime and conflict, political repression, poor educational system, poor conditions of service, lack of progression within a career, lack of necessary technology and resources and limited chances of self-advancement (El-Khawas, 2004:40; Dovlo, 2003:4). Papademetriou (2003:39) identifies the roots of the push factors in the quest of an individual to protect self and family from sustained physical danger and the need to escape drastic and chronic declines in economic opportunities.

Pull factors or demand factors are the attractive socio-economic conditions in destination countries or regions that draw professionals (El-Khawas, 2004:40). The following are identified in literature as pull factors: higher salaries for the same jobs in the receiving countries, better conditions of services, advanced technology and availability of resources that make work easier and safer in the receiving regions, higher chances of professional and personal improvement, greater safety of environment, higher standards of living, and reduced bureaucratic control (El-Khawas, 2004:40). The root of the pull factors lie in the search for economic improvement and are radically different from that of the push factors which lie in self-preservation (Papademetriou, 2003:39).

The disparities in living conditions and in conditions of service that exist between the sending and the receiving countries are at times described by Dovlo (2003:5) as a migration gradient

giving the impression that the greater these disparities are, the bigger the flow of migration they will produce. However, migration experts have noted that this is not always the case. Differences in income and living conditions do not always result in migration; in fact disparities in economic and living conditions exist all the time between countries but do not result in migration most of the time. Martin and Taylor (2001:102) explain that the push and the pull factors are like “battery poles, without a link between them they produce no migration.” In this manner they express the fact that push and pull factors are necessary but not sufficient conditions for migration, it is facilitators that complete the circuit. The absence of facilitators explains a situation where push and/or pull factors may exist but fail to trigger any migration flows or widen existing ones. Various facilitating factors are discussed in migration literature and are discussed next.

Migration networks form an important facilitating factor in international migration. Networks encompass everything that enables people to learn about opportunities abroad and take advantage of them (Martin and Taylor, 2001:102). The main components of a network are friends and family members abroad who can provide the would-be migrant with credible information about job prospects, finances for a trip, and often shelter on arrival. Labour brokers, smugglers, and the church from time to time play a crucial role in the migration and placement of individuals and therefore form part of the migration network. Networks have been greatly strengthened by the rapid development of communication and transport technology witnessed in the contemporary globalisation era and by the changes in human rights practices that have made it easy for migrants to avoid deportation once they arrive in their destination country (Martin and Taylor, 2001:102).

The presence of a long term political, social and economic relations between sending and destination countries form a facilitating factor in international migration (Papademetriou, 2003:41). This is usually the case between former colonies and their former metropolises that have enjoyed a long economic and social relationship and it explains the volume migration between these two points. It is not surprising that Brown (2008:300) maintains that much of the migration occurring in the world today is between neighbouring countries as neighbouring countries invariably have a long term political social and economic relationship.

Papademetriou (2003:41) also mentions that substantial economic benefits from migration to motivate economic elites in receiving country and their political allies to organise themselves in support of significant flows constitutes another facilitating factor. The presence of key constituencies in destination countries like religious and human rights groups who oppose in principle the circumstances that the migrants are trying to escape are also factors to be considered.

Critics of the push and pull factor theory observe that the equalisation of socio-economic conditions between sending and receiving economies has not occurred instead the migration from sending countries has provoked even more migration. Even the remittances that were supposed to be part of the equalisation are not usually invested in the economic development of sending nations instead they have been used to buy luxuries and fuel consumerism and hence create migration dependent communities (Brettell, 2008:119). In sociological and anthropological studies the push and pull factor theory has lost a lot of support but is still used to account for factors that influence migration.

## **2.5.2 Meso-level theories**

### **2.5.2.1 Transnationalism**

Transnationalism is a concept and theory that has attracted interdisciplinary interest (Heisler, 2008:95). It has become a lens through which migrants are viewed and is sometimes seen as a unit of analysis in migration studies. Transnationalism comes from a realisation by migration experts that migrants maintain links with their homeland and may move back and forth between national borders and across different cultures and social systems and are therefore neither uprooted from their source country nor are they moored in any state (Brettell, 2008:120). For Hooper (2007:54) the concept of transnationalism reflects the dislocation of issues from the national. It highlights the decreasing importance of the state in global interactions and identities. Heisler (2008:95) on the other hand maintains that transnationalism refers to the process by which migrants maintain, build and reinforce multiple linkages with their country of origin reaching beyond the source and destination country and giving rise to a transnational community. A transnational community is a system of networks, institutions and relations that connect people in source and host countries, including those who are not migrants in dense, long lasting and stable ties based on solidarity,

shared ideas, beliefs and symbols (Heisler, 2008:96). Brettell (2008:120) considers the study of transnationalism as a point of intersection between diaspora studies and migration studies. Heisler (2008:96) maintains that the diaspora is actually an important building block for a transnational community.

Diaspora refers to a community of people who have left their place of origin (through voluntary or forced migration) and yet maintain identification with their homeland through the maintenance of language cultural and religious practices, through endogenous marriages or some other way (Mooney and Evans, 2007:67). This community could be made up of a number of groups in various societies or in different political territories that are linked to one another and to the place of origin (Harzig et al., 2009:82). Diaspora communities are seen as a hybrid between the host society and the society of origin and the people in these communities live transnational and transcultural lives. The concept of transculturalism reflects the migrant's experiences as they live simultaneously between the aspects of two or more cultures and their ability to create a new space that allows the interaction of the original and the destination spaces. They reflect the emotional ties between family members in two or more cultural spaces (Harzig et al., 2009:83). The people in the diasporas maintain and practice their cultures in a space that can no longer be linked to a given territory.

Whilst some authorities stress the link between the community of migrants and their homeland as vital in the definition of a diasporic community, others say it is the belief of its members that they will never be fully integrated into the host communities and their desire to one day return to the homeland that is crucial in defining them as a diaspora (Mooney and Evans, 2007:67).

The link between members of the diasporic communities and their relatives in the homeland creates a network that can sustain migration flows. Friends and family members abroad can provide vital information about job opportunities, entry and residence requirement, they may also finance the trip and assist with placements (Martin and Taylor, 2001:98). The diasporic community can also assist new immigrants with the initial integration and can even facilitate illegal immigration (Papademetriou, 2003:41).

### 2.5.2.2 The Ethnic Enclave Economy model

The ethnic enclave economy model is based on the dual labour market theory and seeks to explain why migrants are found in huge numbers in certain sectors of the economy. The dual labour market theory posits that the labour market is segmented and hierarchal but can be divided into two large sectors: the primary sector and the secondary sector. The primary sector is where the most favourable and stable jobs with optimum working conditions, high salaries and good prospects of promotion can be found but are the preserve of a country's native population (Harzig et al., 2009:77). The Secondary sector on the other hand is highly competitive, does not have the pleasant working conditions of the primary sector and is characterised by low salaries for the often dangerous jobs on offer. The jobs on offer in the secondary sector are usually done by the migrants in the country. The segmentation of the labour market is according to the task and skills required and it prevents groups defined by gender, race or recent arrival from gaining access to better jobs. Linguistic skills, technical know-how and seniority are some of the barriers against access to higher level jobs. Migrants often accept jobs in the secondary because their initial concern is usually the mere entry into the job market and the jobs offer them just that (Harzig et al., 2009:77).

However, some migrants might find employment in the ethnic enclave economy safe compared to the tribulations of the secondary sector. Heisler (2008:87) offers a detailed description of how the ethnic enclave works: The ethnic enclave economy is characterised by a spatial concentration of immigrant groups giving a clustered network of businesses owned by group members. Initially ethnic businesses serve co-ethnics but may expand to include the whole community. The ethnic enclave offers the new migrant a safe haven for learning the language, on-job training and an alternative route for social mobility and is thus an alternative to the formal labour market.

### 2.5.3 Micro-level theories

#### 2.5.3.1 Family Economy theory

This section discusses an approach that seeks to integrate macro and micro elements and uses the family as a unit of analysis. Family economy approach to understanding migration allows for the interaction of the micro and macro elements (Bretell 2008). Harzig et al. (2009:75)

maintains that the approach developed from women and gender studies has values as it permits the inclusion of non-measurable factors such as emotional and spiritual factors in the analysis of the migration decision of individuals. Family economy is said to encompass both the income generation capacity of the family and its income allocation strategies for the purpose of covering the family's economic and social cost. The allocation of duties and the allocation of income within families is an engendered issue that depends on the cultural norms of the society although in general it follows the patriarchal relations that are typical of most societies today. The process of generating the family income involves the allocation of useful resources to certain family members and may involve the diversification to guard against losses. Sending a family member or family members to work abroad in anticipation of remittances that could boost the family's income is one diversification strategy families employ to guard against losses (Harzig et al., 2009:76).

#### **2.5.4 The gender perspective on migration**

The fact that migration is a gendered process in all aspects of its cycle is now well accepted and stems from the acknowledgement that migration flows are composed of an already significant but still decreased percentage of women and girls. Nkamleu and Fox (2006:35) note that in 1960 the percentage of women involved in migration was 41% by the year 2000 it had risen to 47%. They cite the following as the traditional constraints to women's involvement in migration:

- i) the laws and cultural norms limiting access to their education, land, credit, productive inputs, information and health care; and
- ii) the low literacy rates compared with men.

The patriarchal norms that dominate most societies limit women's access to education, information and various other services and by so doing narrow their opportunity to seek migration opportunities.

Nkamleu and Fox (2006:35) attribute the growth in the volume of migration of women to the following factors:

- i) women fit easily into informal sectors like domestic work, small trade and the sex industry even though they have less access to the formal sectors;
- ii) native born women are out working in large numbers which opens the gap for migrant women to fill as child and elder carer and housekeeper; and
- iii) there is an increase in the number of professional women that have migrated.

Informal sectors in destination countries absorb a high percentage of migrant workers because they have a lower entry requirement than the formal sectors and therefore women's access to these sectors provides an advantage and spurs their migration. More women in the industrialised countries are entering the formal job market leaving the traditional tasks for women to be occupied by migrant women. The traditional source countries of the global south have of late also been producing professional women who have migrated in numbers.

Donato, Gabaccia, Holdaway, Manalansan IV, and Pessar (2006:3) say that many migration scholars acknowledge migration as a gendered phenomenon that requires more sophisticated theoretical and analytical tools than the studies of sex roles and sex as a dichotomous variable allow. Boyd (2006:1) advocates for a perspective that provides insight into the gendered nature of migration and of the experiences of women in all aspects of migration and which is not limited to the mere collection of data on males and females. To achieve that Boyd (2006:1) proposes that the perspective should amongst other things answer the following questions:

- i) How do norms, social relationships and hierarchies associated with being male and female affect the potential for migration and experiences of migration for both men and women?
- ii) How do gender inequalities in destination countries affect the experiences of migrant men and women?
- iii) To what extent and in what way does migration benefit or disadvantage women and men?
- iv) What steps must be taken to ensure equal opportunities and outcomes for migrant men and women?

In answering these questions the gender perspective moves from the exclusive analysis of families, households and women's lives to national and international issues of migration.

Scholars use the perspective to analyse gender in the lives of both male and female migrants in politics and governance of migration, in work places of migrants, in state policies, towards migrants and foreign born populations in the diasporas and in the capitalist system as a whole (Donato et al., 2006:6).

That the field of migration studies is fragmented into several disciplines with no unifying perspective has already been alluded to above and some experts have registered regret on this state of affairs. However the use of gender perspective in the numerous disciplines that are involved in studying migration has allowed scholars in the different disciplines to create and nurture interdisciplinary dialogue about key and common questions in migration studies (Donato et al., 2006:6).

## **2.6 BRAIN DRAIN-REMITTANCES DEBATE**

Migration scholars in the poor countries of the South realise that these countries have borne the brunt of loss of skills and expertise through out-migration yet they invest a sizeable percentage of their GNP in the skill development. They often argue that out-migration has more negative effects than positive ones. From the point of view of education as a human capital investment they argue that the out-migration of professionals and skilled persons constitutes a loss of investment made by the source country. The loss of skills, talent and investment made in human resources by the source country has come to be termed brain drain. However Dodoo, Takyi and Mann (2006:155) lament the lack of agreement on what constitutes brain drain but say that in general it means “the developing country’s loss of human capital to more developed countries.” Implicit in this definition is the assumption that human capital flows from the less developed countries to the more developed ones and that as workers leave they take with them skill and capacities. De Villiers (2007:68) on the other hand maintains that brain-drain occurs when a country loses its talented and skilled labour force and also loses its ability to replenish it. Thus he extends the meaning of the brain drain to cover not just the loss of human capital but also the resultant negative socio-economic effects of the loss.

The negative impacts of out-migration on the source countries that have come to be identified as brain drain as cited by Brown (2008:286), El-Khawas (2004:41) and Dovlo (2003:5) are summarised:

- i) Loss of returns on human capital investment.
- ii) Loss of revenue from taxes.
- iii) Loss of the source country's development potential due to the loss of skills.
- iv) Family disintegration, especially when spouses are separated.
- v) Increase in juvenile delinquency where children are left on their own as parents migrate.
- vi) The fuelling of further migration through chain migration.

The loss of returns on human capital investment is usually considered in migration literature as the main loss that developing countries suffer as a result of brain drain. Human capital is the repertoire of skills, knowledge, ability and capacity possessed by a person usually obtained through education, on job training and experience (Mooney and Evans, 2007:124). Governments usually invest substantial percentages of the countries GNP to develop human capital and therefore stand to lose when skilled personnel emigrates.

Other losses that sending countries may suffer include a reduction of tax base for the source country's government and this adversely affects the dependence rate of the source country. The workers who migrate are usually the young, energetic, innovative and skilled ones and thus take with them the development potential of the source country. Migration is often blamed for social disintegration as families are torn apart and this is seen as leading to a rise in incidents of delinquency and divorce amongst other social ills. That migration begets migration, is a well-documented fact in migration studies and this is usually based on the observation that the migration of one person makes the migration of the next one easier; hence migration is accused of fuelling further migration (Martin and Taylor, 2001:102; Tullao and Rivera, 2008:39).

Migration experts in the countries of the North which are seen as having gained human capital from the global worker migration have put forward a counter argument to the view of experts from the South. Their counter argument is that the remittances that migrant workers send to source countries are enough to offset the losses that source countries incur due to out-migration (El Khawas, 2004:42). They also mention other positive effects of out-migration on the source countries. These are:

- i) the lowering of the unemployment rate;
- ii) the release of political pressure; and
- iii) the improvement of the working conditions and salaries of the workers who remain in the source country as the demand for their skills increases.

To elaborate on these points raised we note that most of the times migrants do send remittances to their source countries and remittances have become an important source of income to some countries. However, it is debatable whether those remittances do or can offset losses due to the migration of skills. Therefore the argument that the remittances made by migrant workers can offset the losses in human capital suffered by sending countries has proved difficult to confirm or disprove; worse, it is difficult to accurately quantify the remittances of migrant workers for a number of reasons (Dodoo, et al., 2006:157). To begin with, experts cannot agree upon an operational definition of a migrant let alone that of remittances and therefore cannot provide an agreed-upon measure of the remittances made by any group of migrants (Dodoo et al., 2006:156). The amount of remittance made is usually understated because only the remittances made through the official means are captured yet some of the remittances are made through non-official or even illegal channels. Even if it were possible to measure remittances, the losses that a country, society or community suffer through brain drain would also be difficult to quantify as it is not possible to follow and quantify all the negative ramifications of worker emigration.

It is true that the unemployment rate of any country is lowered with the exit of workers from the country. It is plausible therefore that out-migration can be a solution to the problem of unemployment in a country where it exists. At times due to ill-adjusted education systems, some countries may train more personnel than they need resulting in what is described as brain overflow (Tullao and Rivera, 2008:39) and out-migration in such instances can be one way to solve the problem of brain overflow. It is possible that out-migration can at times release political pressure, for example when unemployed and discontented workers emigrate. Thinkers using the push and pull factor theory argue that out-migration of workers from a country with low salaries and poor working conditions can actually stimulate an improvement in salaries and working conditions as the country fights to retain the workers left behind (Dovlo, 2003:5). Practically, however, this has not always been the case, especially with government employees. When workers leave government employment they are usually not replaced promptly or not replaced at all and their work load is distributed among the

remaining workers thus overburdening them and causing them to think about migrating. Consequently the working conditions actually deteriorate instead of improve.

## **2.7 MANAGING MIGRATION**

Migration is an age-old phenomenon that has affected human society for time immemorial, yet no society seems capable of effectively managing it (Papademetriou, 2003:39). Large scale migration has been on the agenda of international meetings for quite some time now because it exposes society's "sense of identity and exposes the weaknesses of its social and economic governance as well as its capacity to enforce its own laws" (Papademetriou, 2003:39). Migration exposes the society's short comings especially the inequalities in living conditions as these are what usually trigger migration. Migration apparently tends to expose the weaknesses in socio-economic organisation that politicians are keen to hide from ordinary people.

How are different societies handling migration? For most industrialised countries in the North, the challenge is to restrict immigration from the South and to do that they have put up restrictive policies to curb the influx of people into their countries. On this Jordan and Duvell (2003:78) warn that punitive policies on immigration only fuel irregular immigration and feed human trafficking. People who cannot enter the country legally due to stringent immigration policies usually resort to illegal means of entry and may fall victim to human traffickers. Sorensen et al. (2002:13) argue that managing migration requires an understanding of why people migrate in the first place and the migration policies that countries put in place should offer solutions to the migration pressures which are predominantly located in the source countries. Targeting the migrants without offering a solution to the objective conditions that cause them to migrate would be like treating the symptoms and not the disease. Hence, Sorensen et al. (2002:13) emphasize that policies curbing immigration should create a situation in which migration is not the only means of survival for the people in sending countries.

Source countries obviously face the migration problem differently. Theirs is to try and deal with the mass exodus of people and the resultant negative socio-economic effects. The efforts of these countries have been directed at one or more of the following (Sorensen et al., 2002:15):

- i) encouraging or discouraging the emigration of their citizens;
- ii) encouraging return migration; and
- iii) encouraging the migrants' continued participation in local development through remittances and other means.

Poor sending countries might directly or indirectly encourage their citizens to migrate especially to the highly industrialised countries in the North. Remittances of migrants have of late become a significant contributor to many a poor country's GNP and Sorensen et al.; (2002:19) note that remittances of migrant workers surpassed the International Development Assistance that the less developed countries received from the developed countries at the turn of the century.

There are times however when the sending countries attempt to put in place policies to curb out-migration. Informed by the principle that loss of skilled workers is loss of human capital they put up policies that restrict the out-migration of workers. Adepoju (2010:39) argues that no amount of remittance can make up for the loss of skilled workers as they usually take with them development potential, creativity, energy, determination and entrepreneurship, not to mention the loss in potential tax collection and human capital investment loss. The development potential becomes the gain of the destination country. What is worse, remittances can also be used to fuel further migration perpetuating the haemorrhage of a source country's skills base.

The poor source countries have at times sent out signals that encourage return migration. The idea being that the returning citizen will come back with the much needed skill and financial capital to contribute to the development of the poor country. However migration experts are not all agreed that the return of migrants has developmental benefits for the source country. Sorensen et al. (2002:19) argue that most of the returnees are those who failed to adapt to life in a foreign land and usually return with very little gain in financial or human capital. They further argue that the skills that the workers gain abroad in industrialised countries are usually inapplicable in the less developed source countries. The returnees who come back after a long stint abroad and who have saved substantially for their return usually have better developmental prospects.

Governments of source countries are usually keen to maintain a relationship with their citizens in the diaspora so as to ensure their continued participation in local development and maintain an opening to milk as much economic and political advantage from them as possible. According to Adepoju (2010:15) many African migrants do not intend to stay in the diaspora forever are keen to maintain ties with their home communities. They have the potential to assist in the development of their homeland. To maintain links with its people in the diaspora governments might provide them with several services such as dual citizenship rights, the right to vote in national elections, representation in legislature and the provision of services for the undocumented migrants abroad (Sorensen et al., 2002:19).

In conclusion, Papademetriou (2003:39) advises migration policy makers to understand:

- i) the factors that cause substantial migration events, those that merely mediate them and the levers that can be pulled to produce a favourable outcome;
- ii) the reasons why some people react to certain events by migrating and others even under the worst conditions stay put;
- iii) the role played by people organised into smuggling syndicates in the growth of unwanted migration and says they should be willing to deal with them; and
- iv) that migration ties sending, transit, receiving countries, migrants and their families and employers in an intricate web where unilateralism which excludes any part of this web will suffer limitations.

In conclusion, many factors trigger migration and some of these have been discussed above. Some are manmade as in the case of political violence and war, others are natural as in the case of natural disasters. Various conditions mediate in migration, for example the existence of migration networks and the recruitment of workers. This research has attempted to understand factors that have caused the migration of teachers and the mediating factors in this migration flow. It is true that some people will react by migrating where others will stay put, or that the same people might choose to migrate at a different time but under the same conditions that they were living before. Policy makers would invest their time wisely if they sought to understand why.

There has been a marked increase in the people-smuggling syndicate worldwide and this has been accompanied by an increase in academic interest on the topic. These people-smuggling

syndicates contribute to the growth of irregular migration and in their worst form they become rings of human traffickers involved in modern day slavery. Boyd (2006:6), acknowledging that the number of people trafficked is difficult to establish, quotes estimates of between 600 000 to 800 000 as the number of people sold into slavery, forced into prostitution or forced marriages annually. Trafficking of people is a highly gendered, illegal form of migration with 80% of those trafficked being women and girls. There is a need therefore for policy makers to understand and recognise the role of these syndicates in irregular migration as they draft policies to minimise their sphere of influence.

Unilateralism or multilateralism that excludes the sending countries as partners has limited effectiveness since most migration pressures that cause significant flows are found in the sending countries (Adepoju, 2010:38). Receiving countries are sometimes involved in desperate attempts to curb immigration and do this without involving the whole web of migration, believing erroneously that migration can be turned on and off like a water tap.

It is the receiving countries that often initiate and sponsor return migration; sending countries are usually not keen to do this, possibly because they find it more profitable to receive remittances than to receive returnees.

## **2.8 SUMMARY**

Migration, the key concept in this study was examined in this chapter. Migration is a multifaceted phenomenon that has attracted the attention of many scholars in varied disciplines like anthropology, economics, history, political science and sociology. A huge volume of theory has been generated on migration but most of it is compartmentalised in the various disciplines and only a small fraction of it was discussed in this chapter. This included globalisation as a cause of migration, selected theories of migration and approaches to dealing with migration. An important and on-going debate in migration theory is about whether migration is beneficial to source countries and regions or not. The debate introduced in this chapter discussed the issue of remittances send back to the source country.

Chapter Three looks at global teacher migration and focuses on teacher migration in Africa, with special reference to contextual issues influencing the migration of teachers from Zimbabwe to South Africa.

### **CHAPTER 3**

## **CONTEXTUAL FACTORS AFFECTING THE MIGRATION OF TEACHERS FROM ZIMBABWE TO SOUTH AFRICA**

### **3.1 INTRODUCTION**

In the previous chapter the theoretical framework that informs the research was outlined. Various theories of migration which fall under micro-, meso- and macro- perspectives were discussed. These included: the historical structural development theory, the push and pull factor theory, transnationalism, the ethnic enclave economic model and the family economies theory. The gender theory of migration was analysed and the main tenets of the migration-remittances debate were outlined.

This chapter deals specifically with the contextual factors which influence the migration of teachers from Zimbabwe to South Africa. Firstly, the global context of teacher migration is discussed, thereafter the regional and finally the Zimbabwe-South Africa teacher migration context is discussed. An interrogation of the global and local factors that drive the migration of teachers from Zimbabwe to South Africa is at the core of this chapter.

### **3.2 THE GLOBAL TEACHER MIGRATION PHENOMENON**

As mentioned, migration is an age old, global phenomenon affecting every country in the world and has become an important feature of the socio-economic, cultural and political lives of a significant number of people worldwide today (Barclay, 2010:46). Labour migration involves people moving in search of employment, or in search of better returns for their labour or moving simply because they have been being recruited (Martell, 2010:107). This type of migration is also very pervasive and affects every country in the world as either a sending, receiving or transit country and is not a new phenomenon either (De Villiers, 2007:67). Literature identifies the driving force behind labour migration as being mainly economic and places it in the professionals' quest for maximum returns on their skills and labour (see 2.5.1.2).

Labour is usually classified as skilled or unskilled. Although experts sometimes vary on the cut-off point between unskilled and skilled labour, on average they agree that for a person to

be considered skilled in a certain profession they must have attained training at tertiary level in their field of expertise (Campbell, 2007:11). The movement of labour from one country to another is seen as a crucial component of the functioning of the global economy even though the flow of the less skilled component of labour is still highly restricted worldwide (Mooney and Evans, 2007:166). However, globalisation has made labour migration and migration in general much easier than it was in the past through the provision of cheaper and faster modes of transport and through easier access to information as a result of improved technology (El-Ojeili and Hayden, 2006:61).

Economic and labour migrants constitute 85% of the estimated 215 million migrants worldwide today (ZIMSTAT and IOM, 2010:17). This type of migration has attracted a lot of attention and generated debate in literature probably because of the drastic effects that it has on both sending and receiving countries. Brain drain, the loss of skills suffered by a country due to the emigration of its skilled personnel, is cited as the major negative impact of labour migration on the source country (De Villiers, 2007:68). Other negative impacts of that constitute brain drain are the reduced tax revenue base and the social disintegration of families. Brain drain has been blamed for the continued underdevelopment of source countries where most of them are already in the category of Least Developed Countries (LDC) (Weiner 1995:41). What source countries lose in skills and development potential is gained by the destination countries. However, migration experts agree that source countries do enjoy some measure of repayment for the human resources lost and this is through remittance and skills transfer. The disagreement which has sparked an on-going debate is whether the source countries actually recoup their losses through remittance or not. Put in other words, the question is whether the source countries benefit from migration as much as the sending countries (see 2.6).

The adoption of the United Nations Millennium Development Goals (MDG) by countries worldwide was an affirmation by those countries of their commitment to the development of their people (Pronk, 2004:9). The recognition by the signatory countries of the need to meet the second MDG is an affirmation of the role of education in poverty alleviation, promotion of peace and security and the protection of the environment (Laming, 2008:1). However the adoption of the second MDG, which sets developmental goals in education, has meant that the demand for teachers in the international labour market was greatly increased. The industrialised countries of the global North are in a better position to compete for and attract

more and better teachers because of their economic clout than their less developed counterparts in the South. This further threatens the attainment of this goal in the South as it compounds the teacher shortage (Miller, Ochs and Mulvaney, 2008:90).

However, certain recent changes in the international labour market dynamics have resulted in fewer teachers being trained and this exacerbates the teacher supply problem. Paterson and Arends (2009:13), analysing literature on teacher retention and employment patterns, conclude that in the decades leading to the millennium there were changes in the international labour markets which resulted in fewer teachers being trained. They argue that the phenomenal growth of the service sector which now requires a higher skills base has resulted in the alteration of career choice patterns and this has affected the social groups from which teachers traditionally came. In other words, the labour market has widened and it has drawn away potential teachers to other jobs, especially those in the service sector. They cite examples that show that women and other traditionally marginalised groups in the US and in South Africa achieved upward social mobility through being teachers, however other avenues have since opened in the labour market for these groups and some members are taking them up and thus reducing the stock of teachers.

The rise in serial careers, that is, a situation where people move from one career to the next is a reality and the decision of what career to pursue in life is no longer a once-off decision. Individuals go through various careers in their lifetime and this has reduced the lifespan of a trained teacher in the classroom (Paterson and Arends, 2009:13). Teaching for many is no longer a lifelong career but one of several that a person may pursue in their life. The pursuance of serial careers means that teacher training no longer has the same returns for the country as it did before because of the reduced mean time that a teacher stays in the profession and this has increased the pressure in the teacher labour market.

The increased demands for higher skills in the service sector labour market has translated into a demand for good education and hence into a demand for good teachers. The adoption of the MDG by countries, changes in the international labour market and the rise in the demand for higher skills in the globalised economy has fuelled the competition for teachers in the global labour market.

Teacher migration is a phenomenon as old as the teaching profession itself. Brown and Schulze (2007:2) classify teacher migration as labour migration and acknowledge it as part of the global labour movement affecting all countries developing and developed. This phenomenon is driven by differences in the supply of teachers from one region of the globe to another (De Villiers, 2007:7). Brown and Schulze (2007:2) argue that although teacher migration is driven by mainly economic pull and push factors, there are community and school related factors that might motivate teachers to move. Among these they identify:

- i) the characteristics of schools in the home country; and
- ii) community characteristics such as infrastructure and climate.

Teachers will obviously be drawn away from poorly resourced or poorly managed schools and be drawn to those with better resources and better management. Migrant teachers are also likely to behave the same since labour migration is about people looking for better conditions (Martell, 2010:107). Migrant teachers are also likely to consider general environmental features such as infrastructure, service provision and the political atmosphere. The erosion of the teacher's status in many African communities due to low remuneration and as in the case of Zimbabwe, through political victimisation have been cited by teachers' unions as fuelling teacher migration (ZIMTA, 2008a).

It is the flow of teachers from the relatively poor countries of the South to those of the North that has attracted the attention of many writers on migration and led to the adoption of the Commonwealth Teacher Recruitment Protocol (CTRP) in the Commonwealth countries in 2004. The CTRP is a non-binding agreement that seeks to ensure ethical and sustainable recruitment of teachers that does not disrupt schools but also acknowledges the right of individuals to migrate (Protocol for the Recruitment of Teachers, 2004:8). It is pertinent that this issue be discussed at this juncture.

### **3.2.1 The South-North migration of teachers**

The recent (from 1990) mass emigration of teachers from the developing countries of the South to the industrialised countries of the North has raised a lot of emotions probably because the emigration of teachers implies a reduced potential to replace the lost skills in education itself and in other social and economic sectors of the already impoverished

countries of the South. On the other hand the current shortage of teachers in the North is seen as a result of poor planning by these countries rich and their recruitment of teachers from the South was viewed by some as taking the easiest but not the most honourable way out of the situation (Laming, 2008:1).

Countries in the global South, especially those in Africa, suffer rapid population and labour force growth, compressed urbanisation and have economies that cannot absorb the large numbers of new workers (Adepoju, 2010:9). Population pressure due to high fertility coupled with poor economic development makes migration a viable option for the inhabitants of the global South. On the contrary, in the advanced industrialised countries there is a low rate of native population growth and migration has become a large demographic force accounting for 25% of the population growth in those countries (Papademetriou, 2003:46). Migrants from the less developed countries have become essential to these industrialised countries as they improve the support ratio, provide tax relief and also provide the aged with essential services like personal tending (Papademetriou, 2003:46). This, coupled with the fact that there is a huge gap between the developed capitalist nations and the less developed ones like the Africa nations, results in a huge migration flow from the South to the North. The incentive for South-North migration is usually huge, for example, according to Martin and Taylor (2001:98) a person from one of the poorest 110 countries could increase his/her income 10 to 20 times simply by moving to one of the 22 richest countries.

In education the manpower shortage in the North is made even worse by the fact that teaching is no longer seen as attractive, and as a result fewer and fewer young people in the North are taking up education as a lifelong career (McGregor, 2006:6). Agencies and government ministries of countries in the North began to recruit teachers significantly in the mid-1990s and eventually the recruitment reached its peak around 2001-2002 (De Villiers, 2007:67). A case in point is Britain. Britain is one of the countries that vigorously recruited teachers directly and through agencies from countries in the South as it suffered teacher shortages caused by the demography of an ageing society and the fact that teaching in that country has become a career no-one wants to get into (Miller, Ochs and Mulvaney, 2008:90). The peak of teacher shortages due to resignations and demographic factors in Britain was between 1995 and 1997 (De Villiers, 2007:68). For McGregor (2006:6) the exodus from the teaching field in Britain was because of the frustration with learner discipline, or rather the lack of it, which had become endemic in British public schools and forced the country to eventually

depend on teachers recruited from the South. Between 2001 and mid 2005 Britain recruited 1 106 teachers from Zimbabwe and 8 144 from South Africa and others countries (Miller et al., 2008:90).

Harzig et al. (2009:72) note that the South-North flow of migrants has mainly been from former colonies to former colonisers because of language, education, communication and network links. Hence countries like: South Africa, Zimbabwe, New Zealand, Australia, Canada, the US, Jamaica, India, Ghana and Nigeria were Britain's top ten suppliers of migrant teachers at the beginning of the 2000s decade (Miller et al., 2008:91). Therefore, the English-speaking former colonies have been the main source of supply of teachers for Britain.

The turning point in the recruitment of teachers was the adoption of the CTRP in 2004. Although this protocol was only signed by Commonwealth countries and was not signed into law but remained an agreement that could not be legally enforced, it did have a slowing down effect on the South-North teacher migration (Morgan, Sives and Appleton, 2005:230). The accession of eastern European countries into the European Union diverted the recruitment effort of Western Europe from the traditional countries of the South and further slowed down the South-North recruitment drive (Miller et al., 2008:92).

### **3.2.2 Teacher migration from Africa and within Africa**

Africa's history of subjugation and slavery shaped the continent's past migration flows and still influences the current migration flows. SIRDC (2007:7) states that there are over 100 million Africans in the diaspora as a result of the slave trade and these Africans have been instrumental in the building of robust economies like that of the United States. The development potential that Africa lost through forced migration during the Trans-Atlantic slave trade was gained by America, the Western European countries and others that were involved in the slave trade. The colonisation of Africa resulted in the creation of historic, cultural and economic links between the colonies themselves and with their metropolises and it is these links that have shaped and still shape the migration flows in Africa (see 3.2.1).

The migration of teachers in Africa has invariably been influenced by the above mentioned historical links. Sharing a common language becomes even more crucial in the migration of

teachers and it is no coincidence that Bertram et al. (2006:5) note that there was a significant flow of teachers in the 1990s to 2000s from South Africa to Britain because of the linguistic and cultural commonalities between the two countries. In 2003 alone Britain gave 1492 work permits to South African teachers. This number is higher than the number of permits given to any other country's nationals (Morgan et al., 2005:229). A common language between the teacher and the learner is crucial in the joint creation of knowledge as should happen in a fruitful teaching-learning situation.

Post-colonial states have all tried to move away from colonial education and create home grown education systems but it has not been easy to totally divorce their education systems from those of the colonisers. Zvobgo (1997:72) maintains that post-colonial states maintain links with former colonisers because of colonial legacy, colonial historic ties, and colonial nostalgia in certain cases. "Long after independence the majority of hardware and software packages donated to learning institutes in Zimbabwe came from Britain, America and Germany" states Zvobgo (1997:72). The link between former colonies and metropolises is also maintained through technology transfer. When the former colonies make donations of technological equipment they invariably must provide the maintenance and supply of spare parts and perishables for it and thus create closer links between themselves and the recipient country.

Africa is however not homogeneous but is characterised by diversity in terms of history, culture, socio-political system, population size, ecology and development patterns amongst other things. Therefore intra-Africa migration is propelled by a variety of reasons which include: personal security, professional advancement, increased income trade and commerce and better living conditions (Barclay, 2010:52). The major teacher migration flows in Africa have been towards those countries that can offer personal security and professional advancement. Three teacher migration magnet countries in sub-Saharan Africa are the stable economies of South Africa, Botswana and Namibia (Morapedi, 2007:234). These are countries that have enjoyed relative political stability and economic prosperity in the past decade or more. Zimbabwe, once a destination country for migrant teachers, has paid dearly for its political instability and economic woes and became an exporter "par excellence" of teachers in the past decade (Brown, 2008:286).

### **3.2.3 Benefits and challenges of teacher migration**

Does teacher migration benefit the source country or the receiving country or both? The law of demand and supply applied to the migration of teachers would imply that the emigration of teachers from a region of high labour supply but low teacher salaries to one where there is a low supply of teachers but higher salaries would eventually result in an equalisation of the salaries and working conditions thus benefiting both the source and the destination countries (see 2.5.1.2). However, the outcry of most poor source countries seems to suggest that the benefits of exporting teachers to the more industrialised countries have not been realised.

Teacher emigration is usually perceived as having the following benefits for the source country (Morgan et al. 2005:229):

- i) Lowering of unemployment among teachers.
- ii) Increased remittances to the country from the migrant teachers.
- iii) Gains in professional experience by migrant teachers abroad which could be put to use on their return to their home country.

However, the traditional source countries in global teacher migration flows have been mainly the poor countries that are usually struggling to meet their own needs for teachers and therefore, on the main do not have an oversupply of teachers. Such countries cannot enjoy the benefit of the lowering of the unemployment rate among teachers. Instead, in countries with a small stock of teachers, the recruitment and subsequent emigration of teachers has brought these countries' education systems to the verge of collapse (Protocol for the Recruitment of Teachers, 2004:8).

Migrant teachers form a group that is most likely to boost remittances to any country and many poor teacher exporting countries are likely to welcome this. However cognisance should be given to the negative effects of remittances that are mentioned in the literature of Crush and Frayne (2007) amongst others (see 2.6). The benefits of the increased flow of remittances due to teacher migration may not accrue to the whole community or even society but to the immediate families and relatives of the migrant teachers. Worse it has not been clearly established whether remittances do benefit nations as a whole or as some argue just a few individuals. Remittances are usually wasted on luxuries and for many countries it is

difficult to convert them into some productive and sustainable capacity. Sometimes remittances are used to sponsor further migration and remittances have been accused of fuelling inflation, pushing up the exchange rate of the local currency and creating dependency on remittances in certain countries and communities.

The migrant teachers abroad do gain valuable and diverse experience, especially those that migrate to more developed countries. The skills gained could be put to good use if the teachers were to return to their homeland to teach or work in education after a limited amount of time. However, evidence suggests that teachers who migrate abroad usually return home to retire, or to engage in other forms of employment or cash generation which are not teaching based and so the experience that they gain is not often put to direct use in education (Sorensen, et al. 2002:19). On the other hand, those teachers who return to teach in their homeland usually find it hard to put their experience to use as they are likely to return to poorly resourced schools after gaining experience in technologically rich schools in the North.

The source countries are more often than not left with one or all of the following challenges after the emigration of teachers. The most prominent challenges summarised by Brown (2008:286) and Tullao and Rivera (2008) are:

- i) The disruption of learning, especially if the teacher leaves during the school term.
- ii) Reduced opportunities of learning for the students left by the teacher.
- iii) The loss of community leadership.
- iv) The loss of human capital invested in the education of the teacher.
- v) Staffing and personnel management problems.

The disruption of learning when a teacher abandons his/her station during the school term is inevitable, however when this happens in a poor country struggling to meet its staffing needs as are the countries of the global south, the disruption can last for a very long time and have far-reaching consequences. The teacher in most classrooms in the South is usually the single most important resource for learning and his/her absence generally results in an abrupt stoppage of the learning process. Even in cases where the teacher is replaced promptly, he/she is usually replaced by a teacher who is less experienced and therefore less effective and it takes time before the new teacher can perform at the same level as the departed one

(Morgan, et al., 2005:229). Teacher migration therefore compromises the source country's children's right to education through the disruption of the learning process. The migrant teacher can, however, benefit personally.

Often the departure of a teacher not only affects the school and its learners but the community around the school as well. In most developing countries and especially those in Africa, the levels of education are so low that the emigration of a teacher usually robs the community members of the one person that is sufficiently literate to interpret the intricate issues of the 21<sup>st</sup> century for them. Also countries invest a lot of capital in the development of teachers and when they migrate they lose the potential returns on the investment made. Replacing even a single teacher in some countries can be a management nightmare so it becomes worse when teachers are recruited and migrate *en masse* (Brown, 2008:286).

The receiving countries enjoy certain advantages from migrant teachers. Brown (2008) lists the following:

- i) Migrant teachers help address teacher shortages.
- ii) Migrant teachers bring diversity in teaching with them.
- iii) They contribute to the overall gain in human capital.
- iv) Migrant teachers widen the tax base.

The main reason why receiving countries recruit teachers is to ease their own shortages and the migrant teachers do just that. However, some writers feel that the destination countries and in particular the industrialised countries which are traditionally the ones that recruit migrant teachers in numbers, should only use migrant teachers as a stop-gap measure as they have the capacity to develop their own teachers. McGregor (2006:2) argues that teacher shortages in the North are a result of poor planning by these countries and worse, that the use of migrant teachers does not solve the root problem of the teacher shortages in the destination countries but only sweeps it under the carpet.

Receiving countries gain the human capital lost by the sending countries when they hire migrant teachers. The human capital gained manifests itself in the creativity and professional conduct of the migrant teachers. The migrant teachers also usually bring new and diverse ways of doing things and expand both the market base as well as the tax base of the receiving

country. However the diversity brought in by migrant teachers does not come without challenges. Brown and Schulze (2007:2) warn that it might actually prove difficult to deal with diversity in the school staff and within the school administration as schools depend on continuity and cohesion to function properly. As a result, the diversity introduced by migrant teachers is at times viewed as a problem and not as something that enriches teaching and learning.

The use of migrant teachers by any country raises the question of whether the national values, morals and culture of a country can be passed on to the next generation by non-nationals. It is difficult to imagine that professionals of any one country would be able to pass a foreign culture on to the next generation. However the advent of globalisation and the rise of global cultures might actually mean that a teacher can operate effectively in any country. Also, migrant teachers do not work on their own in the host country's school but work with local teachers under the host country's administration and so the host country's culture and traditions can definitely be safeguarded. On the other hand, Brown and Schulze (2007:22) basing their argument on a case study in Botswana, warn that the use of migrant teachers by any country is a human resource management risk, since these teachers may simply disappear when they perceive that the pull factors that drew them are diminishing. Migrant workers usually disappear when the host country enters into recession leaving it worse off.

Barclay (2010:67) discusses the negative effects of migrant workers on the destination country. He lists the following effects:

- i) The undermining of local wages and working conditions.
- ii) The loss of jobs to migrants.
- iii) The jeopardising of interstate relations.
- iv) The escalation of the cost of providing public services and benefits.
- v) The rise in xenophobic attitudes in the local communities.

An influx of workers into the job market will obviously lower the value of labour in the labour market and this would result in reduced wages and probably also a lowering of the working conditions. Migrant workers are often abused in many countries as they do not enjoy union protection and at times are hired ahead of locals because they are a soft target for abuse. This fuels the notion of foreigners taking away jobs from the locals. Migrant teachers

could actually affect the salary structure and undermine the working conditions in the host country, however in many countries the employment of teachers is highly regularised and therefore not prone to reversals in working conditions as these have been negotiated and agreed upon. The employment of teachers in private schools is another matter as conditions may not be as rigid.

The escalation of the cost of providing public services and benefits suggests that migrant workers are not able to pay for their own upkeep. Migrant teachers under normal circumstances should be able to cover the cost of these services and the benefits they receive in a host country through the taxes and rates that they pay. Xenophobia, the extreme hatred of foreigners, has been on the rise worldwide in the last two decades, but the classic example of how atrocious xenophobia can be was witnessed in South Africa in 2008 when over 60 foreigners lost their lives (Morapedi, 2007). The influx of migrant workers into any society might trigger xenophobic attitudes and practices especially where locals feel that they are not getting the jobs, services or benefits that they are entitled to but that these benefits are being enjoyed by foreigners. Xenophobia has the potential to undermine interstate relations.

### **3.3 ZIMBABWE: COUNTRY PROFILE**

Since this study is about the migration of teachers from Zimbabwe, it is necessary to examine the source country so as to place the migration of its teachers in context.

#### **3.3.1 Physical location and demography**

Zimbabwe is a landlocked country to the south of central Africa. It covers 39 000 square kilometres and shares borders with Zambia to the north, South Africa to the south, Mozambique to the east and north east and Botswana to the west (ZIMSTAT and IOM, 2010:12).

The last population census of 1992 found the population within Zimbabwe to be 11,6 million and it was projected to reach 12,2 million in 2009 (ZIMSTAT and IOM, 2010:13). Zimbabwe's population is said to have a growth rate of 3.5 percent (IRIN, 2009:1). An estimated 3 million Zimbabweans are living outside the country and about one million of those are in neighbouring South Africa (Polzer, 2008:2). The country's population is multi-

ethnic but it is dominated by two ethnic groups, the Shona who constitute about 70% of the population and the Ndebele who constitute 14% (Subramain, 1998:276). The remaining significant population groups are the Tonga, Kalanga, Venda, Sotho, Shangan, Nambya and people of Asian and European origin. Ninety-nine percent of the people in Zimbabwe are of African origin (ZIMSTAT and IOM, 2010:13).

### **3.3.2 Historical background**

Zimbabwe (formerly known as Rhodesia) was a British colony until the unilateral declaration of independence in 1965. The white minority ruled the country directly and indirectly for a further 15 years after independence (Morapedi, 2007:230). The country attained majority rule in 1980 after a civil war that lasted more than 8 years and pitted armed forces loyal to The Zimbabwe African National Union Patriotic Front (ZANU-PF) and Patriotic Front-The Zimbabwe African People's Union (PF-ZAPU) against those of the minority white government led by Ian Smith. In 1980 ZANU-PF led by Robert Mugabe won the first elections in which the black majority participated and a shaky government of national unity with its former ally, PF-ZAPU, was formed (Zvobgo, 1997:16).

In 1982 after a fall out between these two parties, government troops were deployed to quell a dissident movement in the Midlands and Matabeleland Provinces, the stronghold of PF-ZAPU. An estimated 20 000 or more Ndebeles were massacred in what is known as the Gukurahundi Massacres (Sibanda 2005:258). Thousands of survivors and other PF-ZAPU supporters fled to Botswana and South Africa. Morapedi (2007:230) puts the number of Zimbabwean refugees in Botswana in 1985 at more than 4000, up from less than a 100 in 1980. The violence in the Matabeleland and Midlands provinces and the persecution of PF-ZAPU sympathisers only ended with the signing of a unity accord in 1988 between ZANU-PF and PF-ZAPU in which the latter was absorbed into ZANU-PF (Sibanda 2005:258). Having eliminated this last hurdle towards establishing a one party state, ZANU-PF was finally able to rule Zimbabwe as a virtual one-party state (Zvobgo 1997:17). However this only lasted until the emergence of the Movement for Democratic Change (MDC) in 1999 which formed a formidable electoral challenge to the political dominance of ZANU-PF and ushered in a new era of a multi-party system. In early 2000, the existence of the MDC reignited the political violence and intimidation which characterised the first decade of the country's independence (Sachikonye, 2011:20). Morapedi (2007:233) places the blame for

the political violence and intimidation that has characterised independent Zimbabwe on ZANU-PF's desire to maintain political dominance at all costs and its severe intolerance of any opposition. He views the violent land redistribution of the early 2000s as another brutal act by ZANU-PF calculated to hold on to power.

The violent land redistribution which began in 1999 saw the collapse of the commercial farming industry in Zimbabwe as 100 000 people were evicted from commercial farms (Morapedi, 2007:234). This action which was criticised by the western nations who saw Zimbabwe change from being a net supplier of food in the southern African region in the 1980s and 1990s to being a country dependent on food donations (Adepoju, 2010:20). A quarter of a million farm workers lost their jobs and most of them were displaced in the process. Almost 6000 farmers lost their farms and several lost their lives (Cross, 2009:2). This was followed by a dramatic increase in inflation. Zimbabwe's inflation rose up to 231million percent in July 2008 according to ZIMSTAT and IOM (2010:13) and culminated in the total collapse and abandonment of the Zimbabwean dollar in 2009.

### **3.3.3 Socio-cultural situation**

English is the official language and the language of instruction in Zimbabwe. Shona and Ndebele are referred to as national languages (Nkomo, 2008:355). As stated, the two major ethnic groups in Zimbabwe are the Shona and Ndebele. Historically they have evolved differently and lived geographically and culturally separate lives until recently. The Ndebeles arrived in present day Zimbabwe in the 19<sup>th</sup> century and occupied the land to the west and south of Zimbabwe (Lindgren, 2002:53); the Shona populated the rest of the country.

### **3.3.4 Political and economic system**

Zimbabwe at independence adopted socialism as its economic mode of production in line with the main sponsor of its liberation and the norm of most independent states at that time. ZANU-PF committed itself to establishing scientific-socialism in Zimbabwe in 1977 based on Marxist-Leninist principles (Zvobgo, 1997:16). During the first decade of independence it directed a large percentage of its budget towards social services like education, health and reconstruction. However, by the end of the decade it faced serious problems in financing these social programmes and eventually adopted an IMF/WB sponsored structural adjustment

programme in 1991 which saw it abandon socialism. For Zvobgo (1997:18) it was the rise in inflation, poor agro-industrial productivity, high budget deficit, disinvestment by companies and drought that forced Zimbabwe in 1991 to eventually abandon socialism in all areas except in name. For Morapedi (2007:234) the adoption of the structural adjustment programme in Zimbabwe was the beginning of the economic meltdown as it quickly led to a decline in real wages and forced more and more Zimbabweans into poverty. The Economic Structural Adjustment Programme (ESAP) that was adopted by Zimbabwe in 1991 required the state to cut down on social spending as a way of reducing the budget deficit. In the second phase of ESAP, the state was supposed to increase the privatisation of public service provision; education, health and other services were to be gradually privatised (Zvobgo, 1997:44). All this brought many families in Zimbabwe to the brink of starvation.

However, ESAP as an economic recovery programme was a monumental failure (Chikanda, 2007:48) and it led to the suffering of the majority of the population. Workers were retrenched and all developmental indices fell whilst social services were placed out of the reach of most members of society. For example, the Total Consumption Poverty Line went up from 61% in 1995 to 72% in 2003 (ZIMSAT and IOM, 2010:13).

The economic decline due to ESAP set the tone for the economic and political chaos that characterised the Zimbabwe in the 2000s (see 3.3.2). ZIMSAT and IOM (2010:19) note that Zimbabwe recorded negative economic growth between 2000 and 2007 and experienced a 46% decline in the real Gross Domestic Product (GDP) despite the adoption of several economic recovery programmes. This resulted in severe shortages of basic utilities such as water, electricity and fuel and in the shortage of basic commodities like maize-meal, sugar, cooking oil, soap and essential medicines.

Politically Zimbabwe started off as a socialist country and ZANU-PF sought to establish a one-party state in the tradition of socialist states but its efforts were hampered by the existence of the PF-ZAPU opposition party in parliament. Later socialism and the idea of a one party state were abandoned for economic expediency (Zvobgo, 1997:16). The government was never comfortable with a multi-party system and this led to the persecution of past and present members of opposition parties. ZANU-PF, with Mugabe at its helm has held onto power by any and all means for more than three decades.

### **3.4 SOUTH AFRICA: COUNTRY PROFILE**

We examine now the profile of South Africa, a unique African country that has attracted migrant labour since the late 18<sup>th</sup> Century and is the destination country in the present study.

#### **3.4.1 Physical location and demography**

South Africa is located at the southernmost tip of the African continent and shares a border with Namibia, Botswana, Zimbabwe, Mozambique and Swaziland. Lesotho is a country within the borders of South Africa which covers an area of 1 219 090 square kilometres (Statistics South Africa, 2003:2).

South Africa's population is steadily increasing; in the first census after independence in 1996 it was 40,5 million. This rose to 44,8 million in 2001 and to 48,5million in 2007 (Statistics South Africa 2007:13). The percentage of blacks remained steady at around 79% between 2001 and 2007, whilst the percentage of whites declined slowly from 10,9% in 1996 to 9.5% in 2007. The coloured and the white populations were 9% and 2,5% respectively in 2007 (Statistics South Africa, 2007:24). Zuberi and Sibanda (2005:267) estimate that foreign born migrants comprise 3% of South Africa's population.

#### **3.4.2 Historical background**

Two key, pertinent events in the creation of present day South Africa which set the country on a unique path of development and made it an attractive migration destination are: the arrival of the whites on its shores in 1652 and the discovery of diamonds and gold in 1896 (Zulu and Sibanda, 2005:220). The growth of the mining sector according to Zulu and Sibanda (2005:220) resulted in:

- i) the rapid development of a modern infrastructure in South Africa;
- ii) the rapid urbanisation of the population as the need to house the mine labourers grew, and
- iii) the need to import labour from neighbouring countries to supplement the local supply.

As the mining industry grew, so did the infrastructure to support it and towns mushroomed around the mines as more and more workers were accommodated in the single sex (male) hostels. The demand for workers was insatiable and by the mid-1890s there were over 100 000 immigrants on the South African mines. These were mainly from Mozambique, Lesotho and Malawi. The industry used poor temporary and circular migrant workers in order to cut the cost of labour (Zulu and Sibanda, 2005:220). Initially the Witwatersrand Native Labour Organisation (WENELA) and later The Employment Bureau of Africa (TEBA) was responsible for most of the recruitment of migrant workers (Zuberi and Sibanda, 2005:267) and by 1970 TEBA was operating in 10 countries and had supplied 500 000 workers to the mining industry in South Africa.

In the first decade of the 20<sup>th</sup> century, white settlers set to establish dominion over the black indigenous population. The economic and political strategy of the day according to Zulu and Sibanda (2005:220) was to exert full control over Africa's productivity and labour resources. Land dispossession was yet another reality of the settler government. Laws which were racially discriminative and limited the freedom of the native South Africans with regards to movement, employment, residence and ownership of land were passed. The Lands Native Act of 1913 with the General Areas Act of 1950 paved the way for the systematic dispossession of the native population of its land (Commission for Gender Equality, 2010:21). The other laws passed from 1948 onwards sought to restrict the mobility and residence of non-whites to designated areas (Zulu and Sibanda, 2005:220). Inspired by their policy of separate development known as apartheid, the government of the day passed the Bantu Self-Government Act of 1959 which enabled it to create ten homelands for Africans. The Bantu Homelands Citizenship Act of 1970 banished all Africans to homelands and precluded them from being citizens of the Republic of South Africa, forcing them to carry visitors' passes whenever they were outside their homelands (Zulu and Sibanda, 2005:220). The black African population which comprised about 77% of the total population was effectively restricted to only 15% of agricultural land (Commission for Gender Equality, 2010:22).

Under apartheid, South Africa became one of the most racially stratified societies in the world, with a caste-like social structure and racially based laws in place to maintain the structure (Sibanda and Zuberi, 2005:66). The apartheid policy was designed to ensure a marked economic, social and cultural gap between different racial groups with blacks,

coloureds, Indians and Asians placed in the lower strata of the social hierarchy (Sibanda and Zuberi, 2005:66).

Popular resistance to minority rule and apartheid was relentless through all this; even the banishing of blacks to homelands is seen as a strategy that was employed by the government of the day to keep the black political movements out of the main urban centres and to divide the black resistance movement (Sibanda and Zuberi, 2005:68). The beginning of the end of apartheid was in 1986 with the abolishment of the pass laws and the process accelerated after the 1990 release of the iconic Nelson Mandela from prison (Zulu and Sibanda, 2005:221). Long and intricate negotiations led to the birth of a multi-racial and multi-party democracy in 1994 (Heller, 2001:133).

Post independent South Africa registered an economic success never achieved by other African countries. Its economic growth rate rose and hit a plateau at 5%; significant progress towards the achievement of the MDG had been made by 2010 (Zimbabwe Government and UNESCO, 2010:3). However, the country also faced challenges such as a high HIV prevalence rate and, inequality in access to quality education and health services. These pose serious challenges to the eventual achievement of the MDG goals (Zimbabwe Government and UNESCO, 2010:3).

An important and pertinent historical development was that of changing the teacher training format. The decision to reduce teacher education colleges from 150 in 1990 to 34 in 2000 and to eventually phase them out and incorporate them into university education faculties had a tremendous effect on the country's graduate production (Paterson and Arends, 2009:99). The decision was apparently motivated by the need to produce teachers in a more efficient and cost effective manner. However the effect of this move greatly reduced the number of teachers produced per year since the absorption of teacher-training colleges into universities did not include the absorption of prospective college students into the university. It also curtailed the access of the rural population to teacher training and compromised the geographical spread of teacher education centres, concentrating them only in urban areas (Paterson and Arends, 2009:100).

The teacher numbers in South Africa were further reduced by HIV and AIDS which affected the main group from which teacher recruits traditionally came from, namely the young

African female. Consequently a further decline in the registered student numbers in teacher training was witnessed (Paterson and Arends, 2009:100). Miller et al. (2008:90) state that in 2004 alone 4 000 teachers succumbed to HIV related illnesses.

### **3.4.3 Socio-cultural situation**

The apartheid's divide and rule policies which confined different ethnic groups to designated homelands and kept different racial groups apart meant that even after the collapse of apartheid the groups still maintained distinctive cultural identities (Sibanda and Zuberi, 2005:66). It also resulted in the African National Congress (ANC) inheriting a nation marked by staggering inequalities, but one with a huge capacity and great infrastructure. Jensen (1998:256) maintains South Africa's skewed distribution of resources and income resulted in unbalanced consumption characterised by low household security levels among the blacks.

Racially, the country's population is divided into whites, coloureds, Asian and Indians and black Africans. The black African population is further divided into the following ethnic groups: Zulu, Ndebele, Xhosa, Northern Sotho, Southern Sotho, Tswana, Swazi, Venda and Tsonga (Statistics South Africa 2007:24). English is the lingua franca and is spoken throughout South Africa despite it being the home language of only about 8% of the population. A total of eleven languages are recognised as official languages; these are Afrikaans, English, IsiNdebele, IsiXhosa, IsiZulu, Sepedi, Setswana, SiSwati, Tshivenda and Xitsonga (Statistics South Africa, 2003)

### **3.4.4 Political and economic system**

South Africa is a multi-party democracy born out of a difficult and protracted negotiation process which has been celebrated as one of the most inclusive of its kind (Heller, 2001:133). Heller (2001:134) notes that since 1996 South Africa has adopted an orthodox strategy of growth led development and is fortunate that unlike in many other African countries, it has not been subjected to a formal structural adjustment programme. Therefore it has a relatively low external debt, high levels of internal investment, significant foreign currency reserves, a diversified manufacturing base and is well endowed with natural resources. It is no wonder then that South Africa's economy is usually hailed as sub-Saharan Africa's most advanced (World Bank, 2009:21).

### **3.5 OVERVIEW OF ZIMBABWE-SOUTH AFRICA WORKER MIGRATION**

Migration between Zimbabwe and South Africa dates back to pre-colonial times and some of the cultural links that influence present migration flows can only be understood through the examination of the migration history of these two countries. Trimikliniotis, Gordon and Zondo (2008:1324) note that sometimes politicians prefer to discuss migration between Zimbabwe and South Africa without taking cognisance of history. Instead they portray it as if this migration were a new phenomenon. It has already been noted that SADC countries have been traditional labour suppliers for South African mines and farms since the 1860s. The development of migration between the two countries will now be discussed in detail.

#### **3.5.1 Historical Overview**

Barclay (2010:49) discusses the famous migration of the Congo-Niger linguistic group that began about 2000 years ago, continued for more than 1500 years and resulted in the people of the Bantu origin arriving in South Africa around the 14<sup>th</sup> century A.D. Although the reasons are not agreed upon it is thought that the need for political freedom coupled with demographic pressures might have triggered this huge migration.

Strong empires existed in the region in pre-colonial times and the Great Zimbabwe and Zulu kingdoms are examples of this. Even then, the motives for migration were always present in the form of a quest for personal freedom, the need for political security and freedom from religious coercion, trade and commerce (Barclay, 2010:48). History records the migration of various groups from the Zulu kingdom in search of political freedom. One of the key groups that migrated from Zululand and settled in what eventually became Matabeleland and Midlands in Zimbabwe was the Ndebele also known as the Matebele (Lindgren, 2002:53). This historical event is crucial in understanding the contemporary migration links between Zimbabwe and South Africa. Anecdotal evidence seems to suggest that migrant Ndebeles from Zimbabwe have always found it easy to re-integrate into the South African society as they usually enjoy easy acceptance in the South African communities.

A shared colonial history cements the historic links between the two countries. Worker migration from neighbouring countries to South African mines and farms began as early as

the 1860s (Trimikliniotis, et al. 2008:1324). Campbell (2010:175) notes that the apartheid South African government made arrangements with several colonial African states to supply labour to the mines. The mines experienced a shortage of labour whilst the surrounding African countries had very poor employment opportunities to offer. By mid 1890s there were about 100 000 migrant workers in South Africa (Zuberi and Sibanda, 2005:269) and by 1921 they were almost 280 000 foreign born workers working as miners, farm labourers and domestic hands (Trimikliniotis et al., 2008:1324). By 1970 the Employment Bureau of Africa (TEBA) and its predecessor The Witwatersrand Native Labour Organisation (WENELA) had supplied 500 000 migrant mine labourers (Zuberi and Sibanda, 2005:269). The traditional suppliers of labour for South Africa were Mozambique, Zimbabwe, Lesotho and Malawi, however between 1920 and 1990 every country in the SADC had at one time or another supplied labour to South African mines (Trimikliniotis et al., 2008:1324).

Most post-colonial states withdrew their nationals from South Africa after they gained independence and so there was a decline in migrant worker supply, however a certain level was maintained through irregular migration (Campbell 2010:177). Apartheid South Africa did not enjoy a good relationship with its newly independent neighbours and even embarked on a policy of destabilisation meant to undermine these states economically and politically because of their support of the South Africa liberation movements. Zuberi and Sibanda (2005:269) however attribute the decline in migrant recruitment to depressed gold price although what is likely is that the decrease in volumes of labour supply was caused by both factors, that is, the withdrawal of labour by independent neighbouring states and the decline in the gold price.

Zuberi and Sibanda (2005: 269) use the Southern Africa Migration System (SAMS) to explain the persistent flow of poor circular migrants to South Africa after formal recruitment had ceased. They contend that the SAMS is a major, dynamic and self-sustaining labour migration flow that exists within countries that have historical, political, cultural and economic ties. These countries are Botswana, Lesotho, Malawi, Mozambique, Swaziland, Zambia and Zimbabwe. The SAMS was born out of the many years of migrant labour recruitment from the above mentioned countries to South Africa's mining and agricultural sector. It is realistic to expect that after the many years of migration flow between the countries and the establishment of migration networks, it would not just cease to happen. Migration networks form an important factor in international migration and encompass

everything that potential migrants need to learn about opportunities abroad and how to take advantage of them (Martin and Taylor, 2001:102). Migration networks explain why migration flows are self-sustaining and cannot be turned off at will (see 2.5.1.2).

The dismantling of apartheid and the advent of majority rule in 1994 coincided with a decline in some of the economies within the region, including Zambia, Zimbabwe, Nigeria and the Democratic Republic of Congo. It also coincided with political strife in Ethiopia, Sudan, Somalia and Mozambique (Adepoju, 2010). As a result of the dismantling of apartheid and the economic and political problems in the region, there was a huge inflow of migrants into independent South Africa. The largest migrant group in post independent South Africa were the Mozambicans. Only in the 2000s were they overtaken by Zimbabweans (Campbell, 2010:177).

### **3.5.2 Contemporary migrant worker typology**

The migrant Zimbabwean teachers currently in South Africa are, on the main, part of the huge contemporary migration flow from Zimbabwe. One of the major characteristics of the post 2000 migration flow of Zimbabweans to South Africa is its mixed nature. Polzer (2008:1) maintains “mixed migration” is only a recent phenomenon in migration policy discussions and that the Zimbabwean migration into South Africa after the year 2000 presents a classic example of this. South Africa’s incoherent response to this migration highlights the many difficulties posed by this type of migration. Another characteristic of the post 2000 migration flow from Zimbabwe to South Africa is its large scale. ZIMSAT and IOM (2010:14) explain that Zimbabwe experienced a steady increase in emigration after 2000 but that it accelerated as the economic conditions deteriorated. Rutherford (2008:402) on the other hand talks of an “extremely large number of Zimbabweans” escaping the economic meltdown and migrating to South Africa to eke out a living. The migration experts are cautious and do not provide concrete numerical estimates of Zimbabweans living in South Africa; this is because of the lack of accurate enumeration methods to quantify this fluid population. Polzer (2008:2) states that a commonly agreed upon estimate for the number of Zimbabweans in South Africa towards the end of the 2000s decade is 1 million.

Polzer (2008:3) further provides a comprehensive list of the types of Zimbabwean immigrants into South Africa. They are:

- i) Refugees: those running away from individual or group persecution.
- ii) Humanitarian migrants: people fleeing extreme deprivation and starvation of self and family.
- iii) Economic migrants: these range from the unskilled to the highly skilled who migrate with the aim of finding work so that they can support their families.
- iv) Traders who move back and forth buying and selling wares.
- v) Borderland residents who move back and forth but remain within the border area.
- vi) Transit migrants who enter South Africa but want to move on almost immediately.
- vii) Unaccompanied minors who usually remain in the border areas or move to major urban centres and are a reflection of the increasing humanitarian crisis.

The classification of some of the contemporary migrants into South Africa as refugees has been problematic because there is no outright war or conflict in Zimbabwe. It has proved difficult for individuals or groups to prove that they are being persecuted by authorities in their home country. Authorities in South Africa have resisted building refugee centres for Zimbabweans and prefer to refer to the Zimbabwean migrants as economic refugees who are in South Africa only to seek sustenance for themselves and their families. They maintain that the migrants do not fit the United Nations' definition of a refugee (Polzer, 2008:3).

The humanitarian crisis in Zimbabwe was exacerbated by a number of events in the 2000 decade. Among these were:

- i) The haphazard land redistribution initiated in 2000 that displaced almost 6000 commercial farmers and about a quarter of a million farm workers from the farms (Cross, 2009:2) and turned the country from being "Africa's food basket" to a basket case (Adepoju, 2010:20).
- ii) The 2004 destruction of illegal settlements in "Operation Murambatsvina" (i.e. "clean-out the trash") in which 700 000 persons either lost their homes or sources of livelihood and 2,4 million people were directly or indirectly affected (Tibaijuka, 2005:6).
- iii) The shop invasions of 2006 in which shops were targeted in a bid to enforce price controls but eventually resulted in the emptying of shops and serious shortages of basic commodities (Wines, 2007).

- iv) The fuelling of inflation which resulted in the unprecedented collapse of the Zimbabwean dollar, further exacerbating the suffering of the masses. Inflation in Zimbabwe rose from 25% in 1998 to 700% in 2003 (Tevera, 2005:5) It finally peaked at a world record of 231 million percent (ZIMSTAT and IOM, 2010:13).

Under these circumstances migration to South Africa became a survival strategy for almost all Zimbabweans.

Economic migrants are those who move in order to maximise their earning potentials. All groups of skilled and unskilled migrants have found their way into South Africa. However as mentioned earlier there is an extensive history of unskilled worker migration from Zimbabwe and other countries in the region to South Africa. These workers traditionally found employment in the South African mines and farms (Rutherford 2008:401). The post-independence flows of skilled emigrants from Zimbabwe were mainly to South Africa and Solomon (1993:5) notes that 448 doctors left Zimbabwe and settled mainly in South Africa and Botswana in the 1980s and that by 1993, the number of skilled people who had left the newly independent state was around 15 000. The adoption of the Economic Structural Adjustment programme in Zimbabwe coincided with the opening up of South Africa after the fall of apartheid, and this sustained a steady flow of skilled and unskilled economic migrants from Zimbabwe to South Africa (Rutherford, 2008:401). With the opening up of South Africa in the 1990s came even better opportunities for skilled labour immigration. After 2000 teachers from Zimbabwe apparently migrated in large numbers as part of this post-apartheid skills flow.

### **3.5.3 Teacher migration from Zimbabwe**

Accurate Zimbabwe teacher migration statistics are hard to come by because no comprehensive records have been kept and also because of the sometimes clandestine nature of the migration. In spite of this it is generally agreed that the out-flow of teachers has been huge. Brown (2008:286) describes Zimbabwe as “teacher exporter par excellence of the 2000s decade” while McGregor (2006:4) describes the migration flow of the 2000s as “a new migration order.” PTUZ (2008) state that 35 000 teachers had left the country by 2009, mainly destined for South Africa, Botswana and the United Kingdom. In South Africa De Villiers (2007:69) quotes statistics to argue that there were already 10 000 Zimbabwean

teachers in South Africa by 2004 and 4 000 of these were qualified Mathematics and Science teachers, something South Africa greatly lacked. In Britain between 2001 and mid-2005, 2 106 Zimbabwean teachers were recruited.

The reasons for teacher migration in Zimbabwe are discussed in detail elsewhere (see 3.6.6 and 3.6.7) but in brief they migrated to escape the general conditions prevailing in the country during the 2000s decade which included hyperinflation, unavailability of cash and commodities, economic and political uncertainty and the breakdown of service provision. In particular teachers were affected by very low salaries, under-resourced schools, political victimisation and an erosion of their social status and self-esteem. They were drawn to other countries mainly by economic factors such as increased pay but also by political stability and sound amenities.

#### **3.5.4 Teacher migration from South Africa**

South Africa has not been spared teacher emigration but it has been able to attract teachers from other countries in the region. The lack of concrete data on the number of teachers migrating from South Africa has been lamented by many a researcher but indications are that the country is losing a large number of teachers annually through out-migration. Miller et al. (2008: 90) observe that in 2004 alone 21 000 teachers left South Africa, mainly for Britain.

Establishing the reasons for teacher migration from South Africa has received some attention from researchers and one such researcher is Manik (2009) who lists the following push factors:

- i) career dissatisfaction;
- ii) limited chances of promotion;
- iii) poor management styles of school leadership;
- iv) a feeling of inadequacy with the introduction of Outcomes-Based Education (OBE);  
and
- v) high teacher pupil ratios.

Changes in the teacher training format, HIV and AIDS and migration have all combined to reduce the number of teachers that South Africa can produce. South Africa faces serious shortages of teachers in mathematics and science and so it must recruit migrant teachers to

fill that gap. The introduction of a special quota permit for the mathematics and science teachers in 2005 made it easy for the country to recruit the urgently required mathematics and science teachers (Department of Home Affairs, 2007).

### **3.6 FACTORS IN THE ZIMBABWE-SOUTH AFRICA TEACHER MIGRATION**

Differences in income and working and living conditions form what Dovlo (2003:5) has described as a migration gradient giving the impression that the greater the gradient, the greater the migration flow. However the existence of the migration gradient, though necessary for migration, is not on its own sufficient to provoke migration flows; facilitating factors must also exist before a migration flow commences or widens (Martin and Taylor 2001:102; see 1.1). This theory explains why even though disparities in working and living conditions exist all the time, migration does not always happen. The facilitating factors in the migration of Zimbabwean teachers to South Africa are identified and examined in this section.

#### **3.6.1 Educational links between Zimbabwe and South Africa**

Zimbabwe and South Africa have both formally and informally maintained links in education and it is these links that have made the education systems of the two countries compatible, allowing Zimbabwean teachers to feel that they can comfortably integrate into the South Africa system with minimal adjustments. A brief examination of examples of formal and informal links is made and particularly of such links between Zimbabwe and South Africa which facilitate teacher migration.

Formal educational links between the two countries can be seen through the SADC Protocol on Education and Training (Southern African Development Community, 1997) which seeks to promote co-operation in all areas of education between member states. In teacher training for example, it seeks to move from comparability to harmonisation and eventually the standardisation of the certification of teachers. In addition, Zimbabwe sends thousands of bright but disadvantaged learners to South Africa on a Presidential scholarship. In 2012 there were reported to be around 250 Zimbabwean students in 15 South African universities thanks to the Presidential scholarship programme (Ndlovu, 2012).

Informally, Zimbabweans who can afford the fees, have sought university education in South Africa; a look at the enrolment of any South African University will attest to this. The University of South Africa (UNISA) is one of the largest universities in the world and it makes use of the open and distance learning mode to reach its learners worldwide. In 2008 the university Principal reported that they had about 10 000 Zimbabwean students enrolled at the university (University of South Africa, 2008). In Zimbabwe it is favoured by teachers who want to further their education because of the flexibility of its teaching mode. Furthermore, Zimbabwean teachers who are graduates of UNISA may feel that they can operate in the South African education system and so could be encouraged to migrate in this direction.

### **3.6.2 Geographical proximity**

Geographical proximity makes migration between any two countries easier mainly by cutting the cost of migration. The cost of migration to any country has been greatly reduced by the advent of globalisation and its improved technology which has made transportation cheaper and safer (El-Ojeili and Hayden, 2006:61). Geographical proximity also means that the migrants can maintain closer links with their relatives in the homeland and can remit much easier and at a lower cost. In other words they can engage in transnational activities easily (McGregor, 2006:18). It is assumed that the decision of Zimbabwean teachers to migrate to South Africa was influenced to a certain extent by the geographical proximity of the destination country.

### **3.6.2 Socio-cultural proximity**

Socio-cultural proximity is a factor in the migration of Zimbabwean teachers to South Africa. Zimbabweans and South Africans share socio-cultural characteristics which are linked to their same origin as Bantu people whose origins can be traced back to the Congo-Niger linguistic group mentioned by Barclay (2010:49). The philosophy of Ubuntu is a unique African philosophy that advocates the respect of a person for no other reason other than that he/she is a human being. It unites the people of different countries in the region (Gianan, 2010:93) and is a philosophy that should assure migrants humane treatment as they travel around the region.

However, even closer ties exist between the people of the two countries as they share ethnic groups that were once one but have been divided by the borders drawn arbitrarily by Europeans without much attention being paid to existing African nations or their separation through the process of migration. The Sotho and Venda people living in the border area of the two countries are an example of people who have been divided between the two countries. The Ndebele (also known as Matebele) people living in the south and south-western parts of Zimbabwe number 2 million and are ethnic Zulus who migrated from KwaZulu Natal to seek greater political freedom in the early 1800s (Lindgren, 2002:53). They still speak a dialect of IsiZulu. There are enclaves of Shanganis and Xhosa living in Zimbabwe.

However, the largest linguistic group in Zimbabwe is the Shona group comprising 75% of that country's population (Zimstat and IOM, 2010). They speak a language not spoken in South Africa but migrant teachers from this group would still be able to communicate in English which is the lingua franca and a language of instruction in both countries (Nkomo, 2008:354).

#### **3.6.4 Historical links**

Key historic links likely to influence migration between the two countries have already been alluded to. These historic links enabled the creation of the networks that eventually shaped future migration flows. The migration of ethnic groups from South Africa northwards including the Ndebele who eventually settled in south and south western Zimbabwe (see 3.6.3), the common colonisation of the countries by the British, the recruitment of labour for the South African mines and farms up to the 1990s, the liberation process which saw some South Africans live in exile in Zimbabwe and other neighbouring countries, the collaboration between the liberation movements of Zimbabwe and South Africa in their quest for liberty (Sibanda, 2005) all helped create migration links that have enabled the Zimbabwean teachers to easily migrate to South Africa. These historic links also shape the expectations of the Zimbabwean migrant teachers.

#### **3.6.5 Economic and political ties**

The two liberated countries, Zimbabwe and South Africa, have enjoyed cordial political relations albeit with a few misunderstandings. At independence Zimbabwe experienced a

boom in its economy (Morapedi, 2007:229) making it a challenge even to the South African economy. It suffered acts of economic and political destabilisation in the 1980s from the apartheid South African government (Sibanda, 2005:55) but later enjoyed cordial relations with the independent South African government. The presidency of South Africa has been actively involved in facilitating a negotiated political settlement to Zimbabwe's political and economic crises since the mid-2000s through the auspices of the Southern African Development Community (SADC). The signing of an agreement between major political players ushered in the start of the government of national unity. The 2008 agreement between ZANU-PF and MDC formations after the contested 2008 elections in Zimbabwe is one of the achievements of the South African led negotiation team.

### **3.6.6 Push factors**

The neo-classic model popularly referred to as the push-pull factor model has been criticised (Harzig, Hoerder and Gabaccia, 2009:62) for being too linear and simplistic in the way that it explains migrant motivation for migration and for concentrating too much on economic factors at the expense of the socio-cultural factors pertinent to migration. However it has been used extensively in literature since it has been found to be useful in ordering discussions on why people migrate. In this section we will use the model to analyse the factors in the migration of teachers from Zimbabwe to South Africa. The push factors will be discussed first.

Very few studies have concentrated on hostile factors that are possible causes of emigration of teachers from Zimbabwe and countries further afield. The migration of health professionals has on the other hand attracted much more attention from, for example, Dovlo (2003). The push factors in the migration of teachers from Zimbabwe in the current migration wave which started in the early 2000s have been clearly discussed by the two major teacher unions in the country, ZIMTA (Zimbabwe Teachers' Association) and PTUZ (Progressive Teachers Union of Zimbabwe) (ZIMTA, 2008a:2.5 and PTUZ, 2008). These are:

- i) Low pay: resulting in the economic incapacitation of teachers.
- ii) A serious decline in the socio-economic status of the teacher.
- iii) Under funding of the education system.
- iv) Under resourced classrooms and schools.

v) Political persecution of teachers.

The failure of the country to adequately fund education is apparently at the centre of teacher emigration from Zimbabwe. This has resulted in low levels of pay that are not competitive regionally, classrooms with very few resources and a decline in the teacher's social standing in the society. Chakanyuka, Chung and Stevenson (2009:34 and 103) report that Zimbabwean teachers in 2009 were earning a total of US\$225, including allowances. This amount is well below US\$10 per day. Historically teachers had been earning an average of US\$500 a month but with the hyperinflationary conditions of the 2000s this was reduced to US\$2 in 2009. By contrast, a South African teacher earned around R9000 (US\$900). Tevera (2005:1) addresses the issue of the migration of Zimbabwean professionals and maintains the level of dissatisfaction of Zimbabwean professionals with economic conditions is the highest in the region. He says they are particularly worried about salaries, the cost of living, taxation and the availability of goods. He continues that the deeper worries of professionals concern housing, medical services, education, HIV/AIDS and the future of their children. Teachers in Zimbabwe can barely afford decent housing, medical attention and the fees for the education of their children. In some cases teachers are supported by donations of money and groceries from the parents of the learners they teach (ZIMTA, 2008a: 2.5). This obviously undermines their status.

Under resourced classrooms where a serious shortage of textbooks is the norm is very frustrating for teachers. This is worse in dilapidated schools with inadequate classrooms and very poor or no housing for teachers. These are unfortunately the kind of conditions that the majority of Zimbabwean teachers have been facing since the beginning of the 2000s and this has resulted in the teachers' status and morale hitting its lowest ebb since 1980 (Chakanyuka et al., 2009:34).

The two main teachers unions have both claimed that their members suffered politically motivated harassment, especially in the periods leading to and immediately after elections. In the 2008 elections teachers who were involved as polling officers were openly accused of influencing the result of the 29 March elections (ZIMTA, 2008a:3.5) and some were arrested for it. ZANU-PF has accused teachers of working for its nemesis, the MDC.

Conditions external to the teaching profession like the hyperinflation rate that wiped away all savings and pessimism about the political and economic recovery of the country are factors that could have tipped the balance in favour of migration (Tevera, 2005:6).

### **3.6.7 Pull factors**

Certain socio economic conditions must have attracted Zimbabwean teachers to the South African teacher labour market but literature is scant on these pull factors. ZIMSTAT and IOM (2010:70) suggest that the post-1990 changes in South Africa's political and economic situation made South Africa an attractive destination for professionals instead of it being simply a haven for unskilled labour. Although a substantial volume of literature has been generated on the reasons for the migration of health professionals and of professionals in general, very little is available on the reasons for the migration of Zimbabwean teachers to South Africa. These can, however, be inferred by examining certain conditions existing in South Africa.

Better salaries could have been a pull factor because even at its best, the salary of Zimbabwean teachers in the last decade was below 20% of that of South African teachers. This resulted in some teachers quitting the profession in Zimbabwe and migrating to South Africa to work as security guards and waiters, in some cases; jobs which paid far less than teaching in South Africa but more than teaching in Zimbabwe.

Job availability could have been another pull factor. The Zimbabwean public and teachers in particular may have been well aware of the shortage of teachers in Mathematics and Science in South Africa through South African newspapers circulated in the country. Since 2005 the South African government has approved quota work permits for 1 000 teachers of mathematics and science every year, opening up the opportunity for foreigners to come into South Africa to look for work as teachers in those areas (Department of Home Affairs, 2007). South Africa is suffering from a high teacher attrition rate due mainly to migration and death from HIV/AIDS. It has a low teacher replacement rate due to its present teacher training format which has created a huge teacher deficiency (Paterson and Arends, 2009:99-100).

### **3.7 MANAGING TEACHER EMIGRATION IN ZIMBABWE**

Teacher migration is apparently here to stay and Zimbabwe and other countries must therefore find ways of dealing with it. El-Khawas (2004:51) offers the following advice to countries reeling from the emigration of professionals: first contain then attract back. However, like most advice this is easier said than done. The advice will nevertheless be used as a framework for tackling the issue of managing teacher migration in Zimbabwe.

#### **3.7.1 Teacher retention**

For any teacher-retention strategy to succeed it must address the push factors that are forcing professionals to emigrate and focus on the pull factors attracting the professionals away. A key theme of the push factors in the emigration of Zimbabwean teachers is the under-funding of education which has resulted in low pay for teachers and the subsequent decline in their joint status in society. Furthermore, the lack of resources within schools makes the teachers' work difficult (see 3.6.6 and 3.6.7). The country therefore needs to direct more funds to education and must try and improve teacher salaries to a level where teachers can afford a decent life without having to be supported by the parents of the children they teach as noted by ZIMTA (2008a:2.5). A wage structure that is competitive regionally would eliminate one of the key pull factors, that of pay. According to the ZIMSTAT and IOM (2010:57), the government of Zimbabwe has realised the need to align its public sector's working conditions with those of other SADC countries and has put it as an objective in a draft of national migration management policy. In 2005 Tevera (2005:1) found that the deeper concerns of teachers were housing, the availability of medical attention, education and the future of their children with HIV/AIDS being so prevalent. These could all be addressed if teachers were to be paid sufficiently as they would then be able to care for themselves. Alternately the worries could be addressed directly by giving teachers access to housing schemes and medical aid schemes and affording them easy access to education for themselves and their children.

However, the challenge is how the government could raise the money to fund education. El-Khawas (2004:51) recommends an overhaul of the political and socio-economic systems of the African countries that suffer rapid emigration of professions and a drastic improvement in the employment system paying special attention to wages, conditions of service and career opportunities in order to retain these professionals. In other words, improve the teachers'

conditions at home and eliminate need to migrate. An overhaul of the working conditions of teachers would indeed be welcome for most teachers in the countries of the South, however these countries might not be in a position to invest money in these education systems. In most countries suffering from teacher emigration (Zimbabwe and South Africa included), education already receives one of the highest budget allocations annually and a huge percentage of this budget allocation goes to the payment of salaries. In spite of this the countries are still not able to retain their teachers. South Africa for example allocated 21% of its 2011-2012 budgets to education, the highest percentage for any sector (National Treasury, 2011). Therefore, whilst suggestions to overhaul the whole political and economic system are honourable, it may be difficult to implement for countries like Zimbabwe which are already cash strapped. A step by step implementation could be an alternative.

Political persecution and insecurity in Zimbabwe has been present quite some time and characterises the whole of the 2000s decade (McGregor, 2006:3). However, slow progress towards political stability has been noted in the country with all major parties signing an agreement called the Global Power-sharing Agreement in which they agree to work together for the good of the country. The parties that are signatory to the agreement have shown commitment to education and the return of migrant teachers (Agreement between ZANU-PF and MDC formations, 2008: 11). It is hoped that they understand that political stability will go a long way to reassuring teachers to stay in the country and encourage those already outside to consider returning.

Dovlo (2003:5) also offers several suggestions, with special reference to health professionals, which are pertinent at this time. He lists the following suggestions:

- i) Offering incentives and motivations to professionals for not migrating.
- ii) Introducing bonding or compulsory service schemes.
- iii) Introducing locally relevant curricula.
- iv) Selecting persons who are unlikely to migrate for training.

Offering retention incentives to Zimbabwean teachers could work if these were substantive enough to counter the lure of higher regional and international salaries. Retention allowances have been awarded to health professionals in Zimbabwe, however research on the effect of the allowances on retention has not yet been done. Early indications are that these were not

substantive enough to put the brakes on the migration of these professionals. Bonding, or compulsory service scheme, usually works for newly graduated professionals who in most cases are not yet ready to emigrate anyway as they might want to accumulate a few years of experience before doing so. It is the loss of experienced teachers that is more hurtful to the education system and replacing them with novices is usually not a solution as novices need time before they can perform at the same level as the experienced teacher. Bonding would allow the Zimbabwean education system to retain only the newly qualified teachers who still need to learn the ropes but would not help retaining the experienced ones that the country most needs. Using locally relevant curricula in the training of teachers is a good thing as it makes them more effective in their communities. However, one wonders if such narrow curricula could exist in the globalised world of today.

### **3.7.2 Return migration of teachers**

To attract back professionals who have migrated is probably a dream most sending countries hope could come true. South Korea is apparently one country that managed to attract back a number of its skilled professionals in the 1980s through an incentive scheme (El-Khawas, 2004:52). An overhaul of the conditions that forced the professionals to migrate would be an obvious first step towards winning back the confidence of the migrant teachers. Suggestions encountered in literature (El-Khawas 2004:52; ZIMSTAT and IOM, 2010:58) designed to encourage the return of professionals are:

- i) Making repatriation easier for the returning teachers.
- ii) Giving incentives to returnee teachers.
- iii) Encouraging the full or partial return through incentives or other schemes.
- iv) Maintaining a data base of migrant teachers.

### **3.7.3 Brain circulation**

Brain circulation means ensuring that skilled professionals remain within the region with the hope that they will someday return. However, I discuss under this sub-topic the various measures which I argue could reduce the negative effects of migration. These are:

- i) Encouraging teacher migration between countries within the region.

- ii) Allowing migrant teachers to return partially and work on short contracts.
- iii) Linking teachers abroad with those at home electronically in order to share ideas.
- iv) Allowing returnees to work in any country within Africa or the region.

Brain circulation for the Zimbabwean teacher migration flow might mean trying to encourage the teachers who have migrated and those that intend to migrate to stay within the region. A large number of Zimbabwean teachers are in South Africa, Botswana and Namibia (Brown and Schulze, 2007:22) which offers hope to Zimbabwe that they might one day return. However it is important that they are kept in those countries and do not end up migrating further. This might require the intervention of the Zimbabwean government to initiate talks about ensuring ideal working conditions for these teachers so that they are not tempted to migrate further. Encouraging the teachers to maintain links with the homeland, especially encouraging them to invest in Zimbabwe, could assist. However, this might be difficult considering that the Zimbabwean government has very little or no contact with people who have migrated as it maintains no official links with them (ZIMSTAT and IOM, 2010:91).

Allowing the partial return of teachers is an option that Zimbabwe and other countries could consider and it might fit in with migrant teachers' transnational activities. Migrants from time to time may want to take time out and return to their homeland to rest or to assist their family or relatives through difficulties (Brettell, 2008:115). Linking teachers abroad with those in the homeland is an option that Zimbabwe might consider however, technological challenges in the rural areas where the majority of Zimbabweans live could hamper this process. An electronic link would at least require electricity and that in itself is still a challenge in most areas of Zimbabwe. Only 36% of the households in Zimbabwe have access to electricity (Central Statistical Office (CSO), 2008: 4). However such a linkage programme could be pilot tested in the urban areas where according to CSO up to 98% of the households have electricity (2008:4). This programme could be beneficial for Zimbabwe as a transfer of technology and skills could happen without the migrant teacher having to return to the country. Allowing returnee teachers to settle anywhere in Africa could also be considered, however it is possible that this could benefit countries with better living conditions more than those which are most desperate for teachers.

### 3.8 SUMMARY

The Zimbabwe-South Africa teacher migration flow appears to be part of a large contemporary migration from Zimbabwe sparked by the economic meltdown in the country. Teachers in Zimbabwe have been pushed to migrate apparently by the Zimbabwean government's under-funding of the education system which has resulted in low teacher salaries and poor working conditions in scantily resourced schools. Politically motivated violence directed at teachers and an uncertain political and economic future are further push factors in the migration of Zimbabwean teachers to South Africa. The factors that pulled Zimbabwean teachers to migrate to South Africa are apparently the higher salaries, job availability and political stability. But why did they choose to migrate to South Africa? Geographic and socio-cultural proximity coupled with educational compatibility between the two countries are factors that are likely to have determined the direction. Zimbabwe and South Africa share a long history of migration between them and are both part of the Southern African Migration System (SAMS). Zimbabwe has traditionally supplied unskilled migrant labour to South Africa. Zimbabwean teachers have apparently jumped on the band wagon of migration to South Africa and have thereby brought about a sophistication of the SAMS.

Zimbabwe needs to deal with the phenomenon of teacher migration. Suggestions are that first it must stem the outflow of teachers then try and attract back those who have already left. For that to happen the country will need to address both the push and the pull factors mentioned above, however doing that entails a complete overhaul of the whole Zimbabwean political and economic system. The country must make itself attractive to teachers within and without. The fact that most migrant teachers remain within the region offers hope for Zimbabwe that they may one day return, however measures must be adopted to ensure they do not migrate further. Zimbabwe could also find ways to tap the skills of migrant teachers without them necessarily returning or returning permanently. An electronic link between the migrant teachers and those at home is one option and allowing migrant teachers to temporarily return and work for certain periods of time is another.

This chapter sought to put teacher migration from Zimbabwe to South Africa in context and examine the factors that influence this migration flow. Global teacher migration, South-North teacher migration and teacher migration in Africa was examined. Pertinent contextual issues

in Zimbabwe and South Africa were examined and the push and pull factors in the migration of teachers from Zimbabwe to South Africa were discussed. The chapter was concluded by examining how Zimbabwe could deal with the problem of teacher migration.

In the next chapter I describe and justify the methodology adopted for this research. The qualitative approach as a general approach to the research will be explored and the specific strategies that were adopted for this research will be examined. Research tools will be noted and justification for their use given. Methods of data analysis and presentation will also be discussed.

## **CHAPTER 4**

### **RESEARCH APPROACH, DESIGN AND METHODOLOGY**

#### **4.1 INTRODUCTION**

In this chapter an outline of the methodology of the research that was used is provided. The chapter discusses the qualitative research approach which was adopted for this project. The constructivist grounded theory research design which was found appropriate for this study is outlined and specific grounded theory research methods, data analysis and data presentation methods that were used are outlined and justified. Ethical considerations of the research and the issue of trustworthiness of results are also discussed.

#### **4.2 FOCUS OF THE RESEARCH**

This research sought to uncover the factors that drive the migration of teachers from Zimbabwe to South Africa and to explain how these factors function within a grounded theory of teacher migration. The experiences of a small sample of teachers who migrated from Zimbabwe to South Africa were solicited in the empirical research.

Henning, van Rensburg and Smit (2004:1) argue that the choice of the research approach is linked to what the researcher would like to find out and to the type of inquiry that a researcher conducts. They say that it is the inquiry that directs the researcher to use certain methods, techniques and tools. Below is the discussion of the research approach that was found appropriate for this inquiry.

#### **4.3 RESEARCH APPROACH**

The empirical study was mainly qualitative. Researchers are increasingly placing the qualitative and quantitative approach on a continuum as strong arguments have been put forward against the polarisation of the two approaches (Bamberger, 2000; Glaser-Zikuda and Jarvela, 2008). Both approaches to research are now considered to be empirical in that they make a systematic study of a given phenomenon. However, both are also considered subjective as the researchers and participants always introduce subjectivity into a study whether it is qualitative or quantitative of nature (Fischer, 2006). The qualitative research

approach is no longer considered a “soft” approach only useful in speculative research; it now enjoys an equal footing with the quantitative approach (Goulding, 2004:295).

Hancock (2002:2) explains that qualitative research describes social phenomena as they occur in their natural setting and makes no attempt to manipulate the situation under study as the more experimental quantitative approach does. Therefore qualitative research usually focuses on the in-depth understanding of a natural phenomenon whilst the quantitative approach focuses mostly on theory testing.

This research is located on the qualitative end of the qualitative-quantitative continuum because it focuses on the “quality of experience and actions as lived by persons” (Fischer, 2006: xv). The qualitative approach was therefore found to be the more appropriate of the two to investigate the behaviour and activities of individuals so as to gain a deeper understanding of them. The qualitative approach also allows for different views of the theme of study as it allows the participants a more open-ended way of expressing their views and demonstrating their actions (Henning et al., 2004:3). This approach was found as the most appropriate in this study that sought to examine relevant factors in the Zimbabwe-South Africa teacher migration phenomenon. The qualitative research approach allowed participants to freely express their opinion unfettered by the researcher’s preconceived categories. In this way they were able to freely discuss the various pressures they experienced and which eventually led them to decide to migrate.

#### **4.3.1 Research Design**

The qualitative research approach is distinguished by a number of research designs. A research design is an argument for the logical steps which need to be taken to link research questions and issues to data collection, analysis and interpretation in a coherent way (Hartley, 1994:226). For Birks and Mills (2011:24) a research design is a blueprint for the study and it must identify the philosophical and methodological positions that are to be employed in the research in order to reach the set objectives. The five main types of qualitative research designs identified in research literature are: case study, phenomenology, ethnography, historical research and grounded theory (Wert, Charmaz, McMullen, Josselson, Anderson, & McSpadden, 2011; Probert, 2006:2). The research design adopted for this study is grounded theory and this design explained in greater detail below.

### **4.3.2 Grounded theory design**

Grounded theory design is regarded as an attempt to generate theory from data collected so as to explain the process or phenomenon under study. Theory is a web of related concepts that together attempt to explain a phenomenon under study (Goulding, 1999:7). Goulding (2004:295) explains that the theory in grounded theory is referred to as grounded because “it is a theory grounded in the words and actions of individuals under the study.” Therefore grounded theory is theory rooted in the data which is why it is said to be grounded. Ellis and Levy (2009:328) define grounded theory research design as a systematic qualitative research procedure that is used to build a theory to explain a process, an action or an interaction and it is used when the existing theories cannot adequately explain the phenomenon under study. However Creswell (2008:396) maintains that grounded theory design is a systematic procedure used to generate theory that explains, on a broad conceptual level, a process, an action or interaction about a substantive topic. Charmaz (2011:165) views grounded theory research design as a systematic and yet flexible method that emphasises data analysis, involves simultaneous data collection and analysis, uses comparative methods and provides tools for constructing theories. Grounded theory design is therefore a logical and inductive qualitative procedure that seeks to generate a theory to explain a process from collected data. The design is referred to as grounded theory because it culminates with an explanatory theory that grows out of the data.

Grounded theory design is distinguished from other qualitative designs by the fact that in grounded theory the researcher is involved in data analysis while collecting data and uses the data analysis to inform and shape further data collection (Charmaz, 2006:187). It is therefore distinguished from the traditional research designs by the integration of the data collection and data analysis phases which are usually distinct in traditional research designs.

### **4.3.3 Philosophical underpinnings of grounded theory**

Grounded theory research has its roots in symbolic interactionism which holds that individuals engage in reflexive interaction as opposed to having a passive response to the environment (Goulding, 2004:295). The use of verbal and non-verbal symbols is intrinsic to symbolic interactionism, hence its name. Corbin and Strauss (1990:418) outline two

philosophical principles of grounded theory research that are derived from symbolic interactionism and pragmatism. These are that:

- i) phenomena are not conceived as static but as continually changing in response to prevailing conditions; and
- iii) actors are seen as having some measure of control over their destinies by their responses to conditions.

These principles make grounded theory ideal for uncovering how actors under investigation actively respond to conditions and help to uncover these same conditions (Corbin and Strauss, 1990:418).

Since grounded theory design seeks to uncover how the actors under investigation actively respond to their conditions and to unravel or expose these conditions, it was found to be an appropriate design for this research. The current project seeks to uncover the factors that compel Zimbabwean teachers to migrate to South Africa and develop a theory from the data collected that can explain this phenomenon. Grounded theory often attempts to understand the world of the participant from the participants' perspective (Birks and Mills, 2011:66). This made it appropriate for this study which sought to give voice to the migrant teachers.

#### **4.3.4 Constructivist grounded theory design**

Three key types of grounded theory designs are identified in qualitative research literature (Creswell, 2008:333-440; Ellis and Levy, 2009:328). These are:

- i) Systematic design in which the data coding steps of open, axial and selective coding are used for the development of a logical paradigm or visual picture of the generated theory.
- ii) Emerging design in which no specific preset categories are used but the theory is allowed to emerge from the data. The emerging design is therefore more flexible and less prescribed than the systematic design.
- iii) Constructivist design in which the focus is on meaning ascribed by the actors to a certain phenomenon. This approach is more interested in the views, values, beliefs,

feelings, assumptions and ideologies of individuals than in gathering facts and describing them.

Attention is now given to constructivist grounded theory which was the research design type selected for this study.

Constructivist grounded theory arose as a revision of the original grounded theory design formulated by Glaser and Strauss in the late 1960s and one of its main proponents is Kathy Charmaz. She explains that constructivist grounded theory rejects the earlier assumptions of grounded theorists such as the possibility of an objective and authoritative observer, the existence of an external and objective reality, and the treatment of data without acknowledging the participation and standpoint of the researcher in shaping the data (Charmaz, 2011:168). She affirms that constructivist grounded theory endorses the existence of multiple realities, that data in grounded theory research is mutually constructed by the researcher and the participants, and that neither the data nor its analysis is neutral but that both reflect the positions, conditions and contingencies of their construction. Charmaz and other constructivist grounded theorists therefore reject the epistemology of the original proponents of grounded theory research and adopt a relativist one whilst still endorsing the original grounded theory research strategies (Charmaz, 2011:168). The constructivist stand forces the researcher to be reflexive towards the research process and product and to consider how their theories evolve (Charmaz, 2011:131).

#### 4.3.4.1 Constructivist philosophy

The philosophical underpinnings of constructivist grounded theory lie in constructivism. Constructivism is a wide philosophical field in which the main uniting principle is the constructivists' opposition to naturalist belief in the existence of a real world that can be discovered (Moses and Knutsen, 2007:190). At an ontological level the constructivist posits that the world is both material and social and that the world appears different to different observers, especially its social component. Its appearance varies with the contextual setting and is influenced by gender, temporal, ideological, and cultural and other aspects (Moses and Knutsen, 2007:190). Epistemologically, this translates into the belief that knowledge about the social world is always knowledge in context, socially situated, with social consequences

and the strong link between knowledge and power is acknowledged (Moses and Knutsen, 2007:193).

On a methodological level, constructivism defines how a constructivist researcher relates to the participants as core-creators of knowledge and rejects the notion of neutrality, thereby forcing the researcher to face and account for his own biases (Charmaz, 2006:131). In this way constructivist methodology uses tools and approaches that can identify socially constructed patterns in the world and understand them in a context that gives them meaning (Moses and Knutsen, 2007:194). The research design focuses on meanings ascribed by participants with regard to their views, values, beliefs, assumptions and ideologies, as opposed to a simple gathering and describing of facts (Creswell, 2008:439).

The philosophical position was found appropriate because of my belief in the co-creation of realities and rejection of the existence of an objective reality waiting to be discovered. It was also appropriate as I sought to give voice to the participants themselves, the migrant Zimbabwean teachers. A brief description of my role as researcher and personal characteristics will now be provided.

#### **4.3.5 Position of the researcher**

I am a former Zimbabwean teacher, teacher-educator and university lecturer who is temporarily resident in South Africa where I am teaching Mathematics at a secondary school whilst doing my doctoral degree. My position as researcher allowed me extensive access to participants for the collection of qualitative data. This meant that I was not an objective, authoritative, neutral observer. Consequently, personal bias, values and assumptions are part of the reported findings. Open and honest relationships were developed between me and the participants. As the researcher, I was the agent of analysis and interpretation. My position and shared experiences with participants facilitated my entry into their world and encouraged effective participation through a common frame of reference. No perceived difficulty was experienced in entering the frames of reference of migrant teachers or of Zimbabwean nationals and so experiences and opinions were easily and freely shared.

Identifying biases, personal values and interests regarding the research topic and process, and explaining how entrance was gained to the research site and how ethical issues were dealt

with was crucial for the trustworthiness of the research findings. These were identified and acknowledged (Creswell, 2008:184), since failure to do this would have affected the analysis and interpretation of the data and led to invalid and unreliable conclusions. This was particularly important because of the possibility of a predisposition to a particular outcome or a subconscious search for a predetermined result (Opie, 2004:103, 118).

#### **4.4 RESEARCH METHODOLOGY**

##### **4.4.1 Sampling**

Theoretical sampling is one of the distinguishing characteristics of grounded theory. Birks and Mills (2011:69) describe grounded theory sampling as “theory driven” meaning that each session of data analysis informs the sampling for the next data collection session. For Charmaz (2011:167) theoretical sampling means sampling to fill out and check the properties of a tentative category and does not seek to achieve demographic representation of those chosen. In theoretical sampling the aim of the researcher is to develop the properties of his or her developing categories or theory, therefore he or she seeks people, events or information to illuminate and define the boundaries and relevance of the categories (Charmaz, 2006:189). Whilst theoretical sampling ensures that only data-rich sources are sought, it suffers the disadvantage that it is not possible to know from the start how many participants or data sources will be used, nor the nature of the data that will be needed to develop the grounded theory. Neither do you know beforehand when, where or how you will generate or collect your data (Birks and Mills, 2011:70). All this can be an impediment to the planning and smooth execution of the research.

In this study the criteria for inclusion as participants was that they should be former Zimbabwean teachers now resident in South Africa who had migrated within the past five years with the aim to seek a position in a school. The purposive sampling process required that one data-rich participant who met the criteria be identified first (McMillan and Schumacher, 2006:320). Thereafter snowball sampling was followed. This is the technique where successive participants are named by a preceding individual (Schumacher and McMillan, 2006:321). Participants thus identified fitted the criteria for inclusion, however, they did not necessarily hold the same views about the topic as the person who had made the referral. My status as a bona fide postgraduate student and my Zimbabwean citizenship

facilitated these introductions and all participants courteously agreed to engage in what they considered a worthwhile project. Thus, my relationship with all participants was marked by rapport and trust. Since the sampling method adopted was theoretical sampling which is a theory driven and purposive method of sampling, it was not possible at the beginning of the research to know the number of participants who would take part. It is the theoretical saturation of data that determines when the sampling and data generation should cease (Creswell, 2008:442) (see 4.5.3.2). Eventually, thirteen participants took part (see Table 4.1).

For identification, the participants were allocated codes in the form of a letter and number. These codes were not related to their names but to the stage of the research at which they first participated. This was done in order to maintain anonymity. In describing the participants a balance had to be struck between achieving a vivid description of the participants and keeping the participants' identity confidential. Table 4.1 provides a summarised description of the bio-data of the participants.

**Table 4.1 Summary description of the participants**

<b>Code Name</b>	<b>Gender</b>	<b>Age Group</b>	<b>Teaching Experience</b>	<b>Post Level</b>	<b>Province in the RSA</b>	<b>Years in the RSA</b>
A1	M	45-49	15	P	GP	4
A2	M	40-44	12	H	GP	4
A3	F	30-34	5	H	GP	3
A4	M	40-44	13	H	GP	3
A5	F	35-39	8	P	GP	4
A6	M	45-49	15	H	GP	4
B1	M	40-44	14	H	GP	4
B2	F	25-29	7	H	NC	4
B3	F	30-35	2	P	MP	3
C1	M	45-49	14	H	GP	4
N1	F	40-44	16	H	NW	2
R1	M	30-35	8	H	GP	4
R2	F	25-29	5	H	MP	2

**Key**

<b>F</b> Female	<b>M</b> Male	<b>GP</b> Gauteng Province
<b>H</b> High School	<b>P</b> Primary School	<b>NW</b> North West Province
<b>WC</b> Western Cape		

Of the 13 participants, six were female and seven male, providing a more or less equal gender distribution. The participants were between 25 and 49 years old and had an average of 10 years teaching experience. Of the 13 migrant teachers only three were trained to teach at primary school level; one of these was employed as a teacher at this level in South Africa, one was working as a waitress and the other was unemployed. In total 11 of the 13 participants were employed as teachers. Each participant had spent an average of three years in South Africa and the majority were resident in Gauteng Province at the time of the study.

**4.4.2 Data generation and collection**

Birks and Mills (2011:73) state that the difference between data generation and data collection is considered to be arbitrary but clarify that the difference between the two concepts is how the researcher positions himself or herself with respect to the data production. In cases where the researcher actively initiates the production of data, the grounded theorists speak of data production; data collection refers to the situation where the researcher merely gathers and utilises existing data.

Grounded theorists (Corbin and Strauss, 1990:418; Goulding, 2004:296) agree that there are many sources of grounded theory data. Solicited documents such as life narratives and interviews are included in these. Just as there are many sources of data in grounded theory research design, so there are many methods of data generation and collection. Some of these are common to other designs both qualitative and quantitative.

**4.4.3 Research methods**

Birks and Mills (2011:4) state that research methods in grounded research are “practical procedures used to generate and analyse data.” They further argue that there is a set of methods that are essential and must be used in order for the final product to be considered grounded theory. The two methods of data generation and collection that were deemed

appropriate for use in this research are: written life history narratives and interviews. The ensuing section is an outline of how the grounded research methods were employed in this research to develop a theory to explain the migration of Zimbabwean teachers to South Africa.

#### 4.4.3.1 Phase one: written and oral life histories

In this first phase data gathering through written and oral life histories was used. I initiated the production of the data by asking the participants to choose between writing an account of their life in a narrative focussing on their migration, or giving the account orally in a loosely structured interview. Written narratives are considered a modification of the in-depth interview (Bouma and Ling, 2004:179) hence my decision to allow the participants to choose either one or the other at this stage. The advantage of the written life narrative is that the participants are afforded a chance to write their life stories in their own way and thus stress what they consider important events without the researcher's interference (Bouma and Ling, 2004:179). However, the interview can afford the researcher better control of the data gathering process (Charmaz, 2006:28). I regarded teachers as people who would be comfortable with both written narratives and the interview method since written and oral skills are both required in their profession.

The interviews ranged from 60 to 90 minutes and were recorded on a digital voice recorder. The voice recorder was used in the interview, allowing me the freedom to write down any pertinent observations about the participants' body language and surroundings down. Bouma and Ling (2004:179) observe that using a voice recorder in an interview enables the researcher to replay it as many times as is required. They also note that transcribing interviews is a lengthy process and see this as a major disadvantage compared to note taking as a way of recording an interview. In this study I transcribed all the interviews and although time-consuming, this opened the way for my further immersion in the data.

The written life narratives had to be at least one and a half A4 pages if hand written or one typed page. Three participants eventually opted to write their life narratives. The written life narratives did not prove to be as popular with the participants as I had expected; most of the participants preferred instead to be interviewed because they felt it was faster and they found it easier to talk than to write about their experiences.

#### 4.4.3.2 Phase two: Follow up interviews

In the second phase all 13 participants were interviewed; that means the 10 participants who were interviewed in phase one were interviewed for the second time and the 3 who produced written narratives were interviewed for the first time. As the data generation and collection progressed and some common codes began to emerge in the concurrent data analysis of the interview transcripts and narratives, it became imperative to use a much more directed way of exploration. An intensive interview was seen as the best option. This interview was used to pursue the codes and explore categories that had arisen in analysis thus far. The duration of this second interview ranged from 15-40 minutes depending on the participant's feedback. Charmaz (2006:28) agrees that an interview can be used by the interviewer to gain more control over the theory construction than most other methods including textual analysis as it can be focussed on specific issues and it allows the interviewer to follow certain leads that might have arisen in analysis.

As an interviewing strategy I adopted Charmaz's (2006:25) intensive interviewing model which acknowledges that an interview is a directed conversation which also "allows in-depth exploration of a particular topic with a person who has had the relevant experiences." Intensive interviewing was found to be appropriate because salient issues from the concurrent interviews could be investigated thoroughly using relevant data rich participants. Charmaz (2006:26) maintains intensive interviewing allows the interviewer to, amongst other things, accomplish the following:

- i) Go beneath the surface of described experiences.
- ii) Stop and explore a statement or topic.
- iii) Ask about the participant's thoughts, feelings, and actions.
- iv) Keep the participant on the subject.
- v) Restate the participant's point to check accuracy.
- vi) Use observational and social skills to further the discussion.
- vii) Respect the participant and express appreciation for their participation.

Interview schedules (Appendix A) allowed me to ask both pre-planned and additional probing questions as the interviews evolved. All interviews were conducted in English and participants were asked to reflect on their migration experience. However, as a proficient

speaker of both Shona and Ndebele, I was immediately able to translate when the participants slipped into the vernacular using a word or phrase and so I had immediate access to the linguistic intention. Moreover, my shared nationality allowed me to access any cultural references that were appropriate to the context of Zimbabwean society.

#### **4.4.4 Data analysis**

Data analysis in grounded theory is interwoven with data collection and sampling. Corbin and Strauss (1990:418) state that one of the canons of grounded theory is that data collection and analysis are interrelated processes. Data analysis in grounded theory is unique in that it is done concurrently with the data collection and informs the sampling. This is opposed to other forms of qualitative analysis where data is analysed only after its collection is complete (Corbin and Strauss, 1990:420).

In this study data analysis proceeded through coding. Coding in grounded theory is the process of defining what data is about and codes are not preconceived but are developed as the researcher examines the data (Charmaz, 2011:187). Codes are a form of short hand that a researcher repeatedly uses to identify conceptual re-occurrences and similarities in the patterns of the participants' experiences (Birks and Mills, 2011:95). Codes tackle the issue of what is happening in the data and what the data means (Charmaz, 2006:45).

Grounded theorists usually distinguish two or three coding steps in data analysis. Charmaz and Bryant (2011:303) talk of initial and focussed coding, Corbin and Strauss (1990:422 ) talk of open, axial coding and selective coding whilst Glaser (1978) identified open and selective coding (Birks and Mills, 2011:95).

These steps were adopted in order to take advantage of the different formats of coding available in literature without being limited by any one particular model. However the synthesis made by Birks and Mills (2011:95-118) was used as the basis for the three steps. In the actual research process these steps were not followed in a linear manner since data analysis in grounded theory design is never linear, instead Charmaz (2006:58) asserts it goes back and forth through various stages.

#### 4.4.4.1 Initial coding

In this stage codes were used to break up the data obtained from the interview transcripts and the participant's biographies for analysis. The method of coding used was the line by line coding. This enabled me to get to grips with the data generated and in each line a name or label was allocated to actions and processes. Charmaz and Bryant (2011:303) say that line by line coding "is a heuristic device to prompt the researcher to study each line of data and begin to gain a conceptual handle on them." Holton (2010:24) notes that if line by line coding is done correctly it can eventually result in "rich, dense theory in which nothing is left out," and this is why this form of coding was adopted for this research.

Comparisons were made line by line, and codes allocated to name the recurrent incidents or phenomena encountered. Active codes were mainly used, that is verbs in their gerund form, as these are seen as the best form of codes to capture experiences of individuals (Creswell, 2008:439).

In the initial coding stage of this research the following key questions adopted from Birks and Mills (2011:96), Charmaz (2006:51) and Holton (2010:240) were kept in mind and used to guide the coding:

- i) What is this data about?
- ii) What categories does this incident indicate?
- iii) What is actually happening in the data? What processes are at play here?
- iv) When, why and how does the process change?
- v) What are the consequences of the process?
- vi) From whose point of view is it being seen?

In certain instances *in vivo* codes were utilised. According to Charmaz (2006:53), *in vivo* codes are those special terms used by the participant that can provide a useful analytical point of departure and are useful in preserving the participant's meaning of their actions. They can be symbolic markers of their speech and meaning. According to Creswell (2008:440), *in vivo* codes are labels for themes or categories that are phrased in the exact words of the participants as opposed to those of the researcher. Charmaz (2006: 53) warns that the *in vivo* codes must earn their way into theory just like any other codes that are used and that these

codes must always be regarded as problematic and need to be unpacked for implicit meanings and actions. *In vivo* codes were used in order to maintain freshness of categories and they contributed to the originality of the theory ultimately obtained.

The line by line coding though most useful in the very early stages of data analysis eventually becomes redundant as the researcher gains a sense of control over the data (Birks and Mills, 2011:97). It was at this point of redundancy of the line by line coding that I moved to the second coding phase, the intermediate coding stage.

#### 4.4.4.2 Intermediate coding

The initial coding separates the data into numerous codes; the intermediate coding stage assembles the data differently into categories. Categories are themes of basic information identified in the data by the researcher and used to understand a process (Creswell, 2008:442). Categorisation in grounded theory is the analytic step of choosing certain codes as having overriding significance or abstracting common themes and patterns in a number of codes and condensing them into an analytic concept (Charmaz, 2006:186).

In the intermediate coding stage of the research, the many codes that were generated by the line by line coding of the initial coding stage were grouped together by similarity to form categories which have an explanatory and conceptual aspect. Also the fusion of similar categories took place and some earlier categories were integrated into others, resulting in them becoming sub-categories of stronger categories. Constant comparison of data with codes, codes with categories and categories with each other meant that gaps and holes in the data were identified and theoretical sampling was employed to fill these gaps.

The three types of comparisons outlined by Holton (2010:25) were used in this stage. These are:

- i) Incident by incident comparisons were made in order to establish underlying uniformity and varying conditions of generated codes and categories and concepts.
- ii) Emerging categories, codes and concepts are compared to incidents and to more incidents to generate new theoretical properties of categories and generate new hypotheses.

- iii) Emergent categories are compared to each other to establish the best fit between them and to establish stronger categories through the collapsing of established but similar categories.

Continual comparison and the filling of data gaps continued until theoretical saturation was achieved for all identified categories. Theoretical saturation is used as a criterion to signal the end of theoretical sampling for a given category. Creswell (2008:442) maintains theoretical saturation is a point in which the researcher makes a subjective determination that new data will not provide any new information or insight for the development of the categories. Theoretical saturation therefore occurs when there are no more new codes identified in the new data collected that pertain to a certain category, this is usually an indicator that the category has been well developed to the extent where its dimensions and properties are clearly articulated and integrated (Birks and Mills, 2011:99).

In this research the emergence of a core category was pursued as it was viewed as a crucial element in the generation of dense and saturated theory and as a useful analytic tool to guide further coding of data. Holton (2010:30) notes that in classical grounded theory the emergence of a core category is an undisputable requirement. However constructivist grounded theory proponents like Charmaz (2006) are seen as attaching much less importance to the relevance of the core category. A core category is a concept that summarises the process apparent in the categories and sub-categories, and once a core category has been selected, theoretical sampling is then redirected to the generation of data that will theoretically saturate the core and related categories and sub-categories (Birks and Mills, 2011:101). The researcher can choose one of the categories (or sub-categories) and position it at the centre of the process being explored and then relate other categories to it (Creswell, 2008:434). Holton (2010:29) clarifies that the core category can be any kind of theoretical code; it could be a process, a typology, a continuum, a range, dimensions, conditions or consequences among other forms and its primary function is to integrate the theory and render it dense and saturated.

The guiding characteristics of the core category given by Creswell (2008:443) informed the formation and choice of the core category of this research. These are:

- i) The core category must be central and all others must relate to it.

- ii) The core category must appear frequently in the data.
- iii) The explanation that evolves by relating to the category must be logical and consistent.
- iv) The name or phrase used to describe the central category should be sufficiently abstract.
- v) As the concept is refined, the theory grows in depth and explanatory power.

In the intermediate coding stage the core category was identified and data generation and collection was then directed at its saturation and the saturation of the categories related to it. The demarcation of the end of the intermediate coding was the saturation of the core category and its related categories and sub-categories.

#### 4.4.4.3 Advanced coding

This is the final stage of grounded theory production. In this stage of coding the data eventually becomes theory and this is achieved mainly through theoretical integration. It is at this stage that the core category of this research was integrated with the other categories and sub-categories and this was achieved through the establishing of theoretical links between the main categories and sub-categories. Attention was paid to three important factors identified by Birks and Mills (2011:115) as necessary for theoretical integration. These are:

- i) an identified core category;
- ii) a theoretical saturation of major categories; and
- iii) an accumulated bank of analytic memos.

The core category was identified in the intermediate stage of coding and this strengthened and clarified the relationship between concepts within the theory. Theoretical saturation of categories is essential in ensuring that the categories become theoretically abstract and yet substantively grounded, making them an essential link between data and theory (Birks and Mills, 2011:115). The saturation of the core category and its related categories and sub-categories was done in the intermediate coding stage (see 4.5.5).

Memo writing is identified as one of the tools that are crucial for theoretical integration. Charmaz (2006:188) maintains memo writing is a crucial strategy in grounded theory which

forces the researchers to analyse and keep their level of abstraction high while also prompting them to develop their codes early in the research process. Holton (2010:32) views memos as theoretical notes about data and about the theoretical connections between categories. Jaccard and Jacoby (2010:268) identify three types of memos:

- i) Code memos, which are notes relevant to the creation of codes and categories.
- ii) Operational memos, which contain the directions of the evolving research design and data collection.
- iii) Theoretical memos, which focus on the theoretical propositions linking categories and variables.

Birks and Mills (2011:115) argue that memos are crucial in theoretical integration especially at the stage of advanced coding where the sorting out of the memos can aid in the integrative process through the identification of relationships and unifying concepts not previously evident. Therefore, in this study, memos were written from the beginning of field work and used as a reflective tool throughout thereby aiding the grounded theory formation. All three types of memos identified by Jaccard and Jacoby (2010:268) were used in this research. However most of the memos used were composite in nature as the researcher found it easy to write without limiting himself to one type of memo at a time.

#### **4.4.5 Presentation of findings**

The presentation of findings of this research revolved around the presentation and exposition of a grounded theory that aimed at explaining the migration of a small sample of Zimbabwean teachers from Zimbabwe to South Africa and explaining the core category, its sub-categories and the processes that link them. This forms the substance of the written report in Chapter 5.

Creswell (2008:443) identifies three ways of grounded theory presentation: a visual coding paradigm, a series of propositions or hypotheses and a story.

The visual coding paradigm is often associated with the systematic grounded theory design where a logical picture of the theory is generated by illustrative modelling. In this study illustrative models in the form of diagrams were developed to illustrate the grounded theory

(see Figures 5.1 and 5.2). The illustrative models were therefore used to clarify the analysis and the argument for the reader; it was also used to logically present the grounded theory (see 5.3). Birks and Mills (2011:139) view models as abstract representations of reality and they also mention that whilst diagrams are usually strategies of analysis, illustrative models are commonly used as strategies of presentation in grounded theory.

Presentation as a series of propositions or hypotheses is typical in the emergent grounded theory design. In this study illustrative models (Figure 5.1 and Figure 5.2) were used to offer a visual representation of the categories and their relationship (see 5.4). These propositions are illustrated by symbols in the diagram of the grounded theory (Figure 5.1) and the diagram of the core category (Figure 5.2). A written exposition of these propositions accompanies the diagrams to aid clarity and provide detail.

The story written in a narrative way was also used in this study. The description and discussion of the core category and its sub-categories as reflected in the lives of the participants followed a loose narrative structure elucidated and substantiated by rich data in the form of verbatim quotations from the written narratives and interview transcripts. The story was used as the main means of presenting the theory but was combined with elements of visual coding. Birks and Mills (2011:117) also recommend the use of the story as a method of presentation of findings and explain that the story, in grounded theory presentation, is a descriptive narrative analysis about the main phenomenon of the study and that the core category forms the story line.

The following questions adapted from Charmaz (2006:155) guided the theory presentation:

- i) Are the definitions of the core-categories and related categories complete?
- ii) Have the major categories, sub-categories and the core category been raised to concepts in the theory?
- iii) Have strong theoretical links been established between categories and between their properties and data?
- iv) How does the theory increase the understanding of the process (of the migration of Zimbabwean teachers to South Africa in this case)?
- v) With which theoretical or practical problem is this analysis most closely linked?
- vi) Who is the main audience of the presentation?

- vii) Is the presentation appropriate for the audience?

## **4.5 TRUSTWORTHINESS OF THE RESEARCH FINDINGS**

Researchers are not in agreement on a single criterion to use to evaluate the quality of qualitative research. The lack of attempt by qualitative researchers to address issue of validity in qualitative studies has been used by some researchers inclined to the positivist tradition to discredit qualitative studies

### **4.5.1 Validity**

In this study which can be classified as a qualitative grounded theory research that is informed by a constructivist epistemology, no attempt was made to adhere to the positivist criteria of validity. However effort was directed at finding what Gasson (2004:80) describes as “alternative notions of rigour that reflect the same notion of quality as those used in positivist research”. Corbin and Strauss (1990:424) state that grounded theory accepts the usual scientific cannons but redefines them carefully to make them appropriate to its specific procedures. Grounded theory researchers usually concern themselves with the trustworthiness of their results as opposed to validity which is an irrelevant concept to them. (Charmaz 2006:182). Hence for this research Charmaz’s (2006:182) criterion for evaluation of grounded theory studies which places the emphasis on four aspects of the research was adopted as a guide to maintain quality and guarantee the trustworthiness of research findings. These are: credibility, originality, resonance and usefulness. In the following section I briefly discuss each of the four aspects and review them vis-à-vis their impact on the trustworthiness of the results of this study.

### **4.5.2 Credibility**

Credibility in grounded theory research is about the “quality and sufficiency of the data for accomplishing the research goals.” It is however not easy to define what ‘solid’ data is and so the method through which data is obtained is usually the focus of attention (Charmaz and Bryant 2011:298). The iterative method that alternates between data collection, sampling and analysis and only stops when theoretical saturation is reached is an in-built measure meant to

ensure that enough data is collected before theory is constructed and any claims made. Strict adherence to the method was followed in order to improve the credibility of the study.

Under credibility the researcher also strived for “intimate familiarity” (Charmaz, 2006:182) with the setting and topic. The researcher, being a former Zimbabwean teacher now teaching in South Africa, felt that he was highly knowledgeable about the issues at stake and circumstances of the migrant Zimbabwean teachers in South Africa to claim to have the “intimate familiarity” with the settings. However this did not stop him from further investigating any claims made by the respondents.

### **4.5.3 Originality**

Originality measures the new insights that the categories used offer and the extent to which the grounded theory obtained extends, challenges or refines current ideas, concepts and practices (Charmaz, 2006:182). This research attempted to extend the understanding of the migration of teachers from Zimbabwe because very little research had been done in this area. It also aimed to refine the ideas uncovered. In order to ensure originality, it was necessary for the researcher to carry out an extensive review of literature so as to identify the research gap that this work is filling. However, the literature review was allowed to lie fallow during the field work and only utilised at the opportune time so as to avoid bringing into the research analysis preconceived codes, categories and concepts (see 1.5.1.1). The freshness of categories, which is another measure of originality, was guaranteed by the use of *in vivo* codes, some of which were elevated into categories (see 4.5.4).

### **4.5.4 Resonance**

Regarding resonance I concentrated on ensuring that the grounded theory made sense to the participants. In feedback sessions with the **participants their opinion** on the grounded theory was sought in a process akin to participant feedback. Resonance was also sought through the use of *in vivo* codes which are codes that are generated from the words and expressions used by the participants and so preserve the participant’s meaning and understanding of action (Charmaz, 2006:53). Some of these *in vivo* codes were upgraded to categories and sub-categories which definitely resonate with the participants as they are part of their language.

I guarded against introducing preconceived codes and categories into the research analysis and at all times tried to ensure that every code identified earned its place in the theory through iterative data analysis and theoretical sampling. This was to guarantee the emergence of a theory that is grounded in data. It is this grounding in data that should make the theory to resonate with the participants who were the main data sources in the research.

#### **4.5.5 Usefulness**

Usefulness is mainly about research contributing to knowledge and to the improvement of life in general. The research sought to generate an explanation of the migration of Zimbabwean teachers to South Africa. Such an explanatory theory would be important to human resources planning in the education system of both Zimbabwe and South Africa. It could also lead to the improvement of education in both but especially in Zimbabwe.

Although the grounded theory generated in this research is specifically about the migration of teachers from Zimbabwe to South Africa it could be useful in understanding the migration of other professionals. It could also serve as a starting point for research into the migration of different professionals not only from Zimbabwe but from other countries as well.

#### **4.5.6 Expert review**

The trustworthiness of the research findings was also boosted by expert review. As part of a doctoral research project, the researcher automatically benefited from the expert review of his supervisor who is highly experienced in qualitative research. The supervisor ensured the strict adherence to the iterative method of data gathering and analysis. This safeguarded the grounding of the theory in data and helped guard against the importation of preconceived ideas into the research.

### **4.6 ETHICAL ISSUES**

The guiding principle of the ethical stand in this research was Ubuntu a Southern African philosophy which advocates for the respect of human beings just because they are human beings (Gianan, 2010). I was of the opinion that the participants were doing me a favour and that I needed to be considerate to them. This personal philosophy was consistent with Ubuntu

and enabled me to respect the participants' culture and treat them as equal partners in the research. Bouma and Ling (2004:198) emphasise the need for the researcher to show respect for the research participants' culture so as not to foul the field. The ethical issues were handled in the following ways:

Negotiating access was done by asking each participant to sign a written permission letter before participating in the research. The participants each signed a consent form (see Appendix B) in which the aims of the research were clearly formulated, the activities they would engage in outlined, and the time these activities would take clarified.

Each participant was informed that he/she was free to withdraw from the research or data collection activity at any time. The participants were assured that they were free to demand that any data that they had contributed be destroyed on their withdrawal if they so wished. I explained that this right meant that they could refuse to answer a question that they did not feel comfortable with. Participants' involvement in the research was therefore based on informed consent since all aspects of what was to occur were explained to them and they were competent enough to make an informed judgement free from coercion.

Anonymity of the data was safeguarded through the use of pseudonyms (codes) instead of the real names of participants and institutions in the study report. Denscombe (2010:64) maintains that the main aspect of anonymity is the protection of the participants' names and their institutions.

Confidentiality of the information is about keeping the information private, and ensuring it does not fall into the wrong hands (Denscombe 2010:64). The research information was made accessible only to the study supervisor and was stored in my laptop only accessible through a secret password.

The data and the results of the findings were only used for the purposes of the doctoral thesis and for publishing a research paper in a journal. Care was taken to ensure that the participants were safe and free of physical, mental and emotional stress throughout their participation. The research carried no known or anticipated risks to the participants.

## **4.7 CONCLUSION**

In this chapter the research approach of the study was discussed, the research design and the grounded theory research design were outlined, and the appropriate research methods used for data generation and collection were stated and justified. The analysis of data through coding was discussed and the story-line presentation of findings was examined. Issues of trustworthiness of the research and relevant ethical issues were discussed.

In the next chapter a synopsis of the grounded theory is given. This is followed by a detailed exposition of the core category, status, and its sub-categories. A detailed description of each sub-category discussing its properties and dimensions follows. A comprehensive exposition of the processes embedded in grounded theory is then made. Finally, a discussion of the viability of Status as a core category, the efficacy of migration to alter status is made and an attempt is made to position Status in sociological and migration theory.

## **CHAPTER 5**

### **PRESENTATION OF RESULTS: THE GROUNDED THEORY**

#### **5.1 INTRODUCTION**

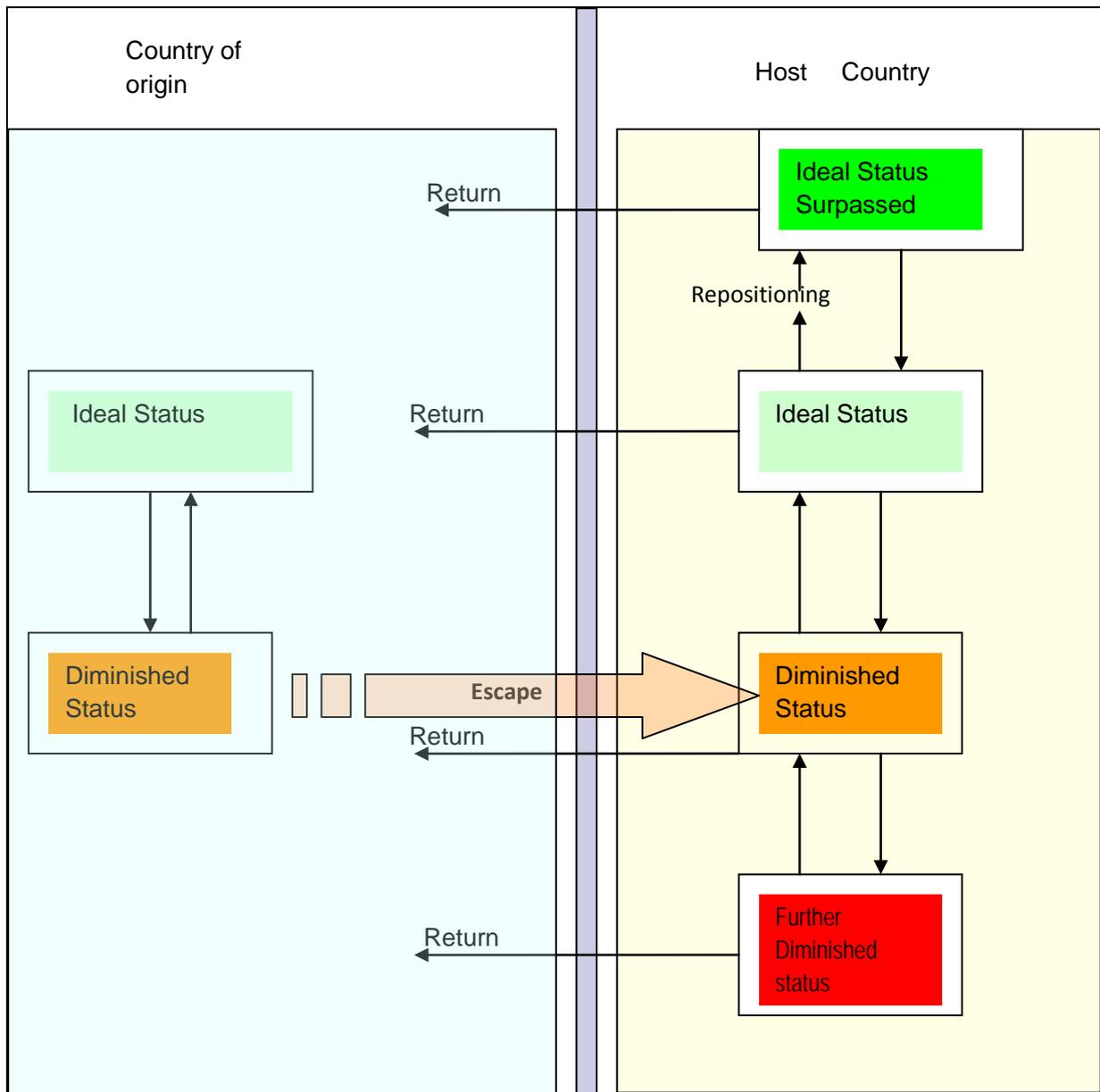
In the previous chapter the procedures for a qualitative inquiry was described and the grounded theory research design discussed. The constructivist strand of grounded theory which was found relevant for this study was presented and the ontological and methodological positions of the research explained. Specific data gathering and analysis methods used were explained and their choice for use in this study justified.

In this chapter the research results are presented. Firstly, a synopsis of the grounded theory is given (see Figure 5.1). A detailed exposition of the core category, Status, which forms the backbone of the grounded theory, as well as an exposition of its sub-categories and their inter-relationships (see Figure 5.2) follows. A detailed description of each sub-category discussing its properties and dimensions follows. After this a comprehensive exposition of the remaining categories in the form of processes embedded in grounded theory is made. Finally, a discussion of the viability of Status as a core category and the efficacy of migration to alter status is made, as is an attempt to position Status in sociological and migration theory.

#### **5.2 SYNOPSIS OF THE GROUNDED THEORY**

This section presents a synopsis of the grounded theory of factors influencing teacher migration from Zimbabwe to South Africa. Figure 5.1 presents an illustrative model of the grounded theory generated by the study (Creswell 2008:443; see 4.4.5). This is followed by the exposition of the model developed, paying special attention to all terms used.

**Figure 5.1: Illustrative model of the grounded theory: Factors influencing teacher migration from Zimbabwe to South Africa**



The grounded theory revolves around the core category: Status. Four sub-categories representing different forms in which the category Status exists were identified (see Figure 5.1 and Figure 5.2). These are:

- Ideal Status Surpassed
- Ideal Status
- Diminished Status
- Further Diminished Status

According to the grounded theory, the migration of teachers from Zimbabwe to South Africa concerns the attempt to achieve an Ideal Status. Ideal Status is understood as encompassing working conditions, a standard of living and social prestige that teachers as professionals regard as normative. In greater detail, Ideal Status is based on the teacher's perception and experience of the following aspects:

- i) Working conditions: such as salary, progression prospects, housing benefits such as housing on school sites or housing subsidy, transport in relation to location of school, medical insurance, pension benefits, teaching resources and teacher-pupil ratios, access to professional development and membership of professional bodies.
- ii) Standard of living: such as housing, service delivery such as provision of clean water, sewage and electricity, public transport, banking facilities, healthcare, public education and civic liberties such as unhindered participation in social and civic roles and events.
- iii) Social prestige: such as social standing and the respect teachers are afforded as professionals by society in general and by colleagues, learners and parents in particular.

The three aspects are interrelated and cannot be separated from each other. For example, having good working conditions implies a good salary, through which an acceptable standard of living can be maintained and the latter is related to social status and thus respect from the community.

In general, individual teachers have a mental construct of what the Ideal Status of the teacher as a professional should be. This is formed through conditions of service, observation and experience of professional practice, opinions of colleagues, parents, learners, education officials and other stakeholders in education, the representation of teachers in the media, public opinion and knowledge of the status of the teaching profession in other education systems. In terms of the grounded theory discussed here, the notion of the Ideal Status is formed against the framework of a teacher's lived experience of the working conditions, standard of living and social prestige which teachers, as an educated elite corps, have historically come to expect in Zimbabwean society and his/her perceptions of conditions enjoyed by teachers elsewhere in the world, especially in neighbouring countries such as South Africa.

Teachers strive to achieve the Ideal Status and may adopt several strategies to that effect in a process termed Pulling Things Together. These may include one or more of the following:

- Improving educational qualifications in order to position themselves for promotion and so enhance their status and chance of obtaining a higher salary.
- Actively seeking promotion by applying for posts and by agreeing to act in certain capacities, even for little or no remuneration, in order to gain experience.
- Involvement in income generation projects (e.g. small commercial enterprises, the offering of remedial tuition for a fee, cross-border trading and forming saving and shopping clubs).
- Seeking incentives through additional salary payments from parents. In the context of Zimbabwe teachers are purported to negotiate with parents in this manner to ensure that teachers stay in class and not engage in disruptive strike actions.
- Changing schools without improving post level in order to obtain other perceived benefits, such as employment in a prestigious school or in a school in a neighbourhood closer to their residence to save on transport costs.
- Obtaining a post in a private school that pays higher salaries or provides benefits such as free tuition for offspring, housing and transport.
- Bargaining and/or striking for higher salaries.

Endeavours to achieve or maintain Ideal Status become more crucial when Things Fall Apart, that is when personal and/or external circumstances deteriorate drastically. Things Fall Apart describes a situation in which various factors threaten achievement or the maintenance of Ideal Status and where the adoption of the strategies mentioned above become increasingly ineffective.

Thus, a teacher may decide to turn to migration as a final resort to improve Status. This is done by seeking a teaching post in another country where it is perceived that the Ideal Status could be achieved. Migration therefore is adopted by teachers whose status is threatened or has diminished. However, migration is neither the first option nor the only strategy open to the teacher as is evident in the list above. It is a strategy which makes high demands on the individual and most teachers will only consider and adopt migration as a strategy when

problems accumulate and reach a certain breaking point. The type of problems which eventually lead to migration can be grouped into three broad problem areas:

- i) Economic factors: generally poor economic conditions in the country which lead to poor salaries.
- ii) Political factors: political uncertainty and the political victimisation of teachers.
- iii) Social factors: the collapse of service provision, crime and shortage of experts, such as doctors and engineers.

However, despite the accumulation of these problems, in many cases a personal crisis is still necessary to spur the teacher out of his/her comfort zone and start the complex migration process. Certain turning points or crises often occur before the final decision to emigrate is made. Examples of these are the death of a close relative, impoverishment, serious political victimisation, or the lure of a teaching post in South Africa.

In terms of the grounded theory, migration is experienced as an Escape, a term chosen for its emotive nuances as migration is both a physical undertaking and an emotional rupture with the homeland, extended family and friends. Teachers have to relocate themselves and their nuclear family (or leave members of the nuclear family behind) and move their possessions from one country to another. This is accompanied by intense and usually conflicting emotions ranging from relief as a result of escaping from distressing situation to anxiety about the future and doubts about the efficacy of migration as a way of solving personal and professional problems. Escape was the preferred option of all participants in this study who desired to achieve an Ideal Status after experiencing a reduction in status in their home country, Zimbabwe. However, the achievement of Ideal Status is not an automatic outcome of Escape and migrant teachers face the risk of further setbacks if their situation fails to improve post-migration. In this case, they may end up in a position worse than the one from which they escaped in their country of origin. This is termed Diminished Status or Further Diminished Status. A common cause for this is the failure to secure a suitable teaching position that can sustain the migrant teacher financially. This situation is exacerbated by a number of problems including difficulties with legal documentation (e.g. the failure to obtain work and residence permits), finding themselves under-qualified to teach in the South African education system and the struggle to secure suitable accommodation.

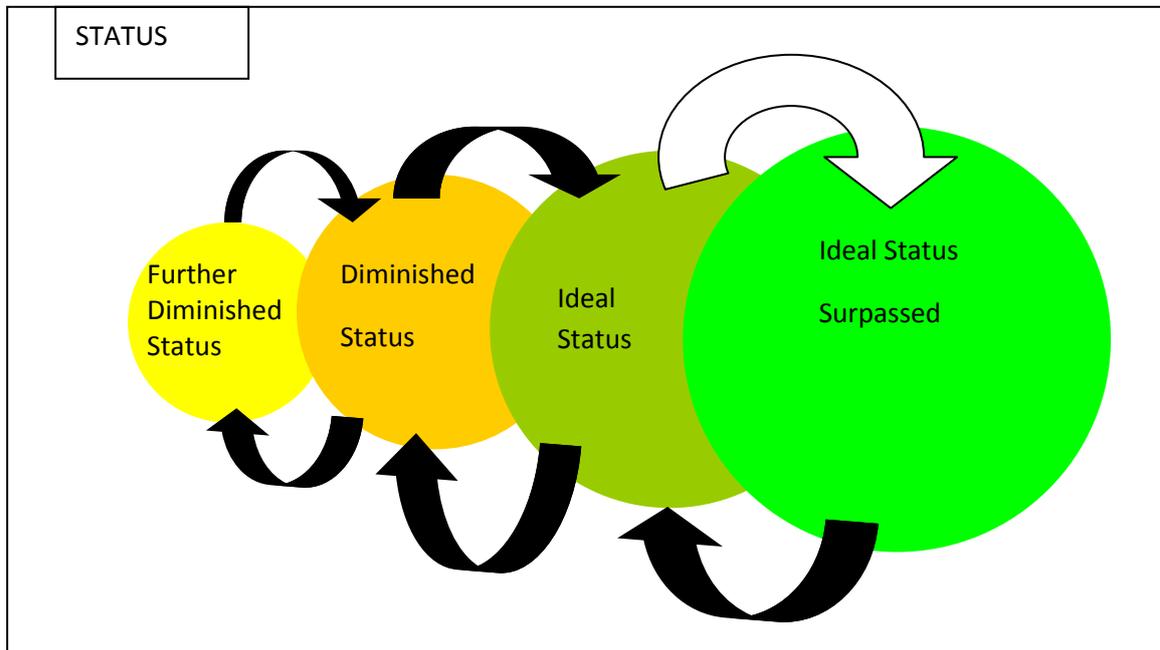
Post-migration teachers may work their way up from either the Diminished Status or Further Diminished Status in the host country (South Africa) by once more employing or adapting strategies included in the process of Pulling Things Together and in time may achieve or restore Ideal Status. Although teachers may eventually achieve their desired status, this does not stop them from trying to improve their lives further. Through the process of Repositioning, migrant teachers who have achieved Ideal Status may aspire to and attain a higher status; this is referred to as Ideal Status Surpassed. Repositioning is bringing about improvements in one's living and working conditions to the point that the conditions required for Ideal Status are surpassed, and so a new status, Ideal Status Surpassed is reached. They therefore consolidate their new position and ensure that they do not easily slide back into Diminished Status in the host country or country of origin.

Return is a possibility that is always open to the migrant at any point of their migration process, but with the development in Status (either positive or negative), a different set of motivators operates which may work against a return. Return is understood as the relocation of the migrant teacher back to the country of origin to re-assume permanent residence and re-employment as a teacher. Although migrants may on occasion revisit their country of origin, permanent return is a far more serious event that is viewed as gravely as the initial emigration from the country of origin. Consideration of Return implies that the migrant must revisit and weigh the option of undergoing once again the practical upheaval and emotional turbulence involved in the initial migration process.

### **5.3 EXPOSITION OF THE CORE CATEGORY, SUB-CATEGORIES AND RELATIONSHIPS**

In this section a detailed description and exposition of the core category, its sub-categories and inter-relationships are presented to further elucidate the grounded theory summarised in paragraph 5.2. This exposition is done with the help of Figure 5.2 which illustrates the relationship between the core category and sub-categories as well as the processes involved in these relationships. The processes are discussed in paragraph 5.4. At certain points in this exposition reference is made to Figure 5.1 which is more comprehensive. The exposition is elucidated and substantiated by verbatim excerpts from interviews and written narrative data (see 4.4.5). This is typical of qualitative research.

**Fig. 5.2 The status continuum and interrelationships**



### **5.3.1 The core category: Status**

As mentioned in paragraph 5.2, the core category in the grounded theory is Status which can exist as any one of the four sub-categories:

- i) Ideal Status Surpassed
- ii) Ideal Status (which can exist in achieved form or as a mental construct)
- iii) Diminished Status
- iv) Further Diminished Status

Each of these sub-categories represents various forms in which status can exist and are therefore closely related. The status of a teacher defines the teacher's situation in terms of working conditions, standard of living and the social prestige enjoyed (see 5.2). The three main aspects of the core category, Status, are: working conditions, standard of living and social prestige. These three properties and their dimensions are summarised in Table 5.1.

**Table 5.1 Properties and dimensions of Status**

<b>Property of Status</b>	<b>Dimension of Status</b>
Working conditions	Poor to excellent
Standard of living	Poor to excellent
Social Prestige	Low to high

The variation of these dimensions from their most optimal point to their least ideal creates the variation in the Status continuum (Figure 5.2). Further Diminished Status, Diminished Status, Ideal Status and Ideal Status Surpassed lie on a continuum from left to right as shown in Figure 5.2 and represent different states of the core category: Status. The range of this continuum stretches from the most negative pole, Further Diminished Status to the most positive pole, Ideal Status Surpassed.

### **5.3.2 Ideal Status**

The Ideal Status in its achieved form is the concrete realisation of the concept of Ideal Status. Achieving the Ideal Status means the teacher perceives he/she has attained the normative properties of status which can be expected of a professional teacher as illustrated in Table 5.2. The Ideal Status can be achieved by various means including those strategies outlined in paragraphs 5.2 and 5.4.2.

**Table 5.2 Properties of the Ideal Status**

<b>Property</b>	<b>Ideal status</b>	<b>Achieved</b>
Working conditions	Good	Yes
Standard of living	Good	Yes
Social Prestige	High	Yes

The attainment of the above properties constitutes the achievement of the Ideal Status.

### 5.3.2.1 Evolution of sub-category, Ideal Status

Initial examination of data led me to develop a tentative code which I at first termed Ideal Conditions. The notion was of a normative picture of conditions which teachers could expect as professionals.

However, further reflection and the re-examination of data suggested that the participants added a value facet to Ideal Conditions which was more aptly described as Ideal Status. This emerging hypothesis about Ideal Status (rather than Ideal Conditions) was verified through direct questions to participants about ideal conditions as I attempted to saturate this possible sub-category. As I proceeded, I understood that participants used a description of normatively ideal conditions (working and living conditions and social prestige) to construct an expectation that was more nuanced. I recognised this as properties of status and as components of the core category, Status. Thus, the core category Status emerged and the term, Ideal Conditions, was subsumed in Ideal Status.

### 5.3.2.2 Exposition of Ideal Status

Participants mentioned indicators which they used to define their actual status and compared these with their expectations of a professional. Thus, they produced a self-evaluation of their status level. The comment: *“I have managed to achieve certain things... that I would have wanted to achieve”* (R1) was understood as an indicator that the Ideal Status had been achieved by this participant. Conversely, Ideal Status was also appraised in terms of an unmet expectation. A 3 said *“I did not like the fact that I was earning a salary that could not sustain me and my family.”* This indicated the expectation that a professional teacher should earn a salary that would sustain him/her and his/her family in a reasonable lifestyle.

Most participants, especially the younger ones, entertained the perception of Ideal Status as a goal to be pursued but not yet achieved. However, they were clearly aware of their current status relative to the ideal that they sought. A few older participants (A6, B1 and A1) who had already achieved and experienced the Ideal Status and had seen it diminish due to the particular circumstances in Zimbabwe, aspired to recover it. All participants shared the resolution to use migration as their main tool to achieve Ideal Status. The ensuing section

elaborates on participants' construction of the constituents of this sub-category: working conditions, living conditions and prestige.

**a) Working conditions**

Prior to migration participants aspired to and yearned for certain working conditions and had been engaged in negotiations with their employer, the Zimbabwean Ministry of Public Service, for some time in an attempt to achieve this. As professionals, who had undergone lengthy teacher training and had accumulated experience (see Table 4.1 in Chapter 4), they had expectations about the conditions of service, including: salary, promotion, progression possibilities, housing at schools, transport to school (seen in the light of different locations), provision of teaching resources and conditions within the classroom. They had a perception of what could be considered an acceptable salary and used this as the basis to complain or negotiate for better remuneration. In his appraisal of teacher salaries pre-migration, R1 said wryly, *“At the end of the day we were getting not peanuts but nutshells. Eventually we ended up sort of rendering a [free] service to the state.”* He felt that teaching amounted to a free service to the nation.

Participants expected promotions and progression through opportunities at different career points; these expectations were realised more slowly than were anticipated. As a result, living standards among the participants were compromised. C1 and A2 made the decision to migrate after realising that their meagre salary ruled out the prospect of the purchase of a car or securing suitable accommodation. C1 summarised these unmet expectations as follows: *“I was convinced I would never meet my aspirations within the country. In education I wanted to advance to a PhD, buy a house and a car.”*

Teachers who took time out to acquire further professional education in their field as a strategy to achieve Ideal Status returned to their schools with high expectations of promotion and quick progression only to have these expectations crushed as in the case of A2. Participants in remote rural schools expected these schools to provide adequate housing with running water and electricity. The provision of accommodation for teachers who are not from their locality is common practice among rural Zimbabwean schools. However, school-based accommodation such as cottages adjacent to schools, lacked water and electricity. B2 worked in a school that was an exception: *“The good part was that we had electricity unlike other*

*rural schools around.*” Participants disliked being observed gathering firewood from the forest, drinking water from wells and other open sources and using candlelight to mark exercise books. This was not only uncomfortable but lowered their prestige when they were observed to live in the same manner as the less privileged local people.

Participants (such as B3 and R2) also wanted safe and reliable transport to and from school. They complained about transport that dropped them so far from the school that they had to walk a long distance daily. A rural school teacher (B2) described the situation:

*Travelling was not an easy thing to do as the main road was 14 km away from the school and one had to walk that 14 km to get to the school after being dropped by a bus on the main road.*

Other participants living in the urban areas also had to walk long distances to school to save money in the face of diminishing salaries. A4 complained, *“One of the most frustrating... experiences is that I used to walk from Q [his place of residence] to P high school; as far as I know it’s a distance of more than ten kilometres.”*

Participants (C1, C3 and B3) also held certain normative expectations about classroom resources, teacher-pupil ratios and safety within the school as well as professional freedom in the form of freedom of speech and academic freedom. As professionals they resented political surveillance of their teaching and its content. B3 noted: *“People from the C.I.D.... [state security organisation] went to schools to listen and observe teachers and we no longer had freedom in our schools.”* The general feeling of the participants was that the ruling party, ZANU-PF (of Robert Mugabe) at the time suspected teachers of promoting opposition politics in the classroom and so deployed intelligence officers to schools to monitor them. B3 stated categorically, *“We want the human rights violation to stop.”* She felt her rights as an individual were violated when she could not converse freely with her peers and was forced to speak well of a government that, in her opinion, was failing dismally.

## **b) Standard of living**

Participants had certain expectations about the standard of living that professionals should be able to enjoy. Teachers expected a certain level of service delivery in specific service areas.

A recurring complaint was in the area of health services which was deemed poor by the participants. Electricity, running water, collection of refuse were some of the services that teachers (like B3, R2 and C1) expected in their communities; unfortunately they did not always get these services. R2 complained: *“You know when you have been away for some time you see these things even more clearly, rubbish at the corners, sewage water flowing, no electricity, ahh! It was another thing.”* Poor transport and poor services such as health services and a mortuary meant that *“It was hectic, even burying a person was damn expensive”* (B3).

### c) **Social prestige**

The teachers expected to fulfil social roles and participate in community rituals in a way deemed worthy of educated professionals; they regarded themselves as privileged members of their communities and extended families. Participants were very sensitive about social standing as a result of the historically privileged position that they expected to enjoy as educated professionals in a developing society. In this regard participation in burials of relatives, friends and neighbours and in the traditional rituals related to death was mentioned by 5 of the 13 participants.

Social prestige was eroded by several interrelated factors. Political victimisation which was sometimes in the form of hate speech directed at teachers through the public media made their social standing vulnerable. Poor remuneration meant teachers were not able to accumulate assets such as home ownership, good quality household possessions and a car or benefits such as enrolment of children in good schools or their own re-entry into professional education. These assets are indicators of the Ideal Status.

### **5.3.3 Ideal Status Surpassed**

In my development of the sub-category: Ideal Status, I posed the question, “Is Ideal Status ever fully achieved?” I had concluded that Ideal Status is achieved if the participants are able to reach a benchmark in their endeavour to improve their lives. However, the achievement of Ideal Status is not the end of the road; new horizons are perceived and the teachers see these as the next target to be pursued. And so they engage in activities which could eventually lead

to Ideal Status Surpassed. Surpassing the benchmark in each of the three properties mentioned in Table 5.3 indicates that Ideal Status Surpassed has been reached.

**Table 5.3 Properties of Ideal Status Surpassed**

<b>Property</b>	<b>Ideal status</b>	<b>Achievement</b>
Working conditions	Good	Surpassed (better than in Ideal)
Standard of living	Good	Surpassed (Better than in Ideal)
Social Prestige	High	Surpassed (Higher than in Ideal)

Attaining Ideal Status Surpassed is the result of the continued effort of participants to improve the three properties of status after achieving the Ideal. Post-migration Ideal Status Surpassed comprises an elevated view of the status of the migrant teacher in the eyes of the community of the home country, that is, the successful migrant has reached a status which far outstrips the norm of a regular teacher in the Zimbabwean system. More is expected of the migrant teacher because he/she has invested and risked much by embracing the migration strategy. He/she therefore is expected to achieve more than a regular teacher who has not taken this drastic step to improve circumstances.

The question arises as to what extent the Ideal Status should be exceeded before the status becomes the Ideal Status Surpassed. As a qualitative study, the assessment made by the participants from their own point of view was taken as a credible evaluation of whether their achievement to date was Ideal Status or Surpassed Ideal Status. This subjective assessment is considered valid in a qualitative study where the researcher seeks to understand the participants and their world from their own point of view.

#### **5.3.4 Diminished Status**

This sub-category of Diminished Status expresses the situation of the participants who have failed to achieve the Ideal Status either before or after migration. Conditions of employment, standard of living and social prestige are experienced as below par. Participants in this status

category post-migration felt that working conditions were not optimal, the standard of living was inferior to even that in Zimbabwe and that they had lost most of the prestige they previously enjoyed. Table 5.4 indicates the properties of Diminished Status.

**Table 5.4 Properties of Diminished status**

<b>Property</b>	<b>Ideal Status</b>	<b>Achievement</b>
Working conditions	Excellent	Diminished (Poorer than Ideal)
Standard of living	Excellent	Diminished (Poorer than Ideal)
Social Prestige	High	Diminished ( Poorer than Ideal

### 5.3.5 Further Diminished Status

At the extreme end of the negative pole of the status continuum lies Further Diminished Status which indicates a further slide into unfavourable conditions of work and living and a further decline in social prestige. Post-migration, the participants who fell into this category were those few who found themselves in a situation in South Africa that was far worse than the one they sought to escape in Zimbabwe. Teachers eventually ended up working in blue collar jobs, such as waiters, maids or security guards. Their conditions of work and living were most unfavourable and they lost a great deal of social prestige. A former teacher of English and Portuguese (B2) described her current Further Diminished Status:

*At the moment I am struggling as a waitress. In fact I don't get a basic salary. I earn from a commission and tips from the customers. This means if I don't go to work, then I don't have money.*

She saw as her only present hope the improvement of conditions in Zimbabwe so that she could return and resume teaching there. A former primary school teacher (B3) who had been working as an assistant in a boutique just before the time of data gathering explained that after she had a baby she had to her quit the job at the boutique since “my salary was the same amount wanted by the maid [childminder] so I thought; better stay home and take care of my son.” Some participants

chose to do menial jobs while they sorted their legal documents out and planned to resume teaching when this had been achieved.

Further Diminished Status may be seen as the deterioration of Diminished Status. As with all states on the continuum of status, Further Diminished Status is a potentially temporary position. Migrant teachers who fall into Further Diminished Status still have the possibility, however tenuous, to work their way out of this situation (Pull Things Together) and so attain an improved status. A2 is an example of such a scenario. He describes his initial experience as follows:

*I was actually reduced from an educator to a pauper, where I accepted any type of job from being a sweeper to a gardener, to someone who issued out some pamphlets for promotions for these stores. I had no choice.*

After acquiring the necessary documentation to legalise his position, he was hired as a business studies and accounting teacher and is currently so employed. As a result he has attained Ideal Status.

## **5.4 EXPOSITION OF THE PROCESSES**

The grounded theory includes five categories which together form a process through which Status can be altered both before and after migration: Things Fall Apart, Pulling Things Together, Escape, Repositioning and Return. These are discussed in detail in the following sections. The five processes are pictured in Figure 5.1 with the two opposite processes of Things Fall Apart and Pulling Things Together being only indicated as unlabelled arrows pointing downwards and upwards respectively.

### **5.4.1 Things Fall Apart**

The process of Things Fall Apart is characterised by threats to Status and is presented symbolically in the illustrative model as the downward arrow (see Figure 5.1). As already mentioned, factors that pose a threat to Status are concentrated in three main areas: economic factors (low salaries and general economic conditions in the country), political factors (political uncertainty, political victimisation of teachers) and social factors (the collapse of

service provision, crime, shortage of experts like doctors and engineers, *et cetera*). Economic macro factors such as the general performance and high inflation of the economy affects teacher salaries and salary increases. In Zimbabwe a shortage of cash and commodities to a great extent affected the status of teachers during the past decade. Political uncertainty, a volatile and unstable political situation (see 3.3.2 and 3.3.3) and direct political victimisation of teachers threatened teachers' safety in the work environment and hindered their bargaining effectiveness. This all resulted in deteriorating working conditions, depressed salaries and reduced prestige.

Initial coding for the factors impelling migration was the rubric: Reasons for migration. However, as I reflected on the intensity of the experience of participants, I moved from this initial code to the more comprehensive and descriptive theme, Things Fall Apart. Things Fall Apart is the title of Chinua Achebe's 1958 seminal work on post-colonial disintegration (Achebe, 1994). It was deemed an appropriate name for this theme as it depicts the loss of personal control that participants experienced as the compounded impact of economic, political and social factors overwhelmed their Status as teachers. In fact, A2 described his experience by saying "*things were falling apart.*" This phrase captured the individual's inability to exercise self-efficacy over his/her working life and living conditions and suggested the erosion of prestige. Participants were overwhelmed by financial distress, social ills and political persecution. Migration from Zimbabwe appeared to be the only reasonable way forward and Escape (see 5.4.3) was seen as a way to reverse the crisis, avoid further deprivation and regain a sense of personal control over destiny. Things Fall Apart was therefore adopted as an umbrella term to cover all causes for the Diminished Status of participants which resulted in their migration.

Although the overlapping and reciprocal nature of the causes of migration is acknowledged, for ease of understanding these are discussed according to three areas: economic, political and social.

**a) Economic demise**

Most pressing reasons for departure from Zimbabwe offered by participants pertained to economic issues. Political instability and international isolation, though not the only causes, had brought Zimbabwe's general economic state to the verge of collapse. Rampant inflation,

the non-availability of hard currency, the shortage of basic commodities and rapidly rising costs of living were chief among the complaints. “*The country had become a country of queues*” lamented B1. Teachers were unhappy about having to queue for long periods to withdraw their salaries from banks only to be faced with even longer queues in shops. At one time as the level of cash in circulation in Zimbabwe dwindled, the shops were almost empty of commodities.

This situation also affected teachers’ salaries, the inadequacy of which was the most common reason cited for professional dissatisfaction.

*What prompted my movement was that [pause] the money that I was earning; my salary was so low that I was unable to pay school fees for my children who were at boarding school. We had a child who was at university and the usual housekeeping bills also, such that we were now no longer able to afford... (A1)*

Poor salaries were therefore a root cause for several related problems. Teachers could not afford to educate their children as they wished, usually at good boarding schools. As educators themselves, providing a good education for their own children was a value that they held dear. Teachers were also unable to pay household bills which did not fit their perception of a teacher’s Ideal Status and undermined their credit standing in the community and general society. A participant explained: “*I wanted to lead a life where I would not be constantly worried about my and my family’s next meal. I wanted to secure the future for my children in terms of education and sustenance when I die*” (C1).

The situation within the country reduced the teachers’ ability to maintain a standard of living which they felt they deserved as professionals. This did not augur well for their prestige and from time to time they were the subject of malicious stereotypical jokes which highlighted the low prestige afforded the profession. One participant, R2, narrated how even the informal bus conductors could be heard from time to time saying “*I am as broke as a teacher*” or the informal foreign currency dealers boasting that they make enough to pay several teachers per month. This illustrates clearly how the teachers’ poor financial situation stripped them of social respect.

## b) Political environment

Considerable attention was devoted to the political situation by participants. Most participants felt they had been victims of political persecution by the youth aligned to the political parties. At the height of the recent political instability in Zimbabwe (i.e. the period prior to and immediately after the 2008 Zimbabwean presidential and parliamentary elections) some teachers in rural areas were forced to attend political meetings, sometimes in the middle of the night, where they were humiliated in front of their own learners and their parents and made to sing and dance. *“In rural schools some teachers were beaten badly and accused of misleading parents to support the opposition parties in the Pungwes”* explained participant B3. *Pungwe* refers to an all-night vigil or meeting; in this case these were political meetings in which political support was engendered.

Participants also accused the then ruling ZANU-PF (Mugabe’s party) of publicly denouncing teachers as a profession and attempting to turn society against them by labelling them *‘enemies of the state’* in the state-controlled media. *“Teachers were accused of supporting the opposition parties so we were always threatened here and there”* lamented R1. As in previous elections, teachers were used as polling officers in the 2008 elections. Because of this they were accused by ZANU-PF of having influenced the voters to vote in favour of the opposition candidate, Morgan Tsvangirai they were denounced in the state media. C1 said *“Hate speech on national radio and television was a daily thing.”* The persecution of teachers suspected to be supporters of the opposition by state security agents meant that participants did not feel safe even within schools. B3 observed: *“People from the CID [Criminal Investigation Department] went to schools to listen and observe teachers and we no longer had freedom in our schools.”* On her arrival in South Africa B3 expressed her relief as follows: *“I had escaped from danger of arrest and torture... I was not feeling safe at home or even at school.”* Political persecution also affected teachers’ social prestige, injured their sense of self-respect and undermined their authority as professionals in the classroom. *“I felt like a woman without dignity because of the way teachers were treated”* said one participant (B3) who felt stripped of her dignity by politically motivated persecution.

Political persecution was seen by some of the participants as having an indirectly negative effect on the wellbeing of the teachers because it meant they could not bargain freely for

better salaries. Any strike action that they embarked on was apparently perceived as a political action against the state.

*In some cases when teachers were trying to protest here and there. Some were arrested and some were intimidated to such an extent that no one was looking after teachers any more. The low salaries is a political factor so is their living conditions. (A4)*

This participant not only blamed the government for the intimidation of teachers but linked the poor salaries and living conditions of teachers to the restrictive prevailing political situation. N1 summed the situation up with these words: *“Teachers are suffering in that country because of politics and politicians.”*

I observed that in the interviews participants chose their words carefully when describing political events and experiences so as to avoid incriminating themselves. One participant (A6) was bold enough to state that he was politically active and had campaigned against ZANU-PF, but refrained from naming the ZANU-PF (Robert Mugabe’s party), referring to it only as *‘the other party.’* This is a tactic born out of self-preservation.

*Because the other party, what they used to do was, they would try to buy votes by giving to the community offering them hand outs, offering them feeding schemes... So we worked with the community trying to conscientise them saying ‘Ok, guys, you need to be objective. You need to open your eyes. This other party is offering you hand outs just to buy votes’.*

### **c) Social problems**

Social ills cited as motivation for migration included the collapse of social services, such as the provision of health services, rubbish collection and water and electricity supply. A participant (B3) worried about the state of health services: *“There was no medication in the public hospitals, X-ray machines were not working, all equipment in the hospital was not working.”* C1 adds *“The service delivery was unknown and rubbish accumulated in the street corners and... the rats in our houses!”* Electricity supplies were erratic. *“Shortage of electricity was the worst thing because people couldn’t afford to get any other means of*

*energy supply*” (B3). Zimbabwe suffers an acute shortage of electricity and has resorted to rationing the supply of electricity (News24, 2012). Poor municipal services pushed participants to emigrate, particularly the lack of safe water and sanitation which exposed residents to diseases, the worst of which was the cholera epidemic that swept the country from 2008 to 2009 (IRIN Africa, 2012), a case in point being C1 and B3.

The poor standard of education, especially in public schools, was given as a reason for migration. Teachers felt that they and their children deserved higher standards of education but in education, as in the case of most other services, the cost of good service was already out of reach of teachers. A frustrated A4 explained:

*[My] children remained in these local schools and the education was very, very much on the bad side as you know [in] these hot-seating schools, you don't get decent education for your kids.*

Hot seating is a colloquialism that refers to the platoon strategy whereby certain learners attend school in the mornings and another group attends school in the afternoons. This is common practice in Zimbabwe's public urban schools and was adopted as a measure to counter shortages in school infrastructure. As already mentioned teachers wanted to enrol their children in better schools like boarding schools or private schools which were highly resourced, but they could not afford to.

Further, participants explained that reduced status means that they were unable to fulfil social expectations and attend to community rituals. Attendance of funerals and the customary provision of financial and material support to the bereaved is one of the traditional social expectations of the black Zimbabwean communities and most teachers could no longer afford this. Participants were disappointed and ashamed that they could not care for their elderly parents and members of their extended family as required by their culture. *“It was very painful for me not to be able to look after them [my parents] and other relatives in their old age”* lamented R2, who felt her parents and relatives had sacrificed a great deal for her to become a teacher.

The theory also allows for the possibility that the process, Things Fall Apart, may occur in South Africa post-migration. However, the causes of this process will not be identical to

those in Zimbabwe; issues such as legal problems, accommodation and employment prospects have already been discussed under the headings: Diminished Status and Further Diminished status (see 5.3.4 and 5.3.5).

#### **5.4.2 Pulling Things Together**

The process of Pulling Things Together, which is activated by strategies open to teachers to achieve Ideal Status, is presented symbolically in the illustrative model (Figure 5.1) as an upward arrow. The endeavour to achieve Ideal Status or to resist Diminished Status can be activated by teachers through various strategic efforts enumerated in Paragraph 5.2, the sum of which has been termed Pulling Things Together. If successful, these can lead to an improvement in status and ultimately to an Ideal Status.

In the following section attention is primarily given to the participants' description of this process prior to migration from Zimbabwe. This accurately reflects the weight given to the process within the interview and narrative data. However, it is acknowledged that Pulling Things Together may also be activated by the newly settled migrant in the context of the receiving country, in this case South Africa. This would be an effort to secure the often precarious future of a migrant in a strange community and is pictured by the upward arrow on both sides of the Escape experience in Figure 5.1.

A comment is apt at this juncture regarding migration. As mentioned in the synopsis of the grounded theory (see 5.1), migration was indeed a strategy that teachers used to regain stability when Things Fall Apart. However, I felt that the gravity of migration as a type of final solution elevated it to a stand-alone category and hence it was discussed under the rubric, Escape (see Par 5.4.3) and not included in Pulling Things Together. Prior to migration all participants had at one time or another tried one or more strategies regarded as less radical than migration to improve their living and working conditions and prestige. I concluded therefore that migration was always preceded by various short-term endeavours by participants to regain professional, financial and social balance. As teachers encountered the growing challenges that would eventually cause them to Escape, they attempted to set in motion steps to achieve Ideal Status without resorting to as drastic a solution as migration; in other words they engaged in Pulling Things Together. This term also highlights the dynamic relationship of matched-opposites: Things Fall Apart and Pulling Things Together. The latter

refers to temporary and more moderate attempts to regain or keep control over various aspects of life in the face of threats to these resulting from financial, social and political stressors. The term suggests the individual's attempt to rescue or rehabilitate a situation that was spinning out of control.

A common strategy in this regard was to improve one's qualifications. A2 describes his effort:

*When I still had my diploma in education, life was very easy then, that was before 2005. Then from 2005 I realised that I had to upgrade my qualification and I had to do my B.Ed.*

Participants often saw acquiring a higher qualification as a solution since the employer, the Zimbabwean government, rewards further qualifications with a concomitant salary increase. Moreover, a higher qualification means that the teacher has a better chance of promotion which could translate into improved remuneration and an enhanced social prestige. However, A2 found this strategy inadequate. After improving his qualification he found: *"The salary and the cost of living was very difficult. I could not make ends meet."* Disillusioned, he turned eventually to migration to South Africa. Acquiring a higher qualification positioned teachers for promotion but so did volunteering to act in certain capacities such as deputy head (e.g. A1) in order to gain experience.

Teachers also resorted to a number of income generation projects to supplement their salaries; buying and selling and cross-border trading (A1, B2 and R2) featured prominently so did the offering of remedial teaching for a fee (A1, B1 and C1). Saving and buying clubs were formed. In these, teachers would save their monies as a lump sum in order for it to accrue higher interest and then buy groceries in bulk in order to save. One woman (B2) who worked in a rural school and took advantage of the fact that beef is usually cheaper in the rural areas as compared to the urban areas. *"I would buy meat (beef) in the rural areas and take it to town for sale and it sold very fast, on my way back to school I would buy sweets or something from town to sell to my children [learners] and neighbours"* she said. Teachers traded in various wares ranging from sweets to clothing and farm produce with one another, learners and the community surrounding the school in an attempt to supplement their salaries. Selling to school children within the school perimeter is prohibited by the law so some of the

teachers vended clandestinely. The pre-2009 agreement between the governments of Zimbabwe and South Africa, which allowed only Zimbabwean civil servants to obtain a visa at the border on production of a recent pay slip offered teachers an opportunity to increase their income through cross-border trading. The rest of the Zimbabwean population had to engage in a lengthy and costly (about US\$200 in early 2009) process of applying for a visa at the local South African embassy if they intended to visit to South Africa (Chagonda 2010:7). Cross-border trading is an informal business in which merchandise bought cheaply in one country is sold with a mark-up in another. Some civil servants, including some of the participants in this study took advantage of the inter-governmental agreement to engage in seasonal labour migration to South Africa to do ‘piece jobs,’ that is to work during school vacations doing casual jobs such as laundry, gardening, baby sitting and hair styling. When the holiday was over, they would trek back to Zimbabwe and resume their duties as teachers. B3, a particularly outspoken participant, described how it all worked together: “*Ja [Yes] sometimes I would also do piece jobs during the holidays to get money, order [buy ]this and that[merchandise] to sell at home [Zimbabwe].*” B3 would go to South Africa during her school holidays and get part time employment and then use the money she earned to purchase merchandise to resell in Zimbabwe.

Another temporary strategy to protect status was through generating parent contributions. Teachers in many schools, particularly in urban public schools, apparently canvassed as a group to compel parents to pay them money as ‘incentives’ to retain them at school, especially after the government had flatly refused to increase their salaries. Cross-border trading, and other income generation activities that the teachers were engaged in meant the teachers were frequently away from school or from their classes and learners missed out on teaching and learning. Incentives were a way to encourage the teachers to remain in class teaching. Understandably this practice was initially resisted by many parents who felt they were already paying teachers through the school fees.

Transferring to teach in a neighbouring school was another common strategy. A4 put it as follows:

*What I’m getting as my salary as a teacher could not afford my transport... then I transferred to [a school which was] a walk-able distance from my home area. So at least I solved my problem partly.*

Transferring to a nearby school meant A4 did not need to walk the 10km that he used to walk to and from school. Similarly other teachers (C1) adopted this strategy to save on transport costs. Other participants (like A6) sought to transfer to better paying schools. Usually private schools gave teachers retention allowances and other perks as incentives unlike public schools. The benefit of teaching in a private school ranges from the payment of tuition fees for the teacher's off-spring, free housing and electricity and access to loans amongst other things. But there are a limited number of private schools in Zimbabwe and this strategy could provide a positive outcome for only a few teachers.

Bargaining and even striking for higher salaries and allowances was an option that the teachers considered. However, it was not effective within the repressive and politically charged climate prevailing in Zimbabwe. A case in point is N1 who was dismissed from her job for allegedly inciting teachers to strike and for leading a strike. She was eventually cleared of the charges after a prolonged legal battle but could not resume employment in the same town that she lived instead she was deployed to the rural areas because her post had allegedly been filled by another teacher. Her frustrations eventually became the turning point that motivated her departure to South Africa. A4 also came to the conclusion that political interference in teacher unions eroded their bargaining power: "*even teachers unions like [name omitted] were apparently run by politicians.*"

### **5.4.3 Escape**

Migration was the common and unifying experience of all participants in this study. Most spoke passionately about the process of migration: the logistical problems of leaving one's country of origin and the emotions aroused by this movement. Initially I identified migration as a possible category; however further exploration of the turmoil surrounding the migration of teachers from Zimbabwe led me to choose the term Escape over Migration. Escape is defined as the avoidance of a harmful or unpleasant situation and is accompanied by some type of risk and exposure to danger. This term captured the nuances of the lived experience far better than the blander term, migration. This choice is substantiated by the stories of the participants as follows.

Faced with unacceptable circumstances, participants saw migration as an escape route and were prepared to face extreme odds in making this flight. *“But me? Did I have a passport? No! I did not. But... so what do I do?”* A2 expressed his utter confusion on realising that he had to leave the country but did not even have a passport or the means of acquiring one. Another teacher (A4) explained how he sunk into debt in order to secure a passport: *“So, I rushed into trying to process my passport, borrowing money at some times. I was even borrowing the Chimbadzo [a Shona term for borrowing from informal money usurers, often at exorbitant interest rates] money, whereby you have to pay back with interest.”* The cost of acquiring a standard passport in Zimbabwe has for some time been much higher than the regional average and out of the reach of the ordinary people (The Herald, 2011). Costs decreased from \$170 to \$140 in 2009 and from \$140 to \$50 in 2010 but still remain comparatively higher than those of neighbouring countries (The Herald, 2011). For A3, a female teacher in Zimbabwe’s capital city, Harare, migration was a matter of life or death as she tried to escape the dysentery and cholera epidemic gripping Harare. Her maternal instinct overrode other considerations: *“So I said, ‘Ah ah! [No no!] Let me leave with my kids just to protect them.”*

Escape does not preclude the element of planning, however. The migration process for most participants (7 out of 13) began with a meeting of the nuclear family. At these meetings the following were discussed: who should move first, what should be done with property in the home country, how disruption to the children’s education could be minimised, who could assist in the migration and provide funds, how to secure accommodation in South Africa, and where to gain information about and the logistics of migration and obtain the necessary documentation for migration and employment. Decisions about migration were therefore usually taken in full consultation with spouses and immediate family members and this was the case with A1, A4, B3. *“We sat down with my wife and decided things cannot go on this way forever”* explained A4. However, in some cases (e.g. A2) friends and members of the extended family were also consulted.

In order to escape, difficult decisions had to be taken like who would go first and who would stay behind. Spouses did not usually leave the country at the same time when the decision to migrate had been taken; usually the one who was in a better position to secure the necessary documentation, employment or accommodation left first. In most cases (e.g. A1, A3) only one of the spouses was a teacher and the teacher usually left first because of the known

demand for teachers in South Africa. “*So I came here for two months and I looked for accommodation and everything and then my husband followed with the kids*” explained a female participant (A3). However, there were cases (A2 and A5) where the non-teacher spouse departed first as he/she had relatives already in South Africa who could accommodate and assist them to settle and find jobs; the teacher departed later to join the spouse.

In this kind of decision gender relations also manifested. The few cases of unilateral decisions to migrate were exercised by men (A6 is a typical example), probably because men wield more power in family decision-making processes or because they feel responsible for providing for the family and so feel entitled to make unilateral decisions. A6 describes how he obtained his payslip at work, looked at it, quickly went home, packed his bags and left to the amazement of his wife and family. “[*I just took my bag talked to my wife and I just told her ‘I am going’ and she was shocked.*” He continued to describe his border crossing and the consequences of his impulsive action: “*When I obtained to the border, I crossed the border on foot and once I was on the other side, I managed to phone a friend of mine just say ‘I am now on the SA soil and I don’t even know where I am going’.*” A6 justified his impulsive action by saying he just realised he needed to do something urgently to save his family from starvation and other ills that might befall them through the lack of adequate income. Men (A4, A6 and C1) felt they shouldered more of the responsibility to provide for the family than their spouses and took it upon themselves to escape from untenable circumstances to be able to meet this responsibility.

The staggered departure of participants provided a safety net in case things did not go well for the migrant. In families with children, the parent who remained behind in Zimbabwe usually looked after the children. It was common (7 out of 11 had children) for migrant teachers to leave their children in the home country on a long term basis or for some time after migration. Four participants still had some or all of their dependent children resident in Zimbabwe at the time of the interviews.

Most migrants had to leave their families behind with scant basic resources and usually very little food (e.g. A1, A4, A6 and C1). Consequently, these participants constantly worried about those left behind and this heightened their anxiety about securing employment quickly so they could start providing for their dependents. “[*I was] thinking of the fact that those*

*conditions that sent me away are the same conditions that they have to sort of withstand...*” lamented A6.

The nature of escape can be seen in the way participants left their professional posts. Most abandoned their posts without formal resignation. Only a few (such as A3 and A5) formally resigned from their work in Zimbabwe before moving to South Africa. Those who did not resign (A1, A2, B1, C1 and A6) offered two main reasons for their action: a disregard for the present teaching position created by poor working conditions and/or the desire to keep a backdoor open in the case of failure to obtain employment in South Africa. With regard to the latter, B1 asked “*How can you resign before you secure another job?*” B1 wished to safeguard himself against unemployment by not resigning. In this case, even an unsatisfactory job offered some measure of comfort against an unpredictable future. With regard to the former reason, C1 said:

*There was no pension to claim, the employer could not pay us (salaries) let alone give us pension. I just did not have the time to waste on bureaucratic... issues [of resigning formally].*

The pension was often regarded as insignificant and just not worth the migrants’ efforts to pursue. And so a number of participants refrained from formal resignation which would have been a natural first step towards securing the payment of the pension benefit.

Yet the drive to escape an unpleasant situation and ultimately improve one’s status often required a precipitating event, the proverbial ‘last straw.’ At first, caution and even inertia kept some teachers from migrating at the earliest opportunity. Different events became turning points which drove teachers to migrate. A3 explained that she needed something to push her; even after A3 and her family obtained permits to live and work in South Africa, they did nothing with them for a whole year. The ‘thing’ that pushed them to leave was the death of a relative from suspected dysentery due to the unsanitary conditions which had developed in Harare. They (A3 and her family) realised they too could easily fall victim to dysentery. A3 described the situation in which Harare had experienced serious water shortages due to a breakdown in service delivery and was struck by a dysentery epidemic. This situation was exacerbated by a surge in the migration of medical personnel (see 3.3.4). The mortuaries were full or simply refused to take a dysentery victim and A3 narrated a

nightmare trip in which she had to drive around the city for hours with her aunt's corpse in the back of her van in search of a mortuary before giving up and making a decision to bury the corpse immediately. The funeral took place without any water on hand and risk of contagion was very high among the mourners.

*It made me realise that if any of my kids or husband got the dysentery, they were definitely going to die. So I said, 'Ah! Ah! Let me leave with my kids to just protect them.'*

The family made their 'escape' to South Africa almost immediately thereafter.

Political factors were also powerful stimulators, for example, the election farce was the last straw for C1:

*The turning point for me was the botched 2008 elections whose results were announced many weeks after the voting and were not believed not even by the most gullible.*

Zimbabwe held parliamentary and presidential elections in 2008 and the results of these elections were heavily contested (Sachikonye, 2011:45). The results of the first round of the presidential elections which were held on the 29 March 2008 were withheld for more than three weeks. On their release there was no outright winner between the incumbent president, Robert Mugabe and his main challenger, Morgan Tsvangirai and a run-off election was necessary. However, Tsvangirai had to stand down before the run-off election because of the widespread violence unleashed by Mugabe's supporters and Mugabe won by default as he remained the sole candidate in the run-off (Sachikonye 2011:45-60). In the wake of these events C1 redoubled his efforts to migrate and despite his fear of the xenophobic attacks on foreigners occurring in South Africa at the time, he departed a few months later. In May 2008 South Africa experienced one of the most brutal attacks on foreigners perpetrated by its nationals in which over 60 lives were lost (Southern African Migration Program (SAMP) 2008:11) (see 3.2.3); among the dead were a sizeable number of Zimbabweans.

A rather different case is that of A4 whose trigger for escape was the pull of bright prospects of employment in South Africa. A phone call from a relative in South Africa telling him that

Zimbabwean mathematics and science teachers were being hired in the Limpopo Province of South Africa spurred A4 into action.

Escape involves the endurance of discomfort in the effort to avoid distress. For many participants the journey to South Africa was uncomfortable and arduous. Most did not have the personal means to travel by car nor could they afford other comfortable means of transport. Only one participant, a woman (A5) who migrated in order to re-unite with her husband flew with her children from Harare to Johannesburg. One other woman was able to drive from Harare to Pretoria (more than 1000 km). The rest had to use the cheapest means of transport available to cover well over a thousand kilometres to their destination. *“I didn’t have enough money to see me to South Africa; the salary was not enough to see me to South Africa”* lamented A4. One participant reports, *“I used one of these so called chicken buses and I was surprised it obtained to Jo’burg [Johannesburg] without a problem.”* A ‘chicken bus’ is a derogatory name for the uncomfortable and usually mechanically faulty bus used by the poor in Zimbabwe because they are cheaper.

Once across the border the migrants had to deal with the issue of accommodation. Although it is safe to assume that they had made some arrangements for accommodation (usually with friends or relatives) before crossing the border, things did not always go according to plan. For example, A1 had to be content with unsuitable accommodation with his brother-in-law’s rowdy friends as that was his only haven. B2 also had to put up with noisy neighbours in a rented room and her move to other premises exacerbated her plight as in the new quarters she was robbed by the landlord.

On arrival in South Africa, migrants suffered loneliness and homesickness and, at times, a cultural shock. *“Ayiii! [exclamation] things were so new and so different from what I was used to back home”* exclaimed A1 who found life in urban South Africa to be far different from the one he was used to in the small town where he taught outside Zimbabwe’s capital city, Harare. His conservative lifestyle differed from the raucous friends and relatives who would drink and argue sometimes deep into the night.

Relief and feelings of safety were also part of the emotional package, especially for those who had allegedly escaped political persecution in Zimbabwe. *“When I arrived in S.A, I felt like a heavy load was taken off my shoulders”* says a lady teacher (B3). She had lived in

constant fear of arrest as she was perceived as a supporter of the ‘wrong’ party that is the Movement for Democratic Change (MDC headed by Tsvangirai). Another woman (B2) experienced an emotional see-saw when she arrived for the first time in the beautiful city of Cape Town straight from rural Matabeleland, Zimbabwe: “*On arrival I thought it was the beginning of paradise for me but hell broke loose when I was told I am still illegal in the country until I get refugee papers.*” Cape Town’s beauty appeared like a paradise to this participant but this surreal world came crashing down when she realised that she was an illegal migrant liable for arrest and deportation.

Thus, the findings indicated that the migration of teachers from Zimbabwe to South Africa endured both an arduous physical journey and a turbulent emotional passage. This was not a simple matter of a border crossing and therefore the term Escape is most apposite. Escape connotes a process fraught with physical and emotional obstacles. As one participant (B2) summed it up in the opening sentence of her narrative: “*It is never easy to leave your home country for another.*”

#### **5.4.4 Repositioning**

Repositioning (see 5.2) is represented in Figure 5.1 as an arrow from Ideal Status to Ideal Status Surpassed. Repositioning is the process by which teachers who have achieved Ideal Status endeavour to surpass this status. It involves far more than Pulling Things Together (see 5.4.2) as is an extended effort by the teacher to eventually surpass Ideal Status. As already mentioned, to be defined as a success in the country of origin, migrant teachers must provide evidence of greater achievement than the local teacher. Attainment of Ideal Status Surpassed through the process of Repositioning earns the successful migrant higher social prestige, especially in the eyes of his/her home country’s society.

Initial coding revealed that the participants had engaged in their effort to improve their lives both in Zimbabwe and again in South Africa and employed several strategies to that effect (see 5.2). The sum total of these is referred to as Pulling Things Together (see 5.4.2). However, as I explored this theme during data collection and analysis, it became clear to me that the efforts of the participants to improve their lives after they had achieved Ideal Status were qualitatively different from their earlier efforts. The focus of their labours was not merely on ordering their lives as it was in Pulling Things Together, but on trying to secure

their status and insure it against demise or deterioration through the accumulation of career and other assets. They felt they had already gained control over their lives and that they now needed to move further to consolidate their position and reach higher levels of career success.

Their efforts were directed in three different but not totally independent directions: financial security, professional change and educational improvement. Financially the participants invested or aimed to invest in certain income generation projects which differed from the pre-migration projects in that these were not designed at mere subsistence but at wealth creation. They felt that such an investment could eventually give them greater financial security and prosperity. Some participants were involved in several transnational activities as they took advantage of their Zimbabwean citizenship to invest in that country. A4 described his future plans with regard to repositioning:

*Funds permitting... I would get a stand and build a sort of mini-college of my own and, means being possible, I would grow it into a school of my own if possible.*

This teacher plans to invest by establishing a private school. This shows a desire to not only establish greater order but is also a definite business venture which incorporates professional expertise.

A2, who had already achieved Ideal Status in south Africa, shared how he is repositioning himself for financial security, “*We are investing back home... Yeah, you see, I am renting out my house in H. but now I am building two more. One in M and the other in H and all for rentals!*” Building houses to rent is an entrepreneurial venture that goes beyond Pulling Things Together. Hence, I considered this to be part of the process of repositioning in an effort to attain a higher status. Even those without the means and not yet in a position to invest had aspirations of repositioning by securing their financial future, “*I don’t have the money to go back home to do some projects but if I had that chance I was going to do the same whereby I would go back home and like invest and do something like in terms of construction*” explained A5.

Repositioning also embraces the notion of finding ancillary work or eventually a second career outside of teaching. To realise this, certain participants sought to re-skill and enrolled

for degrees outside of the discipline of education, usually in business and commerce in anticipation of the chance to branch out into business or a private sector job. R1 was the only participant categorised as being in the Ideal Status Surpassed and he was articulate about his on-going strategies to reposition himself:

*My final target, if possible, is to get into the corporate world and utilise my educational qualifications because at the moment I am in the educational field but I feel I am under-utilising my qualifications. I strongly feel that if I can penetrate the corporate world and I can put into good use what I have actually studied.*

He has obtained a Bachelor of Commerce through an open and distance learning institute and would now want to leave teaching and work in the private sector where he could utilise his new qualification combined with his teaching competence to earn more, possibly in the field of corporate training. Other participants sought to enrol for or were studying for higher degrees at South African institutions, which would take them out of the classroom into educational management positions or lecturing positions in higher education. C1 was a participant who had attained Ideal Status and is studying for a PhD, which will very possibly be the route to a secondary career in education such as a position in the Department of Education or at a university. Such efforts were also considered indicative of repositioning.

#### **5.4.5 Return**

Return emerged as a theme present from the beginning of data gathering but it only became possible to clarify and integrate it with the other categories after the formulation of the core category. I expound on this process by examining in particular how it links to the core category, Status, and to the subcategories: Ideal Status Surpassed, Ideal Status; Diminished Status; and Further Diminished Status. Return was, however, a process not yet enacted by any of the participants. Rather it functioned as an ever-present possibility and so should be considered a valid component of the grounded theory.

Return refers to the permanent relocation of the participant back to the country of origin. An analysis of the return prospects of the migrant teachers is important because it establishes whether the teachers who have left Zimbabwe have any intention of going back to

permanently resettle and maybe even resume their posts. Most participants spontaneously mentioned issues related to return. Although a number of participants (A6, C1, A4 and C1) appeared to regard return as an inevitable end to the migration phase, the participants in general demonstrated a wide range of opinions regarding return. These ranged from inevitability to a total rejection of any notion of return. For example C1 said *“I am planning on returning. Yes, that day is coming when I will have to return anywhere.”* A6 corroborated this sentiment saying *“Home is where we belong. And home, we need to get back home.”* On the other side of the spectrum A5, who was adamant, stated *“I don’t see the reason for me to go back.”*

Most participants attached conditions to a return home in the future and these related to factors beyond their control. They lay mainly in the political and/or economic spheres. B1 put the economy first saying *“[I would go back] when there is a drastic improvement in the economic conditions.”* R1 added *“I hope to go back maybe possible if we have a new party in place maybe.”* This refers to the inauguration of a new ruling party who would bring about a positive and radical change across the political landscape and in civil security. Another participant, C1, felt that political and economic futures overlapped, *“I hope [by] then the political repression would be gone, and the economy would be back on its feet.”* In general, participants realised their powerlessness to change macro features (the economic and political situation) in Zimbabwe and thoughts of return were mainly wishful thinking.

Personal reasons also featured in the consideration of a return. A2 was concerned about enrolling her daughter who was in Grade 10, back in a Zimbabwean school and about the disruption this would cause: *“I will only go back when my daughter completes her education [in South Africa].”* Another participant, N1, who migrated after she was fired for joining a strike, was doubtful about her work prospects upon return and said *“I don’t know if the Ministry [of education] would re-hire me but I hear they are desperate for teachers even within towns.”*

#### 5.4.5.1 Return at the point of Diminished Status

All participants were initially driven by the desire to improve their status. A return home after having failed in this objective would be considered a fiasco by the individual, their family and the home community. Nevertheless, the following were considered concrete motives for

possible return: failure to secure a job in South Africa, the failure to obtain legal documents for residence, financial insufficiency, cultural pressures / shocks, accommodation problems, the lack of moral support or loneliness and the fear of xenophobia. To surrender to any of these factors and to return at the level of Diminished Status required admitting a failure to utilise the strategy of migration to better one's status. This acted as a strong deterrent to return. Participants resisted returning at Diminished Status because:

- i) They feared social stigmatisation and being labelled as a failure on return to the country of origin in Diminished Status. Moreover, if they could not then find employment, they would suffer further loss of social prestige.
- ii) They remain hopeful that their fate might improve and their status be enhanced.
- iii) Return could mean re-entering the same conditions or worse conditions than those they sought to escape.
- iv) The financial cost incurred by return and re-establishment was prohibitive.

However, even in the face of the above-mentioned, participants in Diminished Status were tempted to return, seeing it as a possible solution for their problems.

The hope that they would soon be in a position to start Pulling Things Together helped participants to endure difficult times. A short term strategy adopted by some participants (A4 and R1) was to return to Zimbabwe temporarily during their job hunt in South Africa. A4 explained how he juggled job hunting with job keeping, retaining his job in Zimbabwe whilst hunting for a new one in South Africa.

*... there we were interviewed and told to go back, I had to go back to Zim [Zimbabwe]. And within two weeks or so he [his brother in South Africa] calls me again... he says now you may come back it looks like now something is materialising.*

#### 5.4.5.2 Return at the point of Further Diminished Status

Participants who slipped into the Further Diminished Status in South Africa suffered even greater set-backs than those in Diminished Status. The humiliation and financial setback that

occurs at a return in Further Diminished Status is greater than that suffered by one who returns in Diminished Status. Thus, the motivation to reject the return option is very great.

Participants at this status level had usually failed to secure a teaching post or other suitable job. This situation was often exacerbated by the fact that they did not have the requisite employment and residence documents. Trapped in this stranglehold, participants had to accept any menial job that came their way in order to survive. Although these participants felt they were living a sub-standard life compared to what they had back home, they were still keen to stay in South Africa and pursue their original dreams. To summarise, participants in the Further Diminished Status were motivated to stay by: the desire not to lose face even though they had less to lose by staying, the fact that returning would exacerbate their financial problems, that conditions at home were unchanged and that they still hoped to restore their fortunes in South Africa. In spite of these, the migrant could be compelled to return simply because of his / her need to survive.

#### 5.4.5.3 Return at the point of Ideal Status

Even those who had achieved Ideal Status in South Africa admitted that they had considered Return at some stage but were deterred by the dismal prospect of life in the home country. A participant (A1) described this dilemma as follows: *“Going back would be like, you know, going back to the same conditions that I had sort of run away from.”*

Those who had achieved an Ideal Status were often still tempted by the idea of return to their country of origin by nostalgia and homesickness. Return in this case would not amount to a failure but rather be evidence of a triumph. Their achievement of a standard of living that they consider to be ideal means they were successful as migrants. However, the risk that Return would again jeopardise Ideal Status made it undesirable. In the light of this, A3 said that they would return to Zimbabwe only if things were to ‘*go bad*’ in South Africa. This shows that successful migrants are cautious of losing the gains they have made through their long and painful experiences and are protective of their hard-won Ideal Status.

Any thought of return was dependent on good prospects in the home country. A3 said *“If we get a good [job] offer in Zim [Zimbabwe] we might go.”* Return depended on the guarantee that they could retain their Ideal Status. We can conclude that the motivation to stay or return

is based on status. Motivating factors for participants who enjoyed Ideal Status to return to Zimbabwe were: to avoid any threat to status that could arise in South Africa, to return home in the event of improved conditions there, and to show off their newly-found Ideal Status, together with its status symbols, thereby elevating their social prestige in the home community.

Participants in Ideal Status are the group least likely to return. Fortune has smiled on them and as C1 put it, they wish to “*make hay while the sun shines.*” These participants feel that it is in their best interests to remain and press their advantage to the maximum provided conditions are favourable. They wish to take full advantage of the host country’s socio-economic conditions and they wish to avoid the cost of relocation and re-establishment and the disruption of their children’s education, their work and their spouse’s employment. At this level, participants become preoccupied with Repositioning, that is, changing their status from Ideal Status to Ideal Status Surpassed.

#### 5.4.5.4 Return at the point of Ideal Status Surpassed

Return after attaining the Ideal Status Surpassed would comprise the most triumphant return of all. Such participants would definitely be hailed as successes. However, to attain Ideal Status Surpassed would require a substantial stay in the host country and this decreases the likelihood of deciding to return and relinquish the investment made. At this stage participants are likely to have secured permanent residency in South Africa and to be holding positions of responsibility at their workplaces. In addition, it is likely that by this time spouses and children would have integrated in the host nation’s society. R1, the only participant who had reached Ideal Status Surpassed, explained:

*I would be lying to say I intend to go back. I am quite comfortable; anyway my family is here I am settled. I have obtained my kids and we have our papers together. Eh, at the moment I’m seeing South Africa as my permanent home.*

R1 is settled in South Africa, is content and no longer considers returning to Zimbabwe. A return to the country of origin would be an upheaval of similar magnitude to the initial migration. “*I am in my comfort zone*” is how R1 describes his feelings about life in South

Africa. The decision not to return is made with consideration of the opportunities still available and risks posed to Ideal Status Surpassed. These opportunities and risks are the same as those that were discussed for participants who have achieved the Ideal Status (see 5.5.7.3). However, unlike the teachers who have only achieved the Ideal Status, a participant who has achieved Ideal Status Surpassed is likely to be even more cautious in their decision making as they have more to lose.

## **5.5 DISCUSSION OF GROUNDED THEORY**

This section deals with a discussion of the grounded theory in terms of its contribution to an understanding of factors driving teacher migration. Firstly, the viability of the core category Status (see 5.5.1) is discussed followed by an assessment of migration as an effective strategy to alter status (see 5.5.2). Thereafter, the discussion turns to the location of the grounded theory and the research findings in sociological theory (see 5.5.3) and in migration theory (see 5.5.5). Although most of the literature referred to in this discussion was reviewed prior to embarking on the fieldwork (see 1.5.1), I found it necessary after the emergence of the grounded theory to revisit the reviewed literature and to review additional literature to further interrogate the research results in the light of existing sociological and migration theory.

### **5.5.1 Viability of Status as core category**

The study indicated that although participants had experience of different status levels, they all strove to attain and maintain the Ideal Status. This realisation led me to identify the core category: Status. This umbrella category incorporated all initial categories identified (Ideal Status, Ideal Status Surpassed, Diminished Status and Further Diminished Status) and as the grounded theory developed, these became sub-categories. Categories in the form of processes (Things Fall Apart, Pulling Things Together, Escape, Repositioning and Return) linked the sub-categories of the core category (see 5.4). The three properties of the core category were: working conditions, standard of living and social prestige (see 5.3.1). These properties were useful in determining how a participant evaluated and experienced Status and could be used in other contexts to gauge teacher satisfaction and the extent to which a teacher may consider migration. This is potentially useful to educational planners in their study of teacher retention and erosion.

The core category Status is the focus of this study which strives to explain the migratory behaviour of Zimbabwean teachers to South Africa. Simply put, teachers use migration as a final solution to improve or maintain their Status. As a strategy that places high emotional, social and economic demands on the teacher, it is neither a common strategy nor the first choice in an attempt to improve Status. Teachers first explore several alternate strategies to improve Status (see 5.2). Educational planners who wish to retain teacher skills within an education system should find ways to address teacher concerns about Status. If they neglect to do so, it will become increasingly difficult to retain teachers within the country of origin. To summarise, teacher Status is a key aspect of teacher deployment policies and it directly affects the quality of education within a country.

Status is also useful in understanding how to lure migrant teachers back to the education system of the country of origin. The seriousness with which teachers consider Return is largely dependent on their status. For example, it was argued (see 5.4.5.3) that teachers who have attained the Ideal Status would resist returning to their homeland if such a move would jeopardise their status. Even if Status diminishes, the teacher is often even more concerned about remaining in the host country to avoid losing face back home. Thus, education planners in the host country who are evaluating the role played by migrant teachers to fill teacher shortages and to teach scarce subjects can use Status as a useful planning tool. Return is contingent on Status in complex and often seemingly ambiguous ways.

Therefore, the grounded theory succeeded in identifying Status as the core category and provided a viable explanation of the decisions of migrant teachers, both in the home and host country. It helped to account for their actions which may have appeared arbitrary without the explanatory theory. Further it is argued that Status can be applied to other areas of professional behaviour to explain teacher motivation and career decisions. Examples are the decision to quit the profession or the loss of competent teachers through their decision to leave the classroom for more profitable education management positions.

### **5.5.2 Efficacy of migration to alter Status**

As mentioned, migration, qualified as Escape, was adopted by the participants as a final solution to improve Status. The question can now be posed as to how effective migration is in achieving this. The findings indicated that migration was only partially successful to improve

Status within the relatively short time period of five years, the maximum time allowed for inclusion in this study. Clearly, the longer the time spent in the host country, the greater the efficacy of migration as a means to alter Status positively. Seven participants who had been employed had stayed three or four years in South Africa had achieved or regained the Ideal Status; the other six had not but they had been in South Africa for less time. Table 5.5 summarises participant details according to status and time spent in South Africa at the time of the study.

**Table 5.5 Post-migration classification of participants on the Status continuum**

<b>Code Name</b>	<b>Sex</b>	<b>Age Group</b>	<b>Teaching Experience</b>	<b>Post Level</b>	<b>Years in the R.S.A.</b>	<b>Status</b>
A1	M	45-49	15	P	4	<b>IS</b>
A2	M	40-44	12	S	4	<b>IS</b>
A3	F	30-34	5	S	3	<b>IS</b>
A4	M	40-44	13	S	3	<b>IS</b>
A5	F	35-39	8	P	4	<b>DS</b>
A6	M	45-49	15	S	4	<b>ISS</b>
B1	M	40-44	14	S	4	<b>IS</b>
B2	F	25-29	7	S	4	<b>FDS</b>
B3	F	30-35	5	P	3	<b>FDS</b>
C1	M	45-49	14	S	4	<b>DS</b>
N1	F	40-44	16	S	2	<b>DS</b>
R1	M	30-35	8	S	4	<b>IS</b>
R2	F	25-29	5	S	2	<b>DS</b>

**Key**

<b>DS</b>	Diminished Status	<b>FDS</b>	Further Diminished Status
<b>IS</b>	Ideal Status	<b>ISS</b>	Ideal Status Surpassed
<b>S</b>	Secondary School	<b>P</b>	Primary School

The last column of Table 5.5 indicates the participants' position on the Status continuum: only one participant enjoyed Ideal Status Surpassed; six participants fell in the Ideal Status category (IS) and were in the process of Repositioning, four were in the Diminished Status (DS) and two were in Further Diminished Status (FDS).

Post-migration two participants (B2 and B3) found themselves in a position worse than the one they had left. They had both failed to secure employment as teachers in South Africa and had resorted to menial jobs (as a waiter and shop assistant). B3 eventually gave up work and stayed at home to look after her child supported only by her husband's salary. A2 and A4 had achieved the Ideal Status at the time of the study however, they admitted that immediately after their migration to South Africa, they had initially sunk into Further Diminished Status. These two participants had subsequently been able to achieve Ideal Status through a concentrated effort of Pulling Things Together.

The main cause for descending into Further Diminished Status after migration was the failure of the teachers to secure a teaching post, either prior to entry into South Africa or within a short period of time after arrival. Consequently, these participants in Diminished and Further Diminished Status categories had to settle for blue collar jobs or subsist on their meagre savings while unemployed. These were participants whose teaching specialisations were not in demand in South Africa, such as primary school teachers (B3) and language teachers (B2). The highest demand is for secondary school maths and science educators and the South African government advertised a quota of 1 000 work permits for this category in 2005 and subsequent years (Department of Home Affairs, 2007). Similarly, those whose working and residence permits were not in order found it difficult to enter into the teaching profession in South Africa and had to take alternative jobs, albeit temporarily.

The findings suggest that it was possible but very unlikely for participants to achieve more than Ideal Status within five years of migration (see Table 5.5). Only one participant (R1) had achieved this. R1 had completed four years in South Africa at the time of the interview and during this period he had been continuously employed as a teacher. This had facilitated his Repositioning. Moreover, he was one of the few who had first regularised the work and residence permit before migrating and had thus been able to start working immediately on arrival. His specialisation is Business Studies and Economics which has some currency as a teaching specialisation in South Africa. These factors combined to give R1 the opportunity to achieve the Ideal Status Surpassed. Participants who had achieved Ideal Status had on average been in South Africa longer than those in Diminished or Further Diminished Status categories. They had lived and worked in South Africa for an average of 3,7 years; those in Diminished Status or Further Diminished Status had been in the country for an average of 3,1

years. Time is therefore a key factor in the improvement of post-migration Status; migrants need time for Pulling Things Together and for Repositioning.

This finding is significant for any professional teacher who is considering migration. Moreover, hasty 'escape' without legal documentation and at least a teaching contract does not bode well for the migrant. A5, B1 and B2 are classic examples; all had completed four years in South Africa but had not yet achieved Ideal Status. Influential factors that have a bearing on the efficacy of migration are: the preparation that the migrant makes prior to migration in terms of securing residence and work permit, a job contract, the nature of their qualifications and the demand for their subject specialisation. In addition, a network of friends and relatives in the receiving country can make it substantially easier for the migrant as they assist with money, information, accommodation and transport.

### **5.5.3 Status in sociological theory**

Status, also referred to as social status, is an important concept in sociology but is defined variously by different sociologists depending on their theoretical position. Max Weber (Weber, 2010 and Weber and Secher, 1967) who is widely credited for the concept of status bequeathed sociology with the notion of social status as the location of a person or group of persons in the social strata based on the amount of social prestige they receive; where prestige refers to the amount of respect which a person is accorded by others. Ritzer and Ryan (2011:613) elucidate Weber's definition saying: social status is the location of collectivities, communities, groups or strata in social hierarchy of honour and prestige. Therefore, social status is the social position of honour occupied by a social group or individual. Pampel (2007:106) makes a relatable observation when he says that for Weber, social status is based more on social evaluation or prestige than on economic position and explains that in capitalist societies today, money means less than the lifestyle that it is used to support. This corroborates the findings and definitions of status in the body of the thesis where standards of living and social prestige were dependent on teacher salaries but in reality were more important than the salaries themselves.

Applerouth and Edles (2008:385) offer a definition of social status based on Robert Merton's role-set theory: the social status is a position in a social system which has a distinctive array of designated rights and obligations. Robert Merton in his role-set theory posits that a person

does not assume one role and one status but a single status usually has more than one role attached to it, that is to say it has a role-set (Merton 1957:111). A role is a set of behavioural expectations associated with a given status Kendall (2003:136).

Kendall's (2003:134) definition continues as follows: status is the "position in a group or society characterised by certain expectations, rights and duties." He goes on to explain that the positions are distinguished from one another in terms of differentiated duties and rights, immunities and privileges gained in professions or other significant areas of social life. Therefore, people in the same status group have certain expectations about their rights, duties and privileges. There are also certain expectations about how the members of the group should carry out their duties and these are referred to as role expectations. This dimension of status also emerged in the grounded theory: participants were aware that the status they occupied as teachers shaped the expectations of family and acquaintances concerning social duties such as contribution to and participation in funerals. When they could not meet these expectations, they suffered a loss of esteem.

Status groups are communities distinguished "in terms of positive or negative social estimation of honour" and are linked to a specific life style that is expected of all those who belong to the circle (Adams and Sydie 2002:187). Thus status groups enjoy the same level of honour and are characterised by the similar consumption patterns and lifestyle; these groups strive to enhance the position of their members by claiming the rights and privileges while resisting status loss (Ritzer and Ryan 2011:613). From a Weberian perspective the high status group members separate themselves from the rest of the society by means of a distinctive and highly respected lifestyle, by acknowledging their similarities and distancing themselves from outsiders (Pampel 2007:107). Status stratification is important to the status groups since it involves entitlement to certain social goods, services and opportunities. According to the grounded theory, teachers form a type of status group with concomitant expectations.

Statuses can be ascribed or achieved. Ascribed are those statuses that are conferred at birth or involuntarily in life and the achieved ones are those that are assumed voluntarily as a result of personal choice, merit or direct effort (Kendall, 2003:135).

From this study it seems teachers in Zimbabwe view themselves and are viewed by society as a status group because of their shared level of honour, consumption patterns and lifestyle.

They perceive their common social role to be that of formally educating the younger generations in society. Some of a teacher's role expectations are contained in the written code of conduct, however others are expressed in social norms and so are not necessarily written down. For example, how teachers should relate to learners and how they should conduct themselves within the school is spelt out in their code of conduct but their behaviour outside the school is largely regulated by the unwritten expectations of their communities. The teachers' status group is an achieved professional status group since membership is assumed voluntarily through direct effort.

Teachers have certain expectations about their rights and privileges based on their membership to this status group. In this study the expectations of teachers were grouped into the areas: working conditions, standard of living, and social prestige (see 5.3.1), all properties of Status. The actual or perceived failure of society to meet the teachers' expectations leads teachers to act individually or collectively to defend their rights. In this study the teachers drew mainly on individual resources to resist a decline in status. They turned to migration and other means even though they perceive themselves as a professional group. Pulling Things Together (see 5.4.2) represents the totality of actions that the teachers adopt in order to stay within their status group expectations. However, Things Fall Apart (see 5.4.1) represents an onslaught on the teacher's rights and privileges and therefore erodes the status group identity and uniqueness.

#### **5.5.4 Migration theory**

In the grounded theory presented in paragraph 5.2 the migration process is subsumed in the category Escape, a process that has two dimensions: physical relocation and emotional escape from accompanying trying circumstances. Migration has been defined variously by several authorities. However the definitions can be grouped into two types. The most common definition of definition is that migration is the permanent or semi-permanent movement of people across space (Suarez-Orozco and Suarez-Orozco, 2005:96) or a movement from one society to another (Harzig, Hoerder and Gabaccia, 2009:89). In this type of definition there is a presupposition that individuals are uprooted from one place or society to be implanted in another. In this study the participants embraced this first definition as they could identify a point in space and time in their lives where they uprooted from their home country and implanted themselves in South Africa.

The second type of definition challenges the notion of migration as a cut and dry movement of a person or persons from one place to another. According to this view, migrants are rarely ever totally uprooted from one country and permanently implanted in the other (Brettel, 2008:120). Migration is therefore defined as the simultaneous engagement in the source and host country. The definition acknowledges that migrants maintain across borders multiple relations that are familial, socio-economic, political and religious amongst others. Therefore, migrant settlements cannot be considered as having made a break with home (Sorensen, van Hear and Engberg-Pedersen, 2002:19). This definition is referred to as the transnational definition of migration (see 2.2) and is relevant to this research since all participants were engaged in transnational activities; they remained in constant touch with their relatives, families and friends and followed the news about Zimbabwe. Their lives were split, emotionally at least, between the two countries. Frequently participants had to move back and forth to check on family members in their home countries, to invest and at times to disinvest other interests in Zimbabwe. In conclusion, elements present in both notions of migration were demonstrated by the experiences of the participants. Even though the migrants themselves did not articulate the transnational definition *per se*, it reflected in their lives.

The migration experience explored in this research can be classified in a number of different ways using the typology of migration discussed in paragraph 2.2. It could be classified as a long-term, international, labour migration that is happening between two neighbouring countries in the southern hemisphere. Both the source and host countries may be viewed as developing countries in the global capitalist system and both have suffered brain drain through emigration (see 3.5.4). However, South Africa is the much stronger economy of the two having achieved economic development that can only be matched by few African countries, if at all (Zimbabwe Government and UNESCO 2010:3). South Africa is now considered an emerging economy and is classified along with countries like Brazil, India and The Russian Federation (South African Government Online; 2012). The World Economic Forum (2011:15) in its Global Competitiveness Report 2010-2011 ranks South Africa 54<sup>th</sup> in the world in terms of the competitiveness of its economy; Zimbabwe is ranked 136<sup>th</sup>. South Africa's skills losses have been offset by the in-migration of labour from its neighbours and other developing countries in the SADC and beyond whilst Zimbabwe's has not.

### **5.5.5 The grounded theory in relation to migration theory**

Globalisation, which has been viewed as both cause and context of migration, appears to have played its part in the migration of participants in this research (see 2.3.2). One of the ways in which globalisation propels migration is by differentially benefiting the globalising countries, creating success stories in some and failures in others. These create or enhance the migration gradient between the successes and failures (Shivji 2002:104). It could be argued that South Africa is a more globalised economy than Zimbabwe judging from the interconnectedness of the economies of the two countries to the global capitalist economy and their ranking in global economic competitiveness (see 5.6.2) (The World Economic Forum 2011:15). South Africa has apparently enjoyed more benefits from globalisation and so it has become more attractive to migrants. It could be argued, that globalisation is to a certain extent responsible for the differences in the economies of Zimbabwe and South Africa and therefore in the standards of living of teachers in the two countries and has created a migration gradient between the two countries in favour of South Africa.

Present levels of globalisation make it possible for the labour shortages in one part of the globe to eventually lead to shortages on the opposite part of the globe because of the time-space compression. This is a characteristic of contemporary globalisation (see 2.3.1). The current shortage of teachers especially in fields such as mathematics and science in South Africa has in part been caused by the heavy recruitment of teachers by the economically dominant countries in the Northern Hemisphere (De Villiers, 2007:67). For example, Britain alone recruited 8 144 teachers from South Africa between 2001 and mid 2005 (Miller et al., 2008:90).

Globalisation has made labour migration and migration in general much easier than it was in the past through the provision of cheaper and faster modes of transport and through easier access to information as a result of improved technology (El-Ojeili and Hayden, 2006:61). It could be argued that the migrant Zimbabwean teachers took advantage of the easier access to information and improved information technology to find teaching opportunities in South Africa. The easier modes of transport now available due to globalisation meant that the migrant could transverse the long distances quickly and comfortably.

World systems theory gives a view of the world as divided into three geographical areas: The core, the semi-periphery and the periphery (see 2.5.1.1), with the core composed of economically and culturally dominant and industrialised countries which exploit other regions by buying raw materials from the non-core countries (that is, the semi-periphery and periphery ones) at low prices and then selling back the finished products to these same countries at high prices (Mooney and Evans, 2007:166). In the same way, the semi-periphery itself exploits the periphery.

The Historic Structural Approach (see 2.5.1.1) seeks to explain migration through the World Systems perspective by supposing that migration is induced by the penetration of capital and investment into the periphery; the investments dislocate peripheral communities and spark international migration towards the core (Harzig, Hoerder and Gabaccia, 2009:74). The unequal terms of trade between the core and periphery create unfavourable conditions for workers in the periphery but make the centre attractive through an improved standard of living. This draws people from the periphery and they migrate towards the core in order to try and improve the quality of their lives. In this study, a group of teachers migrated in order to improve their working and living conditions. Zimbabwe is a country that could easily be classified as part of the periphery because of its weak economy (ZIMSAT and IOM 2010) (see 3.3.4) whilst South Africa which has been labelled an emerging economy by The World Economic Forum (2011:15) (see 3.4.4) could be located in the semi-periphery. Accepting this classification would mean that teachers moving from Zimbabwe to South Africa are moving from the periphery to the semi-periphery. Some of the Zimbabwean teachers are moving in to directly replace South African teachers who have moved to the industrially developed countries or to the core according to the World systems theory. Britain and other industrialised countries have benefitted from a constant flow of migrant South African teachers (Miller et al., 2008:90). However other Zimbabwean teachers who move to South Africa replace teachers lost through other forms of teacher attrition; these are discussed in paragraph 3.4.2.

From a macro perspective the historic structural approach and the world systems theory offer an almost plausible explanation to the migration of teachers. Teachers are drawn towards the core by a higher standard of living as one approaches the core; the movement is from the periphery to the semi-periphery and from the semi periphery to the core. Those in the periphery, like Zimbabwean teachers, it seems are happy just to get to the semi-periphery

whilst those in the semi-periphery are yearning to get to the core. However, this theory suffers the limitation of all macro theories in that it portrays the individual as a passive participant to macro-economic forces (see 2.5.1.1). It fails to explain what motivates individuals and why some move whilst others do not. Neither does it explain what personal issues are taken into account in movement decision (Brettell, 2008:120).

The neoclassic theory of the push and pull factor theory (see 2.5.1.2) does not propose anything radically different from the Historical structural approach because it posits that economies with low salaries and poor standards of living push away the workers, whilst higher wages and better standards of living in the more industrialised regions pull them in (Harzig, Hoerder and Gabaccia, 2009:62). If migration is perceived as an economic phenomenon in which migrants weigh the cost and returns of current and future employment opportunities (Nkamleu and Fox, 2006:5) then the movement of workers from a weak economy to a stronger one makes sense because they are going to make more money in the stronger economy.

The participants in this study clearly moved from an economy with depressed wages, poor living standards and political insecurity (see 3.6.6) to a place where all these conditions were considerably better (see 3.6.7). It could be argued that in their decision making, they did an informal cost-benefit analysis and decided that they would gain more by migrating. Hence, this theory explains the teachers' motivation for migration at individual level. However, the results of this study especially the grounded theory generated, show that the migrants moved from Zimbabwe to South Africa because they wanted to improve their Status which is made up of working conditions, standard of living and social prestige (see 5.2). Their concerns were wider than the narrow economic concerns of the push and pull theory.

The push and pull factor theory fails to adequately account for the fact that disparities in living conditions and in conditions of service always exist between two countries, however migrants do not always move towards the economically better of the two (see 2.5.1). Migration networks become an important facilitating factor in international migration and these cover everything that enables people to learn about opportunities abroad and take advantage of them (Martin and Taylor, 2001:102).

Migration networks are an important part of the migration of teachers from Zimbabwe to South Africa (see 2.5.1.2). All of the participants obtained some assistance from their network of friends and relatives in South Africa, Zimbabwe and abroad in the form of information, funds, accommodation, documentation, acculturation and the moral support needed to migrate. Globalisation has greatly strengthened migration networks through the rapid development of communication and transport technology (Martin and Taylor, 2001:102). Some evidence of this was seen in this research as the participants took advantage of communication technology to mobilise resources for migration from their networks spread over a number of countries in some cases.

The presence of long term political and socio-economic relations between sending and destination countries forms a facilitating factor in international migration (Papademetriou, 2003:41) (see 2.5.1.2). Zimbabwe and South Africa do not only share long term political and socio-economic relations, but also have a long migration history (see 3.6). The Southern Africa Migration System (SAMS) explained by Zuberi and Sibanda (2005:269) is a major, dynamic and self-sustaining labour migration flow that exists within the countries that have historical, political, cultural and economic ties in southern Africa and binds Zimbabwe and South Africa (see 3.5.1). These ties are powerful facilitating factors in the contemporary migration of teachers from Zimbabwe to South Africa. The participants in this study appear to have been following well-beaten paths in their migration.

The Dual labour market theory which forms the base of the Ethnic enclave economy model posits that the labour market is divided into primary and secondary sectors (see 2.5.2.2). The primary sector is where the most favourable and stable jobs with optimum working conditions, high salaries and good prospects of promotion can be found but are usually the preserve of a country's native population (Harzig, Hoerder and Gabaccia, 2009:77). The secondary sector on the other hand is highly competitive and does not enjoy the same pleasant working conditions of the primary sector but instead suffers from low salaries and poor conditions of service. It could be argued that the Zimbabwean teachers who fail to secure teaching jobs on their arrival in South Africa end up in the secondary sector of the economy where they struggle until they make it into the primary sector. Participants who failed to obtain teaching jobs in South Africa because they did not have the requisite documentation or because they offered subjects that were not in high demand invariably ended up doing menial jobs; these are characterised by poor working conditions, low salaries

and are often in high risk conditions such as security work. Some of the migrant teachers were at one time employed in the security and service sector. These participants tried to use these menial jobs to gain a foothold into teaching. The dual labour market theory could be useful in trying to explain the route that the teachers take when they fail to secure employment straight away. However, it could also be argued that the teachers end up in the secondary sector not because they are not natives of South Africa, but because they do not possess any other marketable skills aside from their teaching skills. The primary sector in this case cannot be viewed as an exclusive preserve of the citizens of South Africa since some of the migrants (7 out of 13) had successfully accessed the secure and better paying sector on arrival or immediately thereafter. The dual labour theory is therefore not adequate in explaining the employment route of the migrant teachers on arrival in South Africa.

A theory that permits the inclusion of non-measurable factors such as emotional and spiritual factors in the analysis of migration decisions of individuals is the family economy theory (Harzig, Hoerder and Gabaccia, 2009:75; see 2.5.3.1). The family economy theory uses the family as the unit of analysis in the study of migration and focuses on the income generation capacity of the family and its income allocation strategies for the purpose of covering the family's economic and social costs. This theory posits that families sometimes send a member or members to work abroad in anticipation of remittances that could boost the family's income and as a diversification strategy families employ to guard against losses (Harzig, Hoerder and Gabaccia, 2009:76).

In the small sample of participants that was studied in this research it was evident that as a rule the migrant's family was involved in the decision to migrate although there were a few exceptions. Family members were consulted and their safety and well-being was the motivation for the migration. Participants in this research viewed migration as a way to boost their personal and family income and provide a secure environment for themselves and their families since they sought to improve their working conditions and standard of living amongst other things (see 5.2). However they did employ several other strategies in an effort to improve their lot prior to migration. In trying to view their migration as an income diversification strategy one could focus on the participants that migrated but left their spouses in the homeland to continue to work and look after the family.

The family economy theory could to a great extent account for what is happening to the group of teacher-participants in this study as it focuses on the family income. The theory also has an advantage in that it is attuned to the emotional aspects of migration which are highlighted in paragraph 5.4.3. However its focus on the family could mean it is blind to the work related and political factors that led to the migration of the teachers in the sample.

The brain drain-remittance debate is at the centre of migration theory. The issue of contention in the debate is whether the source countries offset their losses or even make profit from worker migration through remittances received (see 2.6). In this study a group of thirteen teachers who migrated from Zimbabwe to South Africa participated in the study. The migration of teachers can be viewed as constituting brain drain from Zimbabwe. It would be of interest to find out whether the results of the empirical study of this group sheds light on the debate with special focus on Zimbabwe.

The movement of this group of teachers from Zimbabwe to South Africa constitutes a loss of manpower and human capital investment for the country. The group is composed of teachers who are still young (see Table 5.5) and have the potential to contribute to the country's development. The group also represents a loss of tax revenue as these teachers could have contributed to the country's revenue through tax for some time before retirement. On the other hand a number of teachers in the group remit regularly to their home country, especially those who left family members behind. The amount of remittances was not established in this study as this was not the objective of the study.

The results of the empirical study do shed some light on the brain-drain remittance debate with respect to Zimbabwe but it can be argued that the teacher who emigrated from Zimbabwe constitutes a loss of human capital investment and a loss of potential revenue for that country. The remittances that they send to their families contribute to a certain extent to the economy of Zimbabwe. However whether they offset the losses that the country suffers in terms of human capital investment cannot be established.

## **5.6 CONCLUSION**

According to the proposed grounded theory, the migration of teachers from Zimbabwe to South Africa revolves around attaining and maintaining the Ideal Status (see 5.3). The core

category is the Status and conditions of service, living conditions and social prestige form the properties of the core category. The sub-categories of the core category status are Ideal Status, the Ideal Status Surpassed, Diminished Status and Further Diminished Status. These sub-categories are the different forms that Status may assume and they lie on a continuum from the least ideal to the most ideal as follows: Further Diminished Status, Diminished Status, Ideal Status and Ideal Status Surpassed. The sub-categories represent different states the teachers may find themselves in. The sum total of all the things that prevent the teachers from attaining or staying in the Ideal Status are summarised in the category Things Fall Apart; the category of Pulling Things Together summarises the efforts of participants to attain the Ideal Status. Escape summarises the physical and emotional aspects of the process of migration. Migration itself is nothing more than a strategy of Pulling Things Together. Return refers to migrating back to the country of origin from the host country and the motivation of participants to return is determined by their Status. Various sociological and migration theories, such as globalisation, the historical structural approach, the push and pull factor theory, the dual labour theory and the family economy theory can be used to further understand the results of this research. Finally, an attempt was also made to position the results in the brain drain-remittance debate.

Chapter Six provides a summary of the research findings, conclusions, recommendations and areas for future research.

**CHAPTER 6**  
**SUMMARY OF THE RESEARCH, FINAL CONCLUSIONS AND**  
**RECOMMENDATIONS**

**6.1 INTRODUCTION**

The aim of this research study was to uncover the factors that drive the migration of teachers from Zimbabwe to South Africa and to explain how these factors function within a grounded theory of teacher migration. A literature review and qualitative inquiry using the grounded theory approach was used to achieve this objective. In line with this aim, in this concluding chapter I make a summary of the research study and the research findings. Firstly I present a summary of the literature review, explain briefly the research design and describe the empirical investigation. Thereafter I present the key findings of the empirical study. Based on the results of the study I then make recommendations and suggest areas for future research. I note the limitations of this research, offer my reflections on the study and present a final conclusion.

**6.2 SUMMARY OF LITERATURE REVIEW AND RESEARCH DESIGN**

The phenomenon of the migration of teachers from Zimbabwe to South Africa had to be placed in its theoretical historical and social context, and for that a detailed review of literature on the migration was necessary. A summary of this review is in Chapter 2 and 3. In Chapter 2 I summarise key migration theories that were reviewed. In the review it became obvious that there is no one unified theory of migration but many fragmented theories that are compartmentalised within several disciplines. It was clear also that the migration of teachers has not received much literary or theoretical attention. It was observed however, that in migration literature, globalisation is treated as: a context in which migration occurs, a cause of migration and an explanation and therefore theory of migration. This prompted me to delve deep into globalisation literature and a summary of this endeavour is presented in paragraph 2.3. The other prominent theories of migration examined were classified as macro-level, meso-level or micro-level theories and summarised in paragraph 2.4.

Under the macro-level theories, the historic structural approach and the push and pull factor theories, which offer an explanation of migration based on the larger socio-economic factors

that draw or push people to migrate in one direction or another, were summarised (see 2.5.1). Medium range theories examined were transnationalism and the ethnic enclave economy model. These theories focus on issues positioned somewhere between the macro and personal issues and therefore also offer an important view on migration (see 2.5.2). The family economy theory was also examined (see 2.5.3.1). This is one of the dominant micro theories that uses the family as the unit of analysis and has the advantage of allowing the use of non-measurable factors, such as emotions in the analysis of the migration of individuals. Further, the process of migration has become increasingly gendered (Nkamleu and Fox, 2006:35) and for this reason I also examined the gendered perspective on migration (see 2.5.4). An ongoing debate in the migration of professionals is the migration-remittances debate. I presented the main arguments of this in Chapter Two. The key issue of contention in the migration-remittances debate is whether or not the remittances make up for the loss of skills and development potential that the source country suffers (see 2.6).

Literature on social contextual issues that form the background for the migration of teachers from Zimbabwe to South Africa was examined and summarised in Chapter Three. The migration of the Zimbabwean teachers was put in a global perspective by examining international global labour migration and later by examining international teacher migration (see 3.2). The South-North teacher migration flows (see 3.2) and migrations within and out of Africa were examined and discussed (see 3.2.1 and 3.2.2). Literature was also examined for practical benefits and challenges of teacher migration to source and host countries (see 3.2.3). To have a better understanding of the context of the source and host country in the particular case of the Zimbabwe-South Africa teacher migration, the profiles of the two countries were studied (see 3.3 and 3.4). The history of migration between Zimbabwe and South Africa which predates colonialism was examined in order to place the contemporary wave of migration and the current migration of teachers in particular in its proper historical context (see 3.5).

Certain factors encourage and facilitate migration between any two countries. The review of literature revealed that a number of such factors exist between Zimbabwe and South Africa. These include: historical links between the two countries, geographical and socio-economic links (see 3.6).

Countries that suffer an excessive drain of skills adopt certain strategies in order to cope. Literature was examined for coping strategies that a country like Zimbabwe which suffers teacher emigration could use to survive. These strategies for the management of teacher migration were grouped under: teacher retention, return migration and brain circulation (see 3.7).

Finally, the concerns of grounded theorists such as Glaser (1998:68) about doing a literature review before embarking on the empirical study were noted (see 1.5.1.1). In the context of this study and in order not to stifle creativity, the initial literature review summarised above was allowed to rest whilst the empirical investigation was conducted. Notwithstanding, a further review of literature was necessary after the empirical investigation in order to place the research results appropriately and the grounded theory was generated in context.

### **6.3 SUMMARY OF THE EMPIRICAL INVESTIGATION**

The overall research approach that was adopted for the study was the qualitative research approach, an approach that has several designs. This was explained in full in Chapter 4 (see 4.3). The particular design that I deemed appropriate to fit the task at hand was the grounded theory design. Grounded theory design (see 4.4.1) allows the researcher to build a theory from the data in order to explain a process, an action or an interaction and it is most useful when the existing theories cannot adequately explain the phenomenon under study (Ellis and Levy, 2009:328). The constructivist strand of grounded theory design was used (see 4.5.1). This type of grounded theory focuses on meanings ascribed by the actors to certain phenomena. The constructivist grounded theorist is interested foremost in the views, values, beliefs, feelings, assumptions and ideologies of individuals rather than in gathering facts and describing them (Creswell, 2008:333-440).

Theory driven, purposive sampling which is characteristic of grounded theory research design was used to identify 13 data-rich participants (see Table 4.1). These participants took part in a two-phase data generation and collection process. In the first stage they gave details of their life story either through a one-on-one interview or a written narrative. In the second stage they were interviewed to further clarify and expand on issues and in this way I was able to achieve the data saturation of the categories uncovered during the analysis phase (see 4.4.3).

The data analysis was done concurrently with the data collection and generation as is typical of the grounded theory methods (see 4.4.4). This was done through three coding phases: the initial, intermediate and advanced coding stages. Issues of trustworthiness of research results and ethics of the research were also discussed (see 4.5 and 4.6).

## **6.4 KEY FINDINGS**

In the empirical study I sought to explore the experience of a small sample of teacher migrants who have moved from Zimbabwe to South Africa and to develop a grounded theory of factors driving teacher migration based on this data. I presented the results of the empirical study in Chapter 5 as a substantive theory using two illustrative models Figure 5.1 and Figure 5.2.

The study found that the migration of teachers from Zimbabwe to South Africa is all about teachers attaining and maintaining a certain ideal standard of living, working conditions and social prestige (see 5.3). These combined and interrelated sets of factors in their ideal form have been identified in the substantive theory as the Ideal Status, that is, the status that the teachers in the sample identify as ideal. Threats to the Ideal Status were identified and summarised by the (process) category called Things Fall Apart and these threats are grouped under economic, political and social issues (see 5.4.6). The sum of efforts of the teachers to defend their status from the onslaught of these threats was the (process) category termed Pulling Things Together (see 5.4.4).

Depending on how successful teachers are in terms of Pulling Things Together, they may end up in any one of the following positions on the continuum of the category, Status: Further Diminished Status (most negative pole) or Diminished Status, Ideal Status or Ideal Status Surpassed (most positive pole) (see 5.4). Migration was therefore the most extreme measure taken to alter Status and was thus termed Escape. The latter indicates that migration placed serious logistical, financial, emotional and social demands on the teachers and was therefore usually adopted as a last resort.

A detailed exposition of the core category and its sub-categories is made in par 5.4. A comprehensive presentation of results detailing the process of the formation of the key categories and sub-categories from initial themes was done in 5.5. Finally, in the concluding

section of Chapter 5, I located the results within the framework of migration and sociological theories.

## **6.5 RECOMMENDATIONS**

Some recommendations based on the review of literature were discussed in detail at the end of Chapter 3 (see 3.6) and were directed at the three areas of teacher retention, return migration of teachers and brain circulation. In this section I summarise those recommendations from Chapter 3 and incorporate further thoughts based on the findings of the empirical study.

In order to retain teachers within Zimbabwe I recommend:

- i) Teacher remuneration that matches the regional standards for professionals and provides benefits, such as free or reduced tuition for teachers' families, housing in rural areas and transport for teachers who live at great distances from schools. This will help to retain teachers particularly in isolated parts of the country.
- ii) Pension benefits that are substantial enough to motivate teachers to remain in the profession.
- iii) Improved living conditions of rural teachers by providing clean water, electricity and easy access to service centres.
- iv) Assisting teachers who wish to improve their educational qualifications by granting bursaries to such teachers and paying an incentive after qualifications have been acquired.
- v) The efficient promotion process of deserving teachers.
- vi) Facilitating the process of accepting positions in other schools so that teachers can manage their career opportunities.
- vii) Prompt and deserved attention to teachers' grievances.
- viii) De-politicising schools by allowing teachers the full right to civic participation without fear of victimisation.
- ix) Improving the public's image of teachers by highlighting their social role.

This following recommendation is directly aimed at attracting back the teachers who emigrated from Zimbabwe:

- i) Encouraging the return of teachers can be done by giving returnees incentives such as a settling allowance and housing.

Brain circulation means ensuring that skilled professionals who have already migrated remain within the broad geographical region with the hope that they will someday return to the home country (see Chapter 2). I present here recommendations for brain circulation of managing migrant teachers.

- ii) Finding ways to encourage teachers who emigrate to remain within the broad geographical region and encourage those further abroad to return to the region, if not the homeland itself.
- iii) Cooperating with governments within the region to maintain an equitable number of teachers through a mutually controlled supply of teachers to the respective education systems.
- iv) Encouraging partial and temporary return of teachers and other professionals for short terms of employment such as summer schools, continuous professional development and short term teaching in specialist subjects such as maths and science.
- v) Allowing teachers who have migrated to work electronically with schools, school examination boards and other departments of education in Zimbabwe, thus ploughing their knowledge and expertise back into the home country.
- vi) Keeping a detailed data base of teachers working abroad.

## **6.6 AREAS FOR FUTURE RESEARCH**

Based on both the literature study and the empirical research I propose the following areas for future research.

- i) To replicate this study with other migrant Zimbabwean professionals, for example doctors or nurses based in South Africa or other countries with a view to check whether the grounded theory that was generated in this study is transferable and can be extended to cover other migrant professionals.
- ii) A survey of the ideal conditions of service that can retain teachers within Zimbabwe. In this research it became apparent that the migrant teachers had certain expectations

about the conditions of service under which they wanted to work but for the purpose of retention of teachers who are still within Zimbabwe it might be necessary to understand what their expectations of the conditions of service are and hence the need for a survey.

- iii) A study of the regional conditions of service might shed light on the migration gradients (see 1.1) that exist for teachers within the region. Then possibly a baseline of conditions of service can be established and used to establish a set of Zimbabwean conditions of service no less attractive to the teachers than those of any other country within the region. The salaries of Zimbabwean teachers could be benchmarked using the regional average.
- iv) An empirical study into how regional countries can cooperate and efficiently utilise the teachers available to them to ease their shortages in their individual countries.
- v) A study into ways to enhance the status of the teacher in the wake of the rise of other professions that have shifted the social focus away from teaching.
- vi) A survey of the possibilities of utilising the migrant teachers' skills within Zimbabwe via ICT.
- vii) A census of Zimbabwean teachers working abroad. This could give an audit of skills available if cooperation could be established with the migrant teachers and the Ministry of Education in Zimbabwe. Initially the focus could be to establish the number of teachers working in the region.
- viii) A study into the migration of professionals in various fields and how it can be managed for the benefit of the country can be made.

## **6.7 LIMITATIONS OF THE STUDY**

This study was part of the requirements for the Doctor's degree in Education at the University of South Africa and I had to adhere to the departmental requirements on how it should be structured. A detailed review of literature in the actual area of study was required before I could embark on the empirical study. However, grounded theory methods dictate that the literature search should be done after the empirical study so as not to stifle the researcher's creativity in developing a fresh grounded theory (Glaser, 1998:72). To minimise this limitation I followed the advice of Charmaz (2006:166) who counsels that where a grounded theorist finds himself/herself forced to do a pre-research literature review, he/she

should do it and then let it lie fallow until categories and analytic relationships between them have been developed.

Further, constructivist grounded theory accepts the role of the researcher as a co-creator of the research findings and does not pretend at any moment that the results are objective. Instead it endorses data as mutually constructed by the researcher and the participants (see 1.5.2) (Charmaz, 2011:131). Therefore, I acknowledge that another researcher doing the same study could have come up with a different interpretation of the same data based on their position within the studied world.

## **6.8 PERSONAL REFLECTION**

Such a study grounded in the data and motivated by my own position as former migrant teacher cannot be closed without some personal reflection on what has been uncovered during the research. Therefore this short section captures my own thinking on a topic which has both academic and personal significance.

The migration of Zimbabwean teachers to South Africa touches the very fibre of Zimbabwean society and could well be the tip of the iceberg of the problems plaguing a beloved country. To manage this issue adequately requires a process of deep social transformation to address a myriad of problems covering the whole political and socio-economic sphere. For example, addressing only one reason cited by migrant teachers, that is, the problem of poor service provision touches various areas of the socio-economic sphere (see 5.3). However, to improve service provision to stem the migration flow of teachers is contingent on the availability of experts in medicine, civil and electrical engineering, town planning, water reticulation and so on, who are in short supply. Experts in these areas will need to be trained, hired from other countries or attracted back before this single problem of service provision can be addressed. The problem of the migration of teachers therefore cannot be viewed outside the context of the emigration of all other experts from Zimbabwe; neither can it be addressed or managed in isolation. For example, a doctor might migrate because of the poor quality of public education; an engineer might leave because there is no doctor to treat him and the teacher might leave because there is no engineer to ensure clean water. So the cycle of migration perpetuates itself. To address teacher migration there is a need to provide a lasting solution to the problem of the shortages of experts in all fields.

Most teachers interviewed tied their return to improvements in the country's macro socio-economic factors. They demanded drastic improvements in the economy of the homeland and in its political situation before they would consider returning (see 5.5.5). Teachers who have acquired the Ideal Status and the Ideal Status Surpassed would not want to return to the homeland at the risk of losing their status hence their demands for improvement in the economic and political areas (see 5.5.5.3 and 5.5.5.4). On the other hand, even those in the Diminished Status and Further Diminished Status make the same demands; even in their present state, they would not want to return to the same problems that they sought to escape (see 5.5.5.1). Improving the economy of a country is not an easy thing that can be achieved in a short time. However, the Zimbabwean economy has shown signs of improvement since the formation of the Government of National Unity in 2009 and the adoption of the Short Term Economic Recovery Programme (STERP) which is now in its second phase despite the gloomy global outlook that saw huge economies in the Euro Zone and North America going into deep economic crisis (The 2012 National Budget: Zimbabwe 2011). The improvements in Zimbabwe's economy have been due to increased production in agriculture, mining and a partial recovery in tourism. The economic growth for 2012 for example was projected to be above 9% of the GDP and a year on year inflation of 5 percent.

Furthermore, a topic uncovered by the participants which has serious implications is the lack of political tolerance and the freedoms essential to democracy. In this regard, the shared Government of National Unity, although far from ideal, has shown commitment to re-establishing democracy by preparing a new constitution which will pave the way for elections under a less restrictive environment (The 2012 National Budget: Zimbabwe 2011). Development in these areas therefore offers hope, not only that some of the teachers and other experts can be retained but that those who have migrated might seriously consider returning.

## **6.9 CONCLUSION**

The main question guiding this research is: What factors drive the migration of teachers from Zimbabwe to South Africa? The answer to this question has been sought through a literature study and through an empirical study which generated a novel grounded theory of teacher migration based on the experiences of a small sample of migrant Zimbabwean teachers.

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## **APPENDIX A: INTERVIEW GUIDE**

### **Initial Interview Guide**

Tell me about your life concentrating on your work in Zimbabwe and on your experiences before and after migrating to South Africa.

Prompts

- Tell me about your life in Zimbabwe before migration.
- Describe your actual migration.
- Describe your life from the time you entered South Africa up to now.
- What are your future plans?
- What were your feelings about....?
- What was your main reason for migrating?
- Evaluate your gains and losses with regards to your migration to South Africa.
- Is there anything else that you would like to tell me that you think is related to this interview?
- Do you have any question that you would like to ask?

**APPENDIX B**  
**CONSENT FORM**

**Informed Consent Form**

My name is Zenzele Weda. I am a Zimbabwean studying towards a D Ed (Socio-Education) in the College of Education, University of South Africa. I am currently carrying out research on the factors influencing the migration of Zimbabwean teachers to South Africa. Prof E. M. Lemmer (contact details: 012 460 5484) is the supervisor of this study and may also be contacted at any time to clarify matters contained in this consent form.

**Purpose of the Study:** The aim of the study is to explore factors influencing the migration of Zimbabwean teachers to seek employment as teachers in South Africa.

**Study procedures:** The empirical inquiry concerns the collection of life histories of former Zimbabwean teachers who have migrated to South Africa and assumed teaching positions in South African schools. Life histories will be collected through written essays and through individual interviews which will be digitally recorded and later transcribed with a view to data analysis. As a voluntary participant you will be expected to do one or both of the following activities:

1. Write a short essay of your career history focussing on your decision to migrate, the experience of migration and assumption of teaching duties in a South African school.
2. Participate in an individual interview (approx 60 minutes) in which you will be asked to relate your experiences with regard to the experience of migration and reasons for this decision. Interviews will be arranged at a time and venue most convenient to you as a participant.

**Compensation:** Participants will not be paid for participation in this research. However, you will be compensated for any transport costs incurred.

**Confidentiality:** The information supplied by you as participant in this research will be treated in strictest confidence and will be used for academic purposes only. Pseudonyms will be assigned to each participant and participant's names and those of any institutions to which they have been attached will not be used in the research report. The research findings will be published only as a thesis and as a research paper.

**Benefits and risks:** The research's anticipated benefits will be a better understanding of the teacher migration phenomenon, common to Zimbabwe and South Africa as well as many other parts of the world. There are no direct material benefits to you as participant and no risks to you, as a voluntary participant, have been foreseen. When the thesis has been completed, a summary of the research findings will be made available to each participant.

**Withdrawal from participation:** You are free to withdraw from the research project or from part of the research at any moment. During interviews you are free to decline to answer any of the questions asked. Should you decide to withdraw from the research, any information you have provided will be destroyed and will not form part of the research report.

**Consent**

Your signature is an indication that you are above 18 years, have read and understood the above and are willing to take part in the research.

Signed

Participant..... Date.....

Researcher.....Date.....

<b>Researcher:</b>	Mr. Z.L. Weda	Cell: 071 529 1406
<b>Research Supervisor:</b>	Prof. E.M. Lemmer	Cell: 084 700 4676