

*Background report prepared
for the OECD Thematic
Review of Attracting,
Developing and Retaining
Effective Teachers.*

Attracting, Developing and Retaining Effective Teachers

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Preface

Sweden participates during the years of 2001–2003 in the OECD project *Attracting, Developing and Retaining Effective Teachers*. This Country Background Report has been prepared by the National Advisory Committee for the Ministry of Education and Science as a part of the above mentioned OECD project. The Country Background Report has been completed from the basis of OECD's instructions that were distributed to all participating countries.

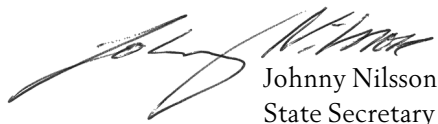
The participating countries have been encouraged to include a variety of views and priorities on teacher policy issues. With the aim of reflecting these different opinions and views, the participating representatives have been asked to contribute with their own as well as their organization's notion of teacher policy issues in Sweden. The views expressed in the report can therefore be opinions of specific stakeholders and are not necessarily shared by all participants.

The Country Background Report is mainly concerned with teacher policy issues regarding compulsory- and upper secondary schools. In OECD's instructions issues regarding pre-schools and adult education are not included. However, in Sweden both pre-schools and adult education are seen as parts of the same educational system as compulsory- and upper secondary schools and are therefore mentioned in the report when so deemed relevant.

The report constitutes a basis for the review team that, on behalf of the OECD, will conduct a review of the Swedish educational system during May 2003. The review team will, based on the observations made during the review visit and the content of the Country Background Report, present their view on teacher policy issues in Sweden.

OECD's evaluation will be published as a report (Country Note) and made publicly available. All the participating countries' background reports as well as the Country Notes can be obtained at www.oecd.org/els/education/teacherpolicy. The Swedish background report and OECD's Country Note of Sweden can be ordered from the Ministry of Education and Science.

Stockholm April 2003



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Executive Summary

In the past decade the Swedish educational system has undergone some major changes, which have altered the nature and conditions of teachers' work. First, the level of decision-making and management of schools have become highly decentralized. While the Parliament and Government have overall responsibility for Swedish school education, shape national school policy, set objectives and adopt central steering documents, the local authorities have assumed full responsibility for allocating resources, organizing and operating school services and ensuring that schools have the necessary staff. Headmasters and teachers have also been assigned new and broader mandates since the actual responsibility of attaining national objectives is located at the school level [pp.25–29]. Second, as a result of migration, cultural diversity has become an increasingly prominent feature of Swedish society, which increases the need to understand and respect different cultural identities. Teachers are therefore expected to possess broader socio-cultural skills in order to meet the need of individual pupils and prepare them for life in a multicultural society [pp.40, p.14]. Third, the traditional role of the teacher as an unquestioned authority, mainly responsible for providing tuition and transmitting information is not longer the case. Instead, the teachers must develop an ability to guide, supervise, and together with the pupils critically review information and appraise different kinds of content and competing sources. The teachers must also learn to assume the role of cooperation partners with parents and pupils, given their augmented right to have a say in school activities [p. 41]. The key issues in attracting, developing and retaining effective teachers as well as policy responses to these issues are identified in this report.

Attracting effective teachers

The trend in recruitment to initial teacher training is affected by the situation in the labour market and the relative attractiveness of other occupations. Following the collapse of the high tech industry, teacher education has become more popular, and is among the fields of studies for which the number of applicants has increased the most during the last couple of years [p.15, p.53]. However, a significant proportion of teachers in upper secondary education will retire in the next 10–15 years, and will have to be replaced [p.33]. The demand for teachers has also been larger than the supply during the last few years, which has forced local authorities to employ teachers without a teaching degree [p.34]. To meet the need for recruiting more teachers the Government has substantially increased the graduation targets for the period 2001–2004 and it is considering an additional expansion of teacher education programs for the following four-year period [p.53]. The Government has also launched a special teacher education program for people with suitable university qualifications and varied professional experience as a measure for satisfying the demand for qualified teachers [p.60].

Teacher shortages are particularly pronounced in some subject areas including mathematics, science, technology and vocational education. Particular efforts have been made to boost the recruitment to these fields. The Government has instructed providers of teacher education to take measures to ensure that at least one-third of all teaching degrees are awarded to teachers specializing in mathematics, science or technology. Supplementary education programs in science and technology has been set up targeting students with non-scientific majors in upper secondary education. These foundation programs have been successful in attracting students into teacher education programs specializing in science and technology. A government-sponsored project combining teacher and engineering education is another measure taken to increase the number of science and technology teachers [pp.60-62].

Efforts have also been made to promote diversity of the teacher workforce in order to make it more representative of the population. There are proportionately too few male teachers, particularly in primary education and the Government urges higher education institutions that provide teacher education, local authorities and employment services to work together to increase men's interest in the teaching profession. Special recruitment efforts have also been made to ensure that the teaching workforce reflects the multicultural society. These in-

clude a preparatory year with studies in Swedish and certain pre-teacher education study areas for young people with an immigrant background. Students who complete this preparatory year are guaranteed a place in teacher education [p. 62].

There is a strong commitment among the stakeholders of education, including the Government, the employer's organization and the trade unions to take measures to enhance the quality of teaching and the attractiveness of the teaching profession. In August 1998 the Minister for Schools and Adult Education, the trade unions for teachers and school principals and directors of education, and the Swedish Association of Local Authorities (SALA) signed a declaration of intent regarding measures to promote the development in the following four areas: skills development and career opportunities in schools, admission and recruitment to teacher education, collaboration between schools, universities and research bodies, and efforts to make schools attractive workplaces. A national 5-year school development project, the Attractive School Project, was launched in 2001 with an aim to create work organizations which support the development and quality improvement initiatives in schools, explore new development and career opportunities for teachers and promote development in schools via partnership with universities and the business community. Other major national initiatives include two five-year school improvement agreements signed by SALA and the teachers' unions on pay and conditions of employment. The agreements also cover headmasters and directors of education. Both the employer's organization and the teachers' unions attach great importance to these agreements as a significant step towards attracting, recruiting and retaining teachers. Additional small-scale projects have been undertaken by the Government to stimulate the recruitment of teachers and the development of attractive schools [pp. 45–50].

Developing effective teachers

A new system of teacher education was implemented in 2001 to create a modern teacher education that is more in tune with what teachers are facing and at the same time builds on a substantially reinforced research foundation. Some important components of the new teacher education program includes a common training for all teachers from pre-school to upper secondary school, an extended work-based training module, a strong focus on scientific based methods in teaching and the development of research skills facilitating the pursuit of postgraduate training. Apart from making the teacher student more prepared for working life, the work-based training serves the purpose of giving the schools opportunities to develop skills in various subject areas. The encounters between university teachers and school teachers enhance improvement in areas such as subject related didactics. It also gives the local school authorities the possibility to influence teacher education [pp. 54–58].

While there is a strong consensus on the importance of in-service training for teachers, there are no central directives issued by the Government stating that teachers must take specific training programmes. But the National Agency for Education (now the Agency for School Improvement) does provide grants to local authorities and schools for skills development in national priority areas [p. 79]. The local authorities are formally responsible for providing skill development and in a central agreement between the parties they have agreed to set aside 104 hours (as an indicative value) per employee per school year during the teachers' regulated working time. How this time is divided up and used is determined on the basis of the school's and the individual teachers' needs. The curriculum emphasizes the headmaster's responsibility for this, although individual teachers are personally responsible for their own skills development [pp. 78–79].

Attention has been drawn to the work situation and new duties of headmasters on several occasions in recent years. There is a growing concern that some headmasters lack the necessary qualifications for being effective leaders considering their new range of responsibilities. Under the Education Act, only persons who have acquired an understanding of the theory and practice of education through their own education and experience may be appointed as headmasters. Apart from this, there are no specific requirements as regard to eligibility or specific education for appointees to headmaster posts. Although not being reinforced, there are various opportunities for training and skills development open to headmasters arranged by SALA and the National Agency for Education (now the Agency for School Improvement) [pp. 50–51, pp. 81–82].

Retaining effective teachers

While the number of teachers who leave the teaching profession altogether for other reasons than retirement varies very little from year to year, there is an increasing tendency for teachers to leave before retirement age. Likewise, there is a concern of rising sick leave rates and leave of absence among teachers [pp.72–73]. The working load and working environment have been identified as key reasons. Better school management, smaller groups of pupils, more support staff to alleviate the burden of teachers and support for new teachers are some of the suggested remedies. Given the division of responsibilities in the Swedish school sector, the main responsibility for retaining and developing the skills of school staff rests with the local authorities. Together with the teachers' unions, the Government and SALA have initiated various programmes and development projects in order to support these efforts. Some of the larger-scale projects were mentioned in the section attracting effective teachers. Their objective was to find new development and career opportunities for teachers, and several local development projects are still in progress in various local authorities. According to the agreements between the employers' and employees' representatives, an induction programme is to be set up for a new teacher's first year, including workplace induction and professional induction. A mentor is to be appointed for each new teacher. However, this program has not entirely been working out since not all new teachers have been assigned a mentor [pp.76–77].

A major reform to improve the recruitment and retention of teachers is the introduction of individual pay for teachers abolishing the previously fixed pay scheme with pay ladders. The purpose was to raise teacher salaries collectively and link pay to performance, which would address labour market pressures on teachers' pay. Pay levels are determined through negotiations between the school management and the individual teacher [pp.68–69].

Chapter 1. The national context

“Investment in education is becoming increasingly important, both to the individual and to society as a whole. A well-educated population is essential to creating growth and prosperity and developing democracy, apart from the fact that a good education also increases the individual’s opportunities for a full life and for strengthening his or her status in the labour market. It is therefore important that everybody, regardless of their background, should have the opportunity to acquire a good basic education and opportunities for lifelong learning”.

The above paragraph opens the preface to *A School for all*, a policy communication from the Ministry of Education and Science which deals with Sweden’s pre-school and school policy¹. It embodies the essence of the main objectives of Swedish education policy. Education is essential in modern society, both for society itself and for individuals. Good schools are therefore crucial to every country’s future development. The importance of education for growth lies not only in the need for economic growth, but perhaps even more in the need for growth of the country’s cultural and democratic capital. Now that society is undergoing rapid change and becoming ever more technically complex, which means that social processes that affect the lives of children and adolescents are often invisible, it is necessary to constantly improve and deepen the education of the country’s population. One important feature of this education is the teaching of fundamental democratic values that must constantly be learned and owned anew. This calls for an education system that can meet new challenges on the basis of a solid foundation of values.

Sweden must have well-qualified and committed teachers if it is to fulfil society’s demands and expectations as regards school education. The teachers’ input is crucial to the quality of school education and to its development. In the Government’s opinion, therefore, the role of teachers can hardly be overestimated.

¹ Utbildningsdepartementet, 2000, U00.028, *A school for all: On the government’s pre-school and school policies*.

National school policy objectives

Sweden's Parliament has approved an appropriation instrument under which the overall objective of education policy is for Sweden to be a leading knowledge nation with high-quality education and lifelong learning for growth and justice. Three main objectives have been set for the concrete implementation of the school system: *A school for all*, *The democratic school* and *Lifelong learning*.

A school for all

School education is a human right. The UN Convention on the Rights of the Child recognizes the right of all children to education and to assistance so that they can benefit from it. Under Swedish law, all children must take part in school education for nine years, from the year they attain the age of 7 until they are 16.

The Swedish Education Act establishes that all children must have access to equally good education regardless of their sex, where they live and their social and economic status. All children must be offered education from an early age, and no-one should be excluded from education on account of high fees, unemployment in the family etc. The central principles of Sweden's education policy are that schools must be open to everybody, that pupils must be offered a choice of schools and fields of study, and that the education provided must be of equally high quality.

In order to ensure the availability of and free choice in education, all schools in Sweden, whether publicly or independently operated, must be open to all people of school age. An inclusive school is a school that offers all pupils education of equally high quality. School education must therefore maintain consistently high standards, both as regards different types of school and different schools. This means that all pupils must be given the chance to achieve the declared objectives of the education. Extra support must be provided for children with various kinds of learning difficulties.

The democratic school

One of the main aims of school education is to instil, establish and adhere to the fundamental democratic values on which Swedish society is based. These values include the inviolability of human life, individual freedom and privacy, the equality of human beings, equality between women and men and solidarity with the weak and disadvantaged.

Focusing on a common foundation of values means instilling and applying democratic principles in schools and in society as a whole, promoting equality and equal opportunities and preventing and combating bullying, sexual harassment, violence, discrimination, xenophobia and other expressions of a lack of respect for other people. Democratic values must be integrated into all school activities. Schools are unique social and cultural meeting-places for people of various ages and with varying backgrounds. All school staff – from headmasters to porters – must make every effort to combat negative attitudes and prejudice. All school staff must consciously and deliberately promote understanding for other people.

In order to effectively embody democratic ideals, schools must be places where young people are respected and have a say. Pupil influence is an important point of departure in all planning and implementation of school activities. The most elementary reason for this is that schools are supposed to educate pupils to be democratic citizens. This places demands on the school environment as a whole and on the need to provide pupils with their own experience of taking part in cooperation based on democratic principles.

Pupils' learning depends on the amount of influence they have over their knowledge process, which means that they must be given the opportunity to develop their interests and thus experience the joy of learning. Experience of influence may also have a favourable effect on pupils' ability to make choices, search for information, learn from one another, discuss the content of knowledge and ways of acquiring it, cooperate and form an opinion about the content of teaching.

Parents have overall responsibility for their children's upbringing and development. They also have an important role to play in schools, since the educating and nurturing functions of schools are closely linked. Parents are entitled to influence in school affairs. The meeting of the different viewpoints of parents and school staff drives development. The involvement of parents is crucial to the way children think about school and the results they achieve. By the same token, it is also important for schools to be an active part of the local community.

Lifelong learning

All education policy in Sweden, not to mention elements of labour market and cultural policies, is built around the principle of lifelong learning. This has to do with the fundamental approach to learning and knowledge, which are regarded as an integral part of a constantly evolving society. One ambition is to make it possible for everybody to enhance their knowledge and skills by learning all their lives.

The Swedish school system is based on a holistic approach. The various types of schools form a continuum. This holistic approach is clearly expressed in the curricula for pre-schools, for pre-school classes, compulsory schools, and school-age child care and for non-compulsory schools, all of which express the same foundation of values and conception of knowledge, regardless of whether they refer to one-year-olds in pre-schools or teenagers at the upper level of compulsory school or at upper secondary school. The curriculum for upper secondary school also includes adult education at this level.

One aspect of the holistic approach to lifelong learning is that pre-schools, which have their own curriculum, are regarded as the first step in the education system. This is based on the assumption that the teaching provided in pre-schools is very important to children's development and learning. Providing support at an early stage of the child's linguistic development and extra support for children with special needs prepares them better for school proper. Another aspect of this holistic approach is pre-school classes, which are a special type of school for six-year-olds. They are intended to be meeting-places between the cultures of pre-school and school education and to provide a smooth and flexible transition between the pre-school and school stages. The approach applies also to school-age child care, which are a complement to schools and offer the younger school-children opportunities for meaningful leisure. The compulsory school curriculum thus also covers pre-school classes and school-age child care.

Another aspect of the holistic approach is the effort to achieve closer links between the various types of schools with a view to supporting pupils' development and learning in a long-term perspective. This includes closer collaboration between the various groups of school staff. It includes cooperation in teams composed of people with different skills and interaction between various types of schools.

One basic principle of the holistic approach and collaboration is to avoid barriers between the various levels that might lead to the grouping of pupils at an early age. Instead, the idea is to promote flexibility when it comes to education choices and to allow more scope for meeting each individual pupil's needs. As a result, the structure of the Swedish school system, in which various types of schools build on and complement one another, provides a good foundation for lifelong learning.

Since the principles and structure of the steering documents are the same, the compulsory and upper secondary school levels form a continuum.

The Government's objective is for most pupils who leave compulsory school to take one of the national programmes, or a specially designed or individual

programme, at upper secondary school. At present, 98 per cent of pupils go on to upper secondary school, and about three-quarters of these complete their studies within four years.

Upper secondary school, which is a non-compulsory school from the pupils' point of view, aims to provide pupils with basic skills and knowledge which in turn lay a foundation for continued learning at work or in higher education. The Government's target in this respect is for 50 per cent of upper secondary school students to go on to higher education. At present, about 40 per cent do so within three years of completing upper secondary school². Those who do not complete the basic upper secondary school programme for any reason can supplement their studies with various types of adult education and thus become eligible for higher studies.

Societal conditions and trends

Sweden's education policymaking obviously depends on conditions in society as a whole and on international developments. Important parameters that are relevant to education policy include demographic factors, the economy and the labour market, as well as people's attitudes to school education. In view of the current situation and emerging trends, the Swedish school system faces some specific challenges.

The population structure

With 9 million inhabitants Sweden is a small country in terms of population. The population is growing slowly at a rate of less than 1 per cent per year. Fertility is declining, at the same time as life expectancy is increasing, which means that the population is ageing.

The birth rate in Sweden has fluctuated considerably in the last 50 years. This is reflected in the age structure of the population. The birth rate was particularly high in the 1940s and 1960s, and the same applies to the period 1986–94. These fluctuations in population growth involve certain inevitable consequences for society. For example, as a result of the baby boom of the 1940s a large number of people will retire in all economic sectors in the next 10 years or so.

This is expected to lead to a shortage of labour from the year 2008 and several years ahead, which in turn will affect the supply of teachers in various ways. The teaching workforce as a whole will be reduced as a result of normal staff turnover and other sectors will compete with the education sector for well-educated la-

² SCB, 2001, rapport UF36 SM0201.

bour. The need for teachers at the infant and junior levels is expected to increase slightly due to a rise in the birth rate. On the other hand, the last of the 1980s baby boomers will start leaving the school system.

A multicultural society

Ever since the 1940s Sweden has received large numbers of immigrants, and at times the rate of immigration has been very high. Today, net immigration (the number of immigrants minus the number of migrants) accounts for all the growth in the population. (Source: Statistics Sweden).

Previously, Sweden had a relatively homogenous population, but is now becoming an increasingly multicultural society. This is evident from the rather high rate of immigrant density, with 11.5 per cent of the population born in other countries, compared with 4 per cent in 1960 and 9.2 per cent in 1990. Including individuals born in Sweden, one or both of whose parents were born abroad, one inhabitant out of five today has ties with another country. (Source: Statistics Sweden).

This cultural diversity presents the school system with new challenges when it comes to the task of offering all pupils equally high-quality education. The immigrant population is unevenly spread over the country and is concentrated in certain regions. In many local authority areas, particularly in the metropolitan regions, more than one out of two children aged 6–16 have a foreign background, i.e. at least one of their parents was born outside Sweden. In some cases this figure is as high as 60 per cent (as of December 2002; source: Statistics Sweden). Consequently, teachers have to teach pupils from widely varying cultures and social backgrounds in the same class.

The declared aim of Swedish school education is to recognize cultural diversity and support children and pupils whose mother tongue is not Swedish. As a result, children who are not native Swedish speakers have a legal right to mother tongue education while at compulsory and upper secondary school. The multicultural and international perspective is clearly expressed in the national steering documents relating to school education. According to these documents, everybody should be educated so that they can see their own life situation in a global context. The purpose is to build international solidarity and prepare for a life involving close contacts across cultural and national boundaries.

The economic context

Compulsory and upper secondary school education in Sweden is almost entirely financed out of central and local government funds. The local authorities pay the

largest share. Sweden spends about 5 per cent of GDP on pre-school classes, compulsory schools, Sami schools, upper secondary schools, local authority administered adult education and education for persons with learning disabilities. The total cost of school education is about 11 billion. About two-thirds of this is spent on compulsory schools and about a quarter on upper secondary schools.³

Sweden suffered a severe economic crisis during the first half of the 1990s that led to a sharp decline in both central and local government economies. This made cutbacks necessary in several important public services, including school services. This led to greater pressure on the resources available for school education, particularly as regards staff.

The local government economy has improved in recent years, and local authorities have been able to increase resources for schools, both overall and per pupil. However, investment has been distributed rather unevenly between local authorities, and some of them have still not caught up. For this reason the Government has increased the allocation of funds for school education. Government grants to the local authorities have increased and extra government grants have been made to allow staff increases. The purpose is to make it possible to improve the quality of pre-school and school education by increasing the staff of pre-schools, school-age child care and schools.

The labour market

As a result of the recession of the early 1990s, the employment rate fell sharply in almost all labour market sectors in Sweden. After the most severe recession years the labour market situation stabilized, and at the end of the 1990s the demand for labour rapidly increased. Open unemployment is currently running at just over 4 per cent in Sweden.

The present favourable labour market situation is also reflected in the labour market for teachers. There is at present scarcely any unemployment at all among teachers (less than 1 per cent). To the extent that the National Labour Market Board reports teachers as job-seekers, they are usually teachers who are between jobs because they have moved to another part of the country.

The attractiveness of the teaching profession, like other professions, depends on what other career opportunities the labour market has to offer. During the boom of the late 1990s, when the IT sector and knowledge-intensive industries were

³ The total cost in 2002 was SEK 104.4 billion.

growing very fast, there was a great demand for scientists and engineers. As a result, many teachers of science and engineering subjects found work in the private sector.

Attitudes to school

One question that has been discussed in Sweden in recent years is public attitudes to school and how they affect school activities and the work of teachers. Among other things, the role of the media has been debated in this connection. One view that is often heard is that the media paint a negative picture of school education and all too rarely inform their readers about the constructive development work now in progress in this sector. To mention one example, the Swedish Teachers' Union carried out a questionnaire survey which indicated that many teachers regard the negative media coverage as unjustified criticism of the teaching workforce⁴.

The negative picture of schools that is supposedly painted by the media only partially reflects the attitudes to school that are expressed in opinion surveys aimed at the general public, parents and pupils. All these surveys show that the closer people are to schools, the more favourable they are. The general public has less confidence in the school system as a social institution than parents, who are more satisfied with the school that their own children go to. Generally speaking, parents and pupils also have great confidence in teachers. Another common feature of such surveys is that pre-schools are very highly regarded by both the general public and those who use them⁵.

Teachers and the knowledge society

The last century witnessed three major changes in production and the distribution of the workforce: from an agrarian economy to an industrial economy to a 'knowledge economy'. Industrial production increased several times over during the 20th century. At the same time, the prices of inflation-adjusted goods have steadily fallen. And the costs of 'knowledge products', such as health care and education, have increased. The number of employees in industry increased during the first half of the 20th century, after which it steadily decreased. The number of 'knowledge workers', i.e. persons involved in the development, management and dissemination of knowledge, has increased since the 1960s.

⁴ Lärarförbundet, Medlemsdiskussionen 2001, Slutrapport 2002-03-02.

⁵ See for example Skolverket, Attityder till skolan 2000 och Svenskt Kvalitetsindex 2001 (Source: Kommunförbundet, Aktuellt om skola och barnomsorg 2001)

The production and reproduction of knowledge

Investment in education and the building of a strong human capital base is essential for growth in Sweden. Knowledge production requires well-educated and specialized researchers, but it also requires technicians whose work is to some extent manual, while also requiring advanced theoretical knowledge. To put it simply, there appear to be two main categories of knowledge workers. The first is a group that develops knowledge for new production, and the second is a group that educates and maintains knowledge, i.e. a group that reproduces knowledge. This latter group includes an increasing number of knowledge technicians, but also traditional knowledge workers such as teachers, doctors, lawyers etc.

Another notable feature is the growing number of people involved in reproducing knowledge (such as teachers, health workers etc.), while the volume of knowledge is constantly increasing. Less and less people are needed to produce knowledge, but more and more are needed to make this production possible. This in turn also changes social and cultural patterns. The skills and capacities of knowledge workers, and thus their value in the labour market, are linked to their ability to constantly update their knowledge. This need to update knowledge can be met in various ways. Formal education lays the foundation, but cannot always be flexible enough to meet the new demands of knowledge work. In other words, lifelong learning involves various types of learning at different periods of a working career.

The expansion of the education sector

The changes that have taken place in Swedish schools during the last decade or so are similar to the changes that have taken place in production. The transfer of responsibility for pre-schools from the social sector to the education sector has strengthened the platform for lifelong learning. Pre-schools have a curriculum of their own that is linked seamlessly to the curricula for pre-school classes and compulsory schools. Upper secondary school education was extended to three years for all students, with courses in core subjects that are the same for all programmes, specifically in order to lay a foundation for knowledge work. The ongoing investment in adult education, which has made it possible to supplement previous education, is also motivated by new production patterns. Furthermore, the higher education system expanded and new universities and university colleges came into existence in the 1990s. All in all, about half the population are now involved in education, whether as pupils, students or teachers.

An education system on this scale, that must meet the needs of a rapidly changing society, cannot be centrally controlled. Those who work in the education sector must have the opportunity to continuously change and develop. The system of political control of education was therefore changed in the 1990s. However, the

decentralization that has resulted from the changes described above has taken place within a specific framework. The national objectives and the principle of fair and equal education remain unchanged. As a result of increased evaluation, quality assurance and supervision, these national objectives and guidelines have in fact been given a more prominent place.

Higher and different knowledge requirements

The great challenge facing the education system is the need to meet the new demands associated with knowledge-intensive production. Increasingly complex technologies call for a high level of knowledge. In view of the constant increase in information we must learn to assess information. The demands being made on citizens are changing drastically in a global world. Education must strengthen and further develop democracy. Given the changes that have taken place in the Swedish education system during the 1990s, the key issue now is how to develop and improve various types of education. It is the soul of education that must be discussed and changed if we are to meet the requirements of a changed society and working life.

The teaching profession as an attractive knowledge profession

It is against this background that appropriate measures must be taken to strengthen the teaching profession and recruitment to it. The important thing is for the teaching profession to be perceived as an attractive knowledge profession. For this to be the case, teacher education must make the same demands and be of the same quality as other higher education programmes and must be an integral part of the higher education system. Such integration is only possible where active research is conducted that can provide a theoretical basis for education, develop it and enable teachers to participate in research and thus find ways and means of applying new knowledge. If the students do not perceive teacher education as an advanced form of education in a vibrant research environment, teaching will not come to be regarded as a leading knowledge profession. It is therefore important that teachers should be university graduates and, where this is not possible, school management and experienced teachers must assume responsibility for guidance and quality assurance.

Chapter 2. The school system and teaching workforce

Education reforms

Swedish school education witnessed extensive reforms of both structure and content in the 1990s. Overall, these reforms may be described as the most extensive in the history of Swedish school education. As a result, the number of pupils, teachers and other school staff in the education sector almost doubled during the decade.⁶

The reform process was undertaken in response to the need for a more flexible education system. The political strategy adopted in order to meet this need is based on decentralization, deregulation and local independence. One of the aims of this strategy is to find flexible solutions that promote change and innovation. The national level still has overall responsibility for school education, as witnessed by the Government's insistence on the equal quality of education provision. The National Agency for Education is responsible for national monitoring, evaluation and supervision and for developing regulatory instruments such as syllabuses and grading criteria.

The local authorities are responsible for the provision of school education services. There is a well-defined division of responsibilities between politicians and professionals; teachers and headmasters are responsible for implementing and evaluating the national steering documents at the local level. The steering documents are often given practical effect in local plans of work at school level. Local authorities can adopt local school plans to give the schools in their area a specific profile. The need for evaluation is emphasized at all levels.

A series of reforms were implemented in the 1990s. Upper secondary schools were transformed by the introduction of 17 programmes based on a course system, and this has led to a marked expansion of upper secondary school education. Upper secondary school programmes last three years and those who pass these programmes become eligible for higher studies. Pre-school classes have been introduced for

⁶ The number of students increased from 1.4 million to over 2.5 million. Including adults, the number of students increased from 1.5 million to 2.8 million.

six-year-olds and are, together with school-age child care, covered by the compulsory school curriculum. Pre-schools are now integrated into the education system and have a curriculum of their own. Major investment has been made in adult education, which has opened up new opportunities for adults to complete their upper secondary school education. Another reform is the introduction of independent schools. These are governed by the same rules and curricula as local authority schools and are also financed by local authorities.

Two major commissions have recently presented their proposals and these will, following a consultation process, result in government bills. One commission studied the possibility of changing the upper secondary school system in order to reduce the number of programmes, thus introducing a new structure. The other reviewed the Education Act with a view to adapting it to take into account the reforms implemented in the 1990s.

Types of schools

The Swedish education system comprises various types of schools for children of different ages.⁷ The main types of school, with the relevant age groups in brackets, are:

- Pre-schools (1–5)
- Pre-school classes (6)
- Compulsory schools (7–16)
- Upper secondary schools (16–19)

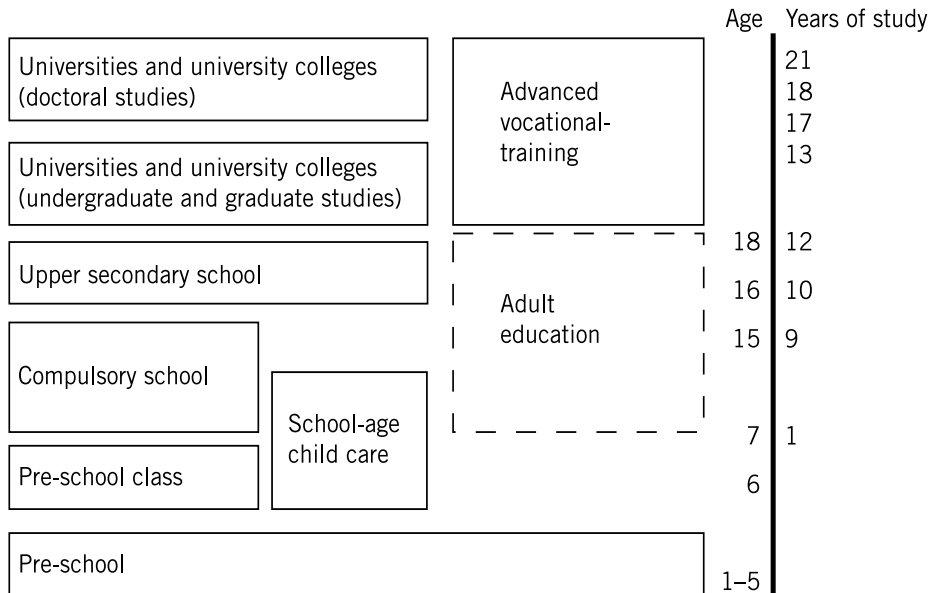
Pre-school, Pre-school class and upper secondary school are non-compulsory.

Apart from the mainstream school system, there are a number of other schools:

- Sami schools
- Special schools for pupils with impaired hearing and associated disabilities
- Schools for pupils with learning disabilities
- Local authority administered adult education
- Education for adults with learning disabilities

⁷ Most of the statistics in the following sections are from a report published by the National Agency for Education.

The Swedish Education System



Pre-schools etc.

Basically, Swedish pre-schools provide a combination of education and care. This means that children with places in pre-schools can spend the whole day there while their parents are working or studying. Fees are paid up to a certain ceiling. Pre-schools are governed by the relevant sections of the Education Act and by their own curriculum. Under the Act, all children whose parents are working, studying, on parental leave or unemployed are entitled to a pre-school place from the age of one. The pre-school system also includes *family daycare home*, which are an alternative type of care that mainly cater for children aged 1-5.

In 2003 a new Act on universal pre-school education for four-and five-year-olds entered into force. 'Universal' means that these services are available to all children in this age group and that they are free of charge. The children are offered a pre-school place for at least 522 hours per year, which corresponds to three hours a day during school terms. Local authorities are required to offer children places in pre-schools, but children are not obliged to attend.

Most pre-schools are operated by local authorities. There are also privately operated pre-schools that are financed by local authority funds. A person who wishes to operate a pre-school must obtain authorization from the local authority.

Private pre-schools are run in the form of a company or association, or by private individuals. Parent-run cooperatives are private pre-schools that are run by the parents of the children who attend them.

Pre-school classes

Pre-school classes are a non-compulsory element of the public school system. The purpose of these classes is to stimulate children's development and learning and lay a foundation for their future school education. All six-year-olds are entitled to a place in a pre-school class. Attendance is voluntary, but local authorities are required to offer places to all the children in this age group free of charge. The vast majority of all six-year-olds attend a pre-school class (93 per cent at present). Pre-school classes are subject to the compulsory school curriculum.

School-age child care

After-school care centres are available for children aged 6–12 who are in need of care outside school hours. They are usually located on school premises, and the staff collaborate closely in teams together with teachers and pre-school teachers. To some extent, their activities are subject to the compulsory school curriculum. Some local authorities also offer family day nurseries for this age group.

Compulsory school

Sweden has a nine-year compulsory compulsory school for pupils aged 7–16. It is the dominant component of the school system, with the longest period of study and consequently the largest number of pupils and staff (see figure 1). Children normally start compulsory school at the age of seven. However, parents can request that their children start school one year earlier, and they can also, in consultation with the school and the local authority, let their children start one year later. Compulsory schools aim to provide all pupils with a basic knowledge of Swedish, natural sciences, social sciences, humanities and other core subjects and to establish a foundation for continued education at upper secondary school.

Other compulsory schools

The other compulsory types of school are Sami schools, special schools for pupils with impaired hearing and associated disabilities and schools for pupils with learning disabilities.

Sami schools offer the children of the Sami (a national ethnic minority group living in parts of northern Sweden) an education with a Sami focus. The education provided in Sami schools corresponds to the first six years of compulsory school. After this, the children spend the last three years in mainstream compulsory schools. Nine local authorities also provide Sami education that is integrated into local authority schools.

State special schools provide individually adapted education for disabled pupils, primarily those who are deaf or have impaired hearing, that corresponds as far as possible to a normal compulsory school education. Most other disabled children attend ordinary compulsory and upper secondary schools or, where appropriate, schools for children with learning disabilities. Compulsory school attendance for pupils in special schools is up to the age of 17.

Schools for children with learning disabilities provide individually adapted education for pupils with learning disabilities that corresponds as far as possible to normal compulsory and upper secondary school education. Even seriously retarded children receive educational stimulation of a kind that is best suited to their needs.

Upper secondary school

Upper secondary school is non-compulsory and free of charge and is open to students who have completed compulsory school. Its aim is to enable students to improve their knowledge acquire democratic skills and basic values.

Students can choose between 17 three-year *national programmes*. All these programmes provide a broad basic education and basic eligibility for higher studies. Core subjects take up about one-third of the students' study time in both theoretical and vocational programmes. The other subjects are programme-specific subjects and optional subjects. Local authorities must offer all young people in their area admission to upper secondary school up to the calendar half-year when they reach the age of 20.

Apart from the national programmes there are specially designed and individual programmes. The specially designed programmes are local designed programmes that correspond to the national programmes but allow students to choose unconventional combinations of courses and subjects. Individual programmes are for students who, due to insufficient qualifications or other reasons, cannot start a national or specially designed programme immediately. These programmes prepare students for a transfer at a later stage to a national or specially designed

programme. In the autumn of 2001, 15 per cent of first-year upper secondary school students were enrolled in individual programmes, which corresponds to 7 per cent of all upper secondary school students. About 30 per cent of the students who take individual programmes transfer to a national programme after one year.

Other non-compulsory education

The other types of non-compulsory education consist of upper secondary education for students with learning disabilities, local authority administered adult education and education for adults with learning disabilities.

Upper secondary education for students with learning disabilities consists of vocationally-oriented education, similar to that in ordinary upper secondary schools. It is a continuation of the compulsory education for this group of pupils, and all the programmes last four years.

Local authority administered adult education is open to adults who have not completed 9-year compulsory and/or 3-year upper secondary school. Students who meet these criteria have a right, but no obligation, to enrol in adult education, while local authorities are required to provide such education. The adult education system also offers students other opportunities for broadening their qualifications and is an important element of the lifelong learning infrastructure. To enable all adults to participate in lifelong learning regardless of whether they are at work or unemployed, adult education programmes are as flexible as possible. This means that the students themselves can choose the pace of study and studying arrangements, including distance studies via the Internet. Local authorities must also provide Swedish language programmes for immigrants. All education administered by local authorities is free of charge.

Education for adults with learning disabilities is subject to the same curriculum as that for upper secondary schools and mainstream adult education, but there are no syllabuses or time schedules. This education is for adults with learning disabilities who wish to supplement their education. It consists of single subject courses and is designed to enable students to acquire knowledge similar to that provided in compulsory school and upper secondary school national programmes for pupils with learning disabilities.

Independent schools

The majority of children attend a local authority school close to their home. However, children and their parents are entitled to choose another local authority school, or an independent school. Independent schools must be open to all pupils

and approved by the National Agency for Education. They must apply the same curriculum and syllabuses as local authority schools, but may have a specific emphasis, e.g. with respect to religion or teaching methods, which differs from that of local authority schools, although local authority schools may also apply a special teaching method. Independent schools are normally financed by grants from the pupils' home local authorities. Independent schools that receive local authority grants must not charge school fees. If an independent school does not comply with the Education Act, the National Agency for Education may withdraw its approval, which means that it is closed.

During the school year 2001/02 over 9 per cent of compulsory schools were independent schools. This is a substantial increase on 1993/94, when such schools represented no more than 4 per cent of all schools. The number of pupils at independent schools has almost quadrupled since the early 1990s. Nevertheless, as a percentage of the total the number of pupils it is still relatively small (5 per cent in 2001/02). The expansion of these schools has occurred mainly in the metropolitan regions. Many rural areas have no independent schools at all.

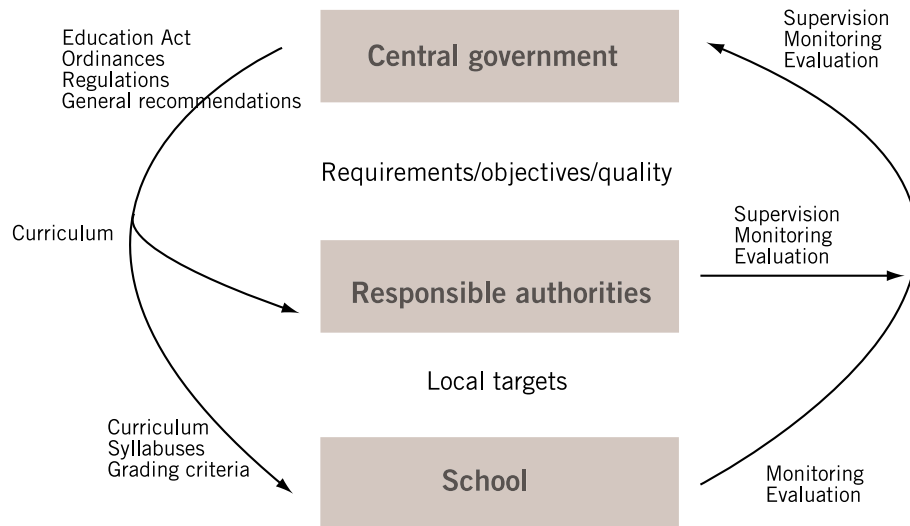
There is also a growing trend for upper secondary school students to apply for admission to independent schools. In 2001/02, 22 per cent of upper secondary schools were independent schools and were attended by over 6 per cent of all upper secondary school students. The figure for 1993/94, by contrast, was less than 2 per cent.

Regulation and responsibility

The Swedish Parliament and Government have overall responsibility for Swedish school education, shape national school policy and adopt central steering documents. Ten years ago, local authorities assumed full responsibility for pre-schools, pre-school classes, compulsory schools and compulsory schools for pupils with learning disabilities. They also have primary responsibility for upper secondary schools, although county councils are responsible for certain types of schools. The state is responsible for Sami schools and special schools.

Organization and division of responsibilities

As a result of the changes in political control that took place during the 1990s there is a new division of responsibilities between central and local government and the schools themselves.



Schematic diagram of the objective- and result-oriented management system.

The Government and Parliament have overall responsibility for publicly funded education in Sweden and adopt provisions and guidelines relating to all aspects of school education. Central government control is exercised through the steering documents relating to school education, including the Education Act, ordinances, curricula, syllabuses and time schedules. Central government also finances part of the education system through general government grants to the local authorities and targeted government grants to the school sector. The state is also responsible for teacher education.

The National Agency for Education is the central administrative authority that is responsible for school education from pre-schools to upper secondary schools. On March 1 2003 the Agency was split up into two authorities: the National Agency for Education and the Swedish Agency for School Improvement. The purpose is to separate the Agency's supervisory role from the task of supporting development. One of the Agency's main tasks will now be to review the quality and results of education, both at local authority and school level, and to exercise supervision over school education services. It will continue to draft steering documents, e.g. syllabuses and grading criteria, and be responsible for matters relating to independent schools.

The main task of the new *Swedish Agency for School Improvement* will be to support and stimulate local authorities and schools in their efforts to achieve the national objectives. It will be a vehicle for the state's efforts to improve quality in priority areas. In addition, it will be responsible for headmaster training and promoting the skills development of staff in pre-schools, schools and adult education. It will also encourage continuing use of information technology in schools, be responsible for development-oriented information campaigns and disseminate research results.

Local authorities are responsible for providing education in pre-schools, pre-school classes, compulsory schools, upper secondary schools, upper secondary schools for students with learning disabilities and adult education. They are responsible for providing these services in accordance with the guidelines adopted by Parliament and the Government in the Education Act, ordinances, curricula and syllabuses. This responsibility includes allocating resources, organizing and operating school services (for example, ensuring that schools have the necessary staff, premises, equipment and teaching materials). They adopt local objectives and are responsible for monitoring and evaluation at the local level.

Headmasters, teachers and other staff are responsible for the content and results of the education provided at each school. All school employees are responsible for ensuring that pupils have the opportunity to achieve the objectives of the curricula and syllabuses.

The headmaster has overall responsibility for breaking down national and local objectives into concrete teaching objectives. The content and organization of teaching and the methods used, among other things, are specified in the school's plan of work. Headmasters are responsible for the development of their school, the pupils' results and the school's success in achieving its goals, as well as for ensuring the quality, and equal value, of the teaching provided. This also comprises responsibility for both financial management, personnel management, the work organization, educational development and quality improvement.

Teachers are expected, in cooperation with their colleagues and the pupils, to decide how the operational goals are to be achieved. The task of teachers may be described, to put it simply, as promoting the pupils' learning and equipping them to evaluate and critically examine information and assimilate it into useful knowledge.

School management system

The Swedish school system is based on management by objectives, which means that the state exercises control by setting objectives. The local authorities then

decide, within the framework adopted by Parliament and the Government, how school education is to be organized and provided and what resources to allocate for this purpose out of the overall budget. Management by objectives and results involves anticipatory management by objectives and ex-post management through monitoring and evaluation. The national steering documents currently in force in the field of school education are: the Education Act, ordinances, curricula, syllabuses, grading criteria, programme objectives and time schedules. The aim of this division of responsibilities is to avoid detailed regulation and to allow local authorities and schools scope for adapting service provision to local conditions and choosing the ways and means to achieve the objectives.

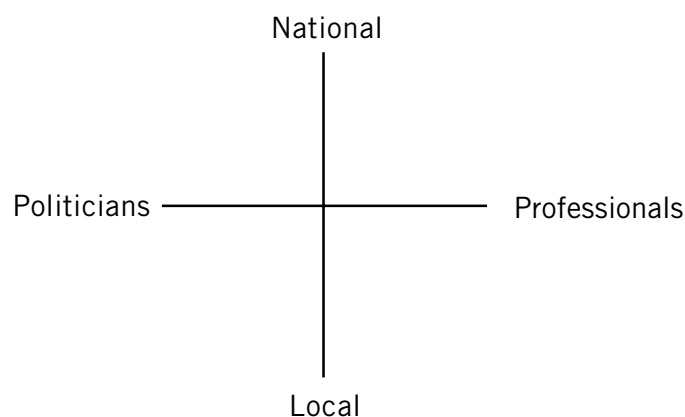
The principles for a school education system based on management by objectives and results are set out in the Government Bill *Responsibility for School Education* (1990/91:18). Central government formulates objectives and evaluates performance. Local authorities and other responsible authorities provide and develop school education in accordance with these objectives and allocate the necessary resources. They are also responsible for monitoring and evaluating achievement of the objectives. An important element of this joint responsibility is a continuous dialogue between central and local government and between local elected representatives, headmasters and other school staff.

A system of management by objectives and results allows the individual schools to decide on appropriate ways and means to achieve the objectives set by central government. Headmasters and teachers are assumed to possess the necessary skills to accomplish their tasks as instructed without detailed rules from above and to decide how to attain the objectives set at both the national and local levels. The schools themselves, the local authorities and central government are all responsible for monitoring and evaluating performance in order to establish the extent to which the objectives are actually attained.

The new system of political control of school education was developed in response to the changes taking place in society and the workplace⁸. The growth of knowledge and the changes in its organization and structure called for a flexible school system. One of the basic aims of decentralizing the system was to strike a balance between politicians and professionals. This means that teachers and headmasters are responsible for giving practical effect to the objectives, that national politicians are responsible for setting objectives and that local politicians are responsible for the provision of education services.

⁸ Prop. 1990/91:18, *Om ansvaret för skolan*; See also Lindesjö, Bo and Lundgren, Ulf P., 2000, *Utbildningsreformer och politisk styrning*, HLS förlag, Stockholm.

The management model may be illustrated in simplified graphic form as follows:



The model assumes that both politicians and professionals will take rational decisions on the basis of available information and evaluations and that there is a clear division of responsibilities between politicians and professionals.

A broader teacher's mandate

For teachers, working in an objective-oriented and decentralized school system is very different from working in a centralized system. Consequently, teachers have a new and broader mandate. The recent school reforms are based on the principle that teaching staff should have the opportunity and be obliged to develop their own teaching activities. This management model is sometimes called *participatory management by objectives*. It is the professionals, i.e. the staff, who are to agree on how to achieve the objectives. In other words, the professionals are now more directly responsible for educational design and innovation. Basically, the task of teachers has been extended to include matters such as practical achievement of the national objectives, local curriculum work, local evaluation and organization of their own learning processes. The fact that they have local responsibility means that the staff have greater scope for organizing the knowledge process at the local level, and therefore have more responsibility for pupils' knowledge assimilation.

Steering documents

The Education Act contains basic provisions on education in all types of schools. It lays down overall objectives for education and guidelines for the division of responsibilities and the organization of school activities. It lays down the local

authorities' basic obligations. It also contains provisions aimed at pupils and parents that relate to compulsory school attendance and the right to education. The key provision of the Act (chapter 1, section 2) stipulates that the education provided by different schools must be of equally high quality and establishes the overall objectives of school education and the foundation of values on which school activities are based. One essential principle embodied in the Act is that school activities must be organized in accordance with basic democratic values.

The Government adopts *ordinances* for each of the different types of schools. These contain more detailed rules than those of the Act, which is necessary in some cases in spite of the system of management by objectives and results. The ordinances contain provisions concerning the content of the education, grades etc.

Strictly speaking, a *curriculum* is an ordinance adopted by the Government after Parliament has established the basic principles, for example what subjects are to be taught at school and the nature of the grading system. The curricula specify in detail the objectives established by the Education Act with regard to schools and pupils' performance. The foundation of values on which education is to be based also articulated in these objectives. Three curricula are currently in force:

- *The Pre-School Curriculum* (adopted in 1998)
- *The Compulsory School Curriculum* – applicable to compulsory schools, Sami schools, special schools and schools for pupils with learning disabilities, as well as pre-school classes and school-age child care (1994)
- *The Non-Compulsory School Curriculum* – applicable to upper secondary schools, upper secondary education for students with learning disabilities, local authority administered adult education and education for adults with learning disabilities (1994)

Alongside the curricula, *syllabuses*, *time schedules* and *grading criteria* specify the knowledge and skills that should be acquired by pupils in individual subjects and the guaranteed minimum number of hours during which pupils are entitled to teacher-supervised teaching in various subjects and subject groups.

The curricula, syllabuses and grading criteria make up a whole. The principle is that syllabuses should be based on the foundation of values set forth in the curricula. It is only when the syllabuses are analysed in relation to the curricula that the larger picture becomes clear. Educational objectives are expressed in two steps: either as objectives to aim for or objectives to attain.

Quality improvement, monitoring and evaluation

Systematic monitoring and evaluation of school results is a key element in efforts to achieve high-quality school education. Given the objective of equal quality at the national level in a decentralized system, central government must not only set the national objectives but also assume a large share of the responsibility for systematically monitoring and verifying that they are attained. All schools and local authorities must prepare quality statements in which their performance is evaluated in relation to the national objectives and mention is made of the measures that will be taken if the objectives are not attained. Quality statements are an important input in the dialogue between schools and the local authority as regards the extent to which individual schools have obtained objectives, and they are also an important factor in a school's relationships with parents.

Quality audits are a priority element of the Government's school policy. Organizing quality audits will be one of the main tasks of the National Agency for Education. The ambition is to double the capacity of the Agency's education inspection activities, which include both quality audits and supervision, so that all authorities responsible for schools and all schools are regularly inspected. It is important to publish the results of such inspections so that they are available to pupils and parents.

The teaching workforce

Professional categories

The Swedish education system employs staff belonging to several professional categories⁹. Naturally, the largest of these is teachers. Other categories include headmasters and directors of education, school nurses, psychologists, counsellors, pupil's assistants, studies and careers counsellors, cleaning staff, school meal staff and administrative staff.

The staff at pre-schools consists mainly of university-educated pre-school teachers and childminders with an upper secondary school education. At present, the ratio between the two categories is 52 per cent pre-school teachers and 48 per cent childminders. The total number of pre-school staff is 64,500.

⁹ The following data is derived from: Skolverket, 2002, rapport 214, Barnomsorg, skola och vuxenutbildning i siffror 2002: Del 2; Svenska Kommunförbundet, 2002, Aktuellt om skola och barnomsorg 2002; and SCB.

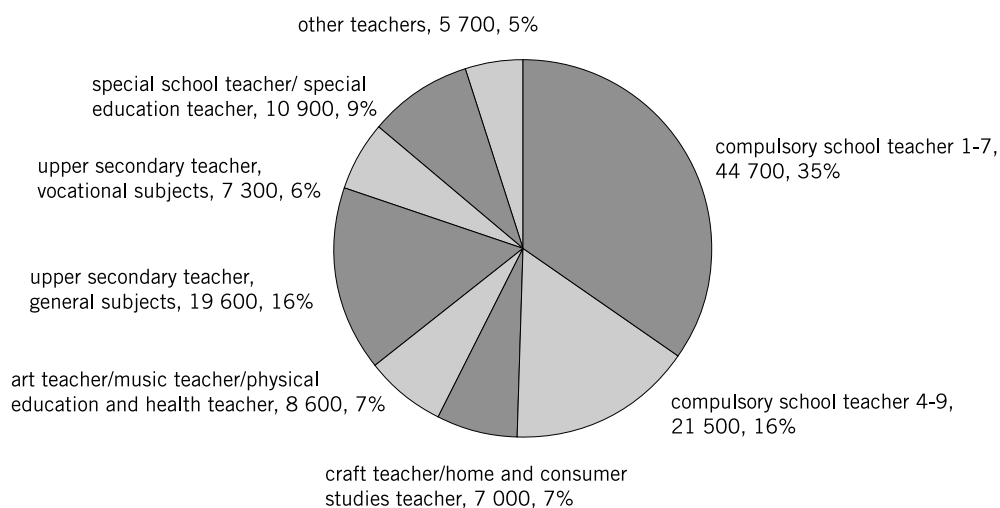
The teaching staff in pre-school classes and compulsory schools consists of compulsory school teachers, pre-school teachers and recreation instructors. About 114,000 staff are engaged in some form of educational activity in compulsory schools today, and 14,000 of these teach pre-school classes.

Table 1. Ratio of certified teachers autumn 2001 (converted as full-time employees).

Type of School	ratio (%)
Pre-schools	52.0
School-age child care	57.1
Pre-school classes	83.3
Comprehensive school	81.8
Special schools for pupils with impaired hearing	74.8
Schools for pupils with learning disabilities	87.7
Upper secondary school	79.2
Adult education	74.8

Source: National Agency for Education

The Distribution of Teachers by category in public schools (2001)



Source: Swedish Association of Local Authorities

Over 30,000 teachers currently work in upper secondary schools. About 4,500 teachers work in compulsory schools for pupils with learning disabilities and about 1,800 in corresponding upper secondary schools.

An increasing number of teachers work in schools run by independent bodies. In the school year 2001/2002 there were 5,400 teachers in independent compulsory schools (about 5 per cent of the total), compared with 3,100 in 1995/96 (about 3 per cent). The number of teachers in independent upper secondary schools has doubled since the 1990s, and in 2001/2002 they represented about 7 per cent of all upper secondary school teachers.

Gender and age structure of the teaching workforce

The teaching profession in Sweden is basically a female profession. 68 per cent of all teachers employed by local authorities in 2001/2002 were women. The greatest gender difference exists among teachers of pre-school classes, 95 per cent of whom are women. Women also dominate at the junior levels of compulsory school (forms 1–7) where they represent 84 per cent of the workforce. At upper secondary school, on the other hand, male and female teachers are evenly distributed. A relatively large proportion of headmasters are men (42 per cent of the total).

A balanced age structure in the teaching workforce is desirable for several reasons. It is not only important from the point of view of staffing, but also so that the pupils can meet adults with different kinds of experience. The age structure among compulsory school teachers is relatively well-balanced in Sweden, since 60 per cent of the teachers are under 50. But in upper secondary schools the average age is higher, with 50 per cent older than 50. This means that a large proportion of compulsory and upper secondary school teachers will retire in the next 10–15 years and will have to be replaced by new teachers.

Pupil-teacher ratios

Following the decentralization reform of the early 1990s the local authorities are responsible for allocating resources for school education. Central government has not laid down any specific requirements as regards the pupil-teacher ratio or the size of classes or groups. Since the 1980s this ratio has been about 12 pupils per teacher both in compulsory schools and upper secondary schools.¹⁰ By and large, the pupil-teacher ratio matches the size of pupil cohorts and the local authorities' financial resources. As was mentioned earlier, the economy was under great strain

¹⁰ Note that this has nothing to do with the size of classes, since teachers' teaching duty does not coincide with the pupils' timetabled lessons.

in the first half of the 1990s. As a result of the recession and the simultaneous increase in the size of annual cohorts, the pupil-teacher ratio gradually increased from the beginning of the 1990s until the economy started to recover around 1995. At present, the average pupil-teacher ratio in local authority compulsory schools is 12.8 pupils per teacher, which is approximately the same level as at the beginning of the 1980s. The corresponding figure for local authority upper secondary schools is 12.4 pupils per teacher. The ratio is about the same, or 12 pupils per teacher, in the relatively new pre-school class system. Local authorities generally try to adjust teaching resources to the needs of various groups of pupils and to their financial resources, which means that in practice ratios differ from one local authority to another.¹¹

The educational background of the staff

Under the Education Act, local authorities must employ persons “whose education meets the main teaching requirements associated with the post”, which normally means a teacher degree from Sweden, a Nordic country or another EU country or a corresponding education approved by the National Agency for Higher Education. Where there are not enough applicants with a teaching degree, local authorities may employ persons with other education on fixed-term contracts. In that case, they are normally employed for one year at a time. Only “if there are no applicants with a teaching degree, special reasons exist and the applicant has equivalent qualifications for the teaching associated with the post and appears to be suited for the task” may local authorities employ persons without teaching degrees on indefinite term contracts.

The demand for teachers has been larger than the supply during the last few years, at the same time as the number of new school entrants has increased, and this has forced local authorities to employ teachers without a teaching degree.¹² As a result, the proportion of teachers with a teaching degree has fallen in all types of schools since the mid-1990s. In 2001/02 the proportion of teachers with teaching degrees was over 80 per cent in upper secondary schools, compulsory schools and pre-school classes. In the mid-1990s the corresponding proportion was about 92 per cent. The number of teachers with teaching degrees in independent schools is considerably lower than in local authority schools. The proportion of teachers

¹¹ The figures for teachers mentioned above include all teachers regardless of the amount of teaching they do. In addition to full-time teachers there are teachers who have part-time posts, perform other school duties alongside their teaching or are employed on an hourly basis, although the figures do not include staff who work less than one month. The figures relating to pupil-teacher ratios are, however, calculated on the basis of full-year posts.

¹² Some of these are employed on fixed-term contracts, and in other cases teachers who were previously employed on fixed-term contracts, but are considered sufficiently qualified to be treated on a par with teachers with a teaching degree, are offered indefinite term contracts.

with a teaching degree in independent compulsory schools was 68 per cent and in independent upper secondary schools 54 per cent in 2001/02. However, the rules governing the employment of teachers in independent schools were tightened up in 2002. The rules concerning teaching degrees are now the same for independent schools as for local authority schools.

The transition from education to the labour market

The proportion of new graduate teachers who are registered as teachers during the school year following graduation is an indicator of the extent to which graduate teachers enter the teaching profession. The entry rate has varied, both over time and between various categories of teachers. Some of the increase in the last few years may be attributable to the fact that the labour market for teachers has improved and the demand for teachers has again increased. During the 1980s the entry rate was under 40 per cent and then fell still further to less than 20 per cent during the 1990s.

Stakeholders

Employer and employee representatives

Most of Sweden's teachers belong to two large teachers' unions: the Swedish Teachers' Union and the National Union of Teachers in Sweden. Headmasters may be members not only of the Swedish Teachers' Union, but of their own association, the Swedish Association of School Headmasters and Directors of Education. The Swedish Association of Local Authorities (SALA) represents the country's 290 local authorities and is thus the dominant employer organization. The agreements between the employer and employee representatives govern working time and other conditions of employment for all teaching staff, including those who do not belong to a union. The collective agreements for independent schools are negotiated separately between the relevant responsible authority and the teachers' unions.

The Swedish Teachers' Union is a professional union for teachers and headmasters in all sectors of the education system from pre-schools to universities. The largest groups of teachers in the Swedish Teachers' Union are compulsory and upper secondary school teachers, pre-school teachers and recreation leaders. Apart from practising teachers, students undergoing teacher education and postgraduate students are also members. The Swedish Teachers' Union currently has 220,000 members. Its main tasks are to negotiate better contractual terms for teachers and

to promote educational development. The Swedish Teachers' Union is one of the largest unions in the Swedish Confederation of Professional Employees (TCO).

The Association of Principals, Headmasters and Educational Administrators is affiliated to the Swedish Teachers' Union. Its members are headmasters and other persons in senior positions in schools, administrative departments and authorities. The Association follows up its members' working conditions and conditions of employment and promotes their interests in professional matters.

The National Union of Teachers in Sweden is a professional association for teachers and studies and careers counsellors and promotes their trade union and professional interests. Its members work in compulsory schools, upper secondary schools, universities and adult education. About 75,000 teachers are members of the Federation at present. The federation also offers many activities for students in its student union LR Stud. Apart from this, there are a number of interest associations that protect the trade union and professional interests of various member groups. The Federation is one of the largest unions in the Swedish Confederation of Professional Associations (SACO).

The Swedish Association of School Principals and Directors of Education is affiliated to SACO and has over 7,000 members. These members work as headmasters, assistant headmasters, directors of education, pre-school headmasters, development managers, education officers and heads of upper secondary or compulsory schools. The Association is both a trade union and a professional association and provides services and support for its members in trade union matters (pay, working conditions etc.) and professional matters (professional ethics, networks etc.). One of its main aims is to make the headmaster profession more attractive in terms of content and duties.

Collaboration

The Swedish Teachers' Union, the National Union of Teachers in Sweden and the Swedish Association of School Principals and Directors of Education collaborate closely on matters of common interest to their members. Among other things, the Swedish Teachers' Union and the National Union of Teachers in Sweden have set up a joint Teachers' Liaison Council, which represents the two unions vis-à-vis local authorities in connection with collective agreements and other central negotiations, as well as in connection with industrial disputes. The Council has in turn concluded a cooperation agreement with the Swedish Association of School Principals and Directors of Education. Apart from this, the Swedish Teachers' Union cooperates with the Association under an agreement relating to headmasters.

Collaboration also takes place through the Public Employees' Negotiation Council (OFR), which is an assignment-based service and negotiating organisation for trade unions with members in the public sector. The OFR allows the trade unions to consult and cooperate with each other on questions of common interest, while retaining their independence.

The Swedish Association of Local Authorities (SALA) is an interest and employer organization for the country's 290 local authorities. At the regional level the local authorities are organized in independent regional federations. SALA's main tasks include looking after the local authorities' interests vis-à-vis central government and upholding the principle of local self-government. The Association's task in the school sector is to create the best possible conditions for the local authorities' provision of school education and child care services. The important tasks in this connection include looking after the interests of local authorities with respect to legislation, official inquiries and committees. The Association also provides support and services for the local authorities and regularly collaborates with other experts on legal, economic and other matters.

'The Swedish model'

The principle of consensus is a central feature of Swedish politics. It is a feature of what is known as 'the Swedish model'¹³, i.e. the willingness to compromise in order to achieve agreement. A central element of this model is that all the parties concerned should have a say. Another important element is that decision-making takes place through talks and consultation. Although the aim is to seek a consensus, the parties cannot always agree and therefore there is not always a consensus on changes in education policy.

Dialogue and collaboration between the various players in the school sector can take place in different forms and contexts. For example, at the central government level representatives of SALA and the teachers' unions often participate as experts in government committees on school policy, for example in connection with legislative revisions. Another opportunity for stakeholders to present their views is as review bodies in connection with official inquiries and government proposals regarding school education. Formal and informal talks are another vehicle of dialogue between the parties. More or less formal negotiations also take place between the Government and other stakeholders in order to achieve agreement on specific issues. In accordance with what is known as the 'funding principle', the Government must not propose reforms that involve financial obligations for the local authorities without also presenting funding proposals.

¹³ SOU 1990:44, Maktutredningen.

Another common form of collaboration takes place in consultation groups of various kinds in which representatives of the parties participate. One concrete example of an informal consultation group is the advisory group that produced this report, in which representatives of various stakeholders took part. Apart from such organized collaboration arrangements, various kinds of meetings and talks offer opportunities for dialogue and consultation between the parties.

At the local authority level and in individual workplaces the Codetermination at Work Act guarantees employees influence over their workplace. In order to take employee participation a step further, the employer and employee representatives concluded an agreement in 1992 called Development 92, which relates to collaboration in the workplace. Under this collaboration agreement, the parties seek by informal means to arrive at solutions to matters concerning workplace conditions. This agreement is currently being reviewed and redrafted.

Agreements

The contractual obligations between employers and employees are the result of central and local negotiations and agreements.

At the central level SALA – the local authorities' employer organization – concludes central collective agreements on the framework for pay and general conditions of employment. These are known as 'recommendation agreements'. SALA's opposite number is the Teachers' Liaison Council. (See 3.4 for further information about this agreement).

Local collective agreements are concluded in each local authority on the basis of the central agreement. These local collective agreements are concluded with each of the relevant teachers' organizations. The agreements cover the planning of efforts in the areas specified in the central agreements. Nowadays, wage formation is also decentralized to the local parties.

Employers and employees do not always agree on the interpretation of agreements. They may also disagree on the extent to which the other party complies with concluded agreements or legislation. Where such doubts are raised, the parties meet for negotiations. If the problem cannot be solved the dispute may be taken to court.

Chapter 3. Attracting capable people to the teaching profession

Sweden needs qualified and dedicated teachers if society's demands on and expectations of school education are to be met. The efforts of teachers are crucial to the quality and development of school education. Attracting suitable people to the teaching profession is therefore an essential task at both central and local government level. Efforts in this area must be broad-based and include various kinds of measures. Basically, it is necessary to ensure that schools are attractive workplaces, and to publicize the fact so that qualified teachers will want to work and continue working there. Wide-ranging development activities are in progress in Sweden at present in order to make the teaching profession more attractive.

Ways of making the teaching profession attractive

Several factors should be taken into consideration in efforts to make the teaching profession more attractive. One issue that has been emphasized by teachers and their unions, and acknowledged by the Government, is the importance of *improving the status of the teaching profession*. One way of achieving this may be to further develop the profession so that teachers have more say in the internal work of schools and their own work situation. Another important element of improving the status of the profession is to maintain common professional ethics. For this purpose the teachers' unions have collaborated in drafting professional ethics for teachers. They regard this as an essential element of their efforts to professionalize teaching and of the efforts to make the profession more attractive.

However, the most important measure when it comes to improving the status of teachers and dealing with the teacher shortage is, according to the unions, to raise teachers' pay. Providing good opportunities for skills development and new career paths in the profession would also help to make it more attractive. The question of introducing teacher certification is being discussed by the Liaison Council mentioned above.

The work environment is another important factor in making the teaching profession attractive, and this is emphasized both by the trade unions and the employer organization.

The teachers' unions mention the need to reduce teachers' workload by employing more teachers in order to improve the work environment. A lower pupil-teacher ratio would also help to increase the safety of both pupils and teachers in school and teachers would be more satisfied with their performance. *Sufficient resources* are essential if a better work environment and working conditions for teachers are to be achieved. This factor is emphasized especially by the teachers and their unions.

School management is another factor whose importance is recognized by the Government. Its importance is also emphasized by the teachers' and employer organizations. An effective and efficient management organization led by competent headmasters makes all the difference when it comes to creating a work environment that both prospective and practising teachers would find attractive and stimulating.

Another important element of efforts to attract the right kind of staff to the teaching profession is a teacher education system that gives both student teachers and practising teachers the opportunity to develop the skills that are needed for the teaching profession today and tomorrow.

A new mandate for teachers

The possibility of attracting suitable people to the teaching profession depends largely on the skills that are required of teachers.

There has been a great deal of discussion in Sweden in recent years of the changes in the work situation of teachers. These changes involve both their duties and methods and the need of new skills in the teaching profession. Rapid social change, the advent and potential of information technology and the multicultural society of which schools are a part are making a major impact on the teaching profession. Owing to the new division of responsibilities in the school sector and the objective-oriented management system which focuses on the attainment of objectives, grades and the quality and equality of school education, the teaching profession is perceived as more important and many-faceted, but also more demanding, than before.

Working in a multicultural society

As a result of migration, cultural diversity is an increasingly prominent feature of Swedish society, which increases the need to understand and respect different cultural identities. In view of the new linguistic, ethnic and religious groups,

teachers are expected to possess broader sociocultural skills. Schools must strike a balance between contributing to cultural consensus and increasing the ability to live with ever greater cultural diversity. The teachers of today must be able to work in a multicultural school and prepare pupils for life in a multicultural society.

Earning authority

The role of teachers as bearers of knowledge and values who aim to create social and cultural encounters appears to be increasingly important, and this makes more demands on ethical and moral behaviour. The role of teachers will be increasingly to encourage personal meetings. Traditionally, their role was to talk to pupils and provide tuition, but this role as an unquestioned authority can no longer be taken for granted. In view of the cooperation arrangements that are being developed and the right of pupils and parents to have a say in school activities, teachers must learn to assume the role of cooperation partners who earn their position by trust, responsiveness and high standards of ethical conduct.

Creating learning environments

The new communication technology affects the practices and content of school education. In an information- and knowledge-rich society, in which information and knowledge are readily available, the role and tasks of teachers are changing. Rather than merely transmitting information, teachers must develop an ability to guide, supervise and critically review information and the way young and adult students assimilate this information. They must be able to place the information in context and originate knowledge together with their students. Instead of deciding the content of their teaching themselves, as was previously the case, teachers are expected, in cooperation with their students, to appraise different kinds of content and competing sources.

Local responsibility

The new role of teachers also calls for broader didactic skills. Teachers must develop their problem-oriented teaching skills and, together with their colleagues, review, evaluate and reconsider their teaching. Exercising local responsibility calls for independent, thoughtful teachers who, together and on equal terms, continuously analyse the documents setting out the school policy objectives and discuss local conditions. Together they must take decisions on matters that they themselves consider of common interest in their professional role. To make the most of this local freedom of action there must be a well-developed dialogue and ability to communicate and translate visions into practical action.

The situation described above shows that a great deal is required in terms of teachers' cognitive, cultural, communicative, social and didactic skills. There is therefore a need to attract suitable people to the teaching profession and ensure that they can acquire the necessary skills.

Recruitment needs

Trends

As mentioned in chapter 1, there have been great variations in the birth rate during the post-war period, with large birth cohorts during the 1940s and 1960s, and then again during the period 1986–1994. Such variations have an impact on the number of children who enter the school system during a given period. The children who were born during the last baby boom are now entering upper secondary schools, which means that the number of upper secondary school students is expected to rise from about 400,000 to over 500,000 up to 2010, after which the numbers will decline. The fertility rate was lower between 1996 and 2001, which means that the number of children of compulsory school age will drop even if there is a slight rise in fertility. According to forecasts made by Statistics Sweden, the number of compulsory school pupils is expected to fall from almost 1,100,000 to less than 900,000 during the abovementioned period.

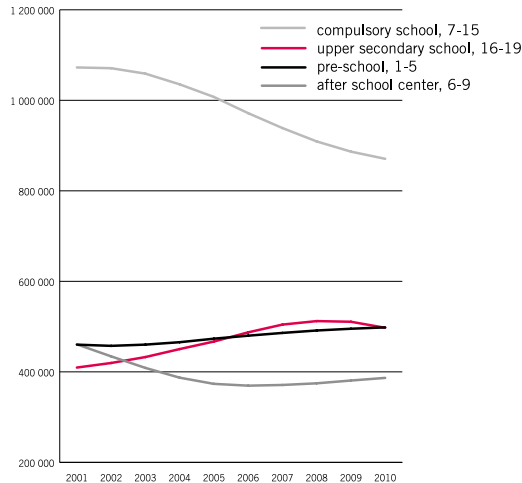
The need to recruit teachers obviously depends on the birth rate. Other factors that affect the demand for teachers are teachers' retirement and the number of teachers who elect to leave the profession for various reasons. All new graduate teachers do not immediately start working as teachers, and some of those who do quit their jobs after a short time. The mobility of teachers between different types of schools also has an impact on recruitment needs. The future pupil-teacher ratio is another significant factor. Improved working conditions in schools and a slowdown in the rest of the labour market might mean that more people would decide to work as teachers and that fewer teachers would leave the profession prematurely.

Increased recruitment needs for certain categories of teachers

In other words, there are a number of factors that determine the number of graduate teachers who need to be recruited. It is clear from a number of studies that recruitment needs at present and in the immediate future are especially large for certain groups of teachers and for teachers in specific subject areas.

The demand for *pre-school teachers* has increased due to the adoption of a separate curriculum for pre-school education, the introduction of maximum child care fees and the introduction of universal pre-school education from the age of four. Parallel with the expansion of the pre-school system, various measures are being taken to improve its quality. There is an increasing demand among local authorities for graduate teachers in pre-school education, as in other types of

Estimation of Number of children/pupils 2001–2010



Source: Swedish Association of Local Authorities

education. A targeted government grant will help to lower the pupil-teacher ratio, which means that it will be necessary to recruit even more pre-school teachers.

For many years there has been a shortage of *mathematics, science and technology teachers* in compulsory and upper secondary schools. Providers of teacher education have therefore been instructed by the Government to take measures to ensure that at least one-third of all teaching degrees are awarded to teachers specializing in mathematics, science or technology.

There is also a great shortage of qualified *mother tongue teachers*. Teachers with this speciality are needed to improve teaching for pupils whose mother tongue is not Swedish. *Teachers of Swedish as a second language* have a heterogeneous educational background, and many of them lack qualifications in this subject. There is also a shortage of *teachers of modern languages*, with the exception of teachers of English.

In connection with their recruitment of school staff the local authorities have discovered a growing need of *special needs teachers*. It has been difficult in recent years to recruit qualified special needs teachers of this category since the number of places in special needs education programmes has been reduced. The focus on special needs teaching qualifications in the revitalized teacher education system and the local authorities' improved economy should lead to increased recruitment of special needs teachers.

The number of *teachers of vocational subjects* who have graduated in the last few years has fallen by 50 per cent compared with the mid-1990s. The baby boomers of the 1980s are now approaching upper secondary school age. There is an obvious need to educate many more vocational studies teachers since there is a shortage of teachers in various vocational subjects. Further measures must therefore be taken to increase the number and availability of teacher education programmes for this category, particularly in the field of industrial education.

There is also a shortage of *teachers of practical and artistic subjects, including art education, craft and home and consumer studies*.

All in all, the need of teachers for *the junior levels of compulsory school* will not increase appreciably up to 2005, although there is a shortage of teachers of certain subjects at *the upper level of compulsory school* (see the table below). The need for *upper secondary school teachers* is expected to increase sharply up to the year 2005 (see the table below).

The need for better gender distribution

As has already been mentioned, the teaching workforce consists mainly of women, and there are no signs of a more even gender distribution in the immediate future. This problem has been identified both at central and local government level and by researchers. To make it possible for pupils to identify with adults in schools and for the benefit of the socialization process in general it is important that the teaching workforce should be representative of the population as a whole. Apart from this, a more even gender distribution might have a favourable effect on the status of teachers, and on pay trends too. Research and economic theory indicate that pay levels tend to be lower in professions that are dominated by women, since women are traditionally less inclined than men to negotiate for higher pay.

The Government Bill *New Teacher Education* (Gov. Bill 1999/2000:135) points out the need for measures to broaden recruitment to teacher education, among other things in order to achieve more even gender distribution. The Government calls for measures to attract more men to the teaching profession and urges higher education institutions that provide teacher education, local authorities and employment services to work together to increase men's interest in the teaching profession. A gender quota system has not been proposed, however, since this would mean that men with lower grades would be given preferential treatment at the expense of female applicants with higher grades.

Table 2. Assessment of recruitment needs and supply of graduates from teacher education programs 2001-2005 (Statistics Sweden and the National Agency for Education).

Educational level Type of teachers	Recruitment needs	Expected number examined	Shortage 2005 number	Expected ratio of non-certified 2005
Comprehensive				
Early years	11500	9600	1900	3%
Later years	17900	6400	11500	28%
Practical-aesthetic subj.	8200	2400	5800	30%
Upper-secondary				
General subjects	10700	4700	6000	24%
Vocational subjects	6100	1500	4600	37%
Practical-aesthetic subj.	2300	600	1700	35%
Total sum	56700	25200	31500	20%

National measures

A number of measures have been taken by the Government, the employer's organization and the trade unions in order to attract suitable people to the teaching profession and thus meet teacher recruitment needs. One important principle underlying these measures is that the recruitment of teachers must be seen in a broad perspective with a view to making schools attractive workplaces, in the widest sense, for both teachers and pupils.

The measures are to some extent interlinked, and they are unique in the sense that the Ministry of Education and Science is taking concerted action with the employer and employee representatives and the central school agency.

Declaration of intent

In August 1998 the Minister for Schools and Adult Education and the Swedish Teachers' Union, the National Union of Teachers in Sweden, the Swedish Association of School Headmasters and Directors of Education and the Swedish Association of Local Authorities signed a declaration of intent regarding measures to promote the development of and recruitment to the teaching profession. An important theme of the declaration was that it is of vital strategic importance for Sweden to recruit competent and qualified teachers to pre-schools, schools and adult education and to retain them.

The declaration emphasizes, among other things, that it is crucial for the future supply of teachers that schools are regarded as more attractive workplaces and that more development activities are needed on the part of local authorities to make new teachers feel welcome. Another aspect that is emphasized in the declaration is the importance of links to research and skills development in order to strengthen the teaching profession.

By signing the declaration of intent the parties concerned have undertaken to promote development in the following four areas: skills development and career opportunities in schools, admission and recruitment to teacher education, collaboration between schools, universities and research bodies, and efforts to make schools attractive workplaces.

A working party that was set up in March 1999 with a view to achieving the aims of the declaration has now submitted a report with proposals. The working party concluded that there was no easy way of guaranteeing the recruitment of qualified teachers, and that what is needed is a combination of measures at both the local and central levels, to which all the parties must contribute.

The working party's conclusions and proposals produced two main results. The first was a recruitment project called Special Teacher Education, which was subsequently greatly expanded. The project is described in further detail in chapter 4. The other project initiated by the working party was a development project involving a large number of local authorities.

The Attractive School improvement Project

The development project, which has been named Attractive Schools, is a unique collaboration project between the Ministry of Education and Science, the National Union of Teachers in Sweden, the Swedish Teachers' Union, the Swedish Association of School Headmasters and Directors of Education and the National Agency for Education, all of which are united in the resolve to make schools attractive workplaces. The project will be carried out during the period 2002-2005 and will be concluded in 2006 with presentations, analyses and evaluations of the experience and knowledge acquired during the project period.

An important point of departure for the project is that attractive workplaces can only be developed locally by concrete efforts. For this reason, all Sweden's local authorities were invited to apply for participation in the project during the initial phase. 34 of the 113 local authorities that submitted applications were selected. In each of the participating local authorities a sub-project has been set up in the local

authority's schools, with teachers and headmasters playing the main part. This arena is a platform for the whole project. Its aim is to disseminate the knowledge and experience acquired during the project. The local authorities are actively preparing both internal and external information about the work being done within the framework of Attractive Schools, partly with a view to ensuring broad support for the project locally, and also to change the attitudes to school of many sectors of the public.

There are many ideas about how to make a success of the Attractive Schools project. Some local authorities have published job advertisements in which they explain that they are taking part in the project in order to attract applicants to work as teachers. Others mention the network of teachers that has been formed and is now actively exchanging experiences and arranging theme days. Most of the local authorities discuss the need of measures to revitalize leadership and emphasize that school heads must be given more opportunity to exercise educational leadership. Cooperation has also been established between schools and business in order to arouse the interest of young people in science and technology at an early stage. The local authorities are also planning to establish career posts that can offer teachers new challenges and opportunities to apply for other posts in the education system.

Central school improvement agreements

One major project at the national level is the school improvement agreements signed by SALA and the teachers' unions within the framework of the two five-year agreements on pay and conditions of employment in the school sector (one agreement expired in 2000 and the other one is currently in force). Under the collaboration agreement between the Teachers' Liaison Council and the Swedish Association of School Headmasters and Directors of Education (see chapter 2) the agreement also covers headmasters and directors of education. The agreements that have been signed break new ground since they focus explicitly on the need for a *development and change process* in today's school system and since the parties have clearly stated that they share responsibility for the development of school education and the attainment of the agreed objectives. Both the employer's organization and the teachers' unions attach great importance to these agreements as a significant step towards attracting, recruiting and retaining teachers.

The parties collaborated on the production of a school improvement package consisting of a five-year agreement that ran from 1995 to 2000 and a '2000 Programme', which included various measures on the part of both the employer and the unions involving cooperation on development and renewal of school

practices. The package included skills development projects for teachers and headmasters, proposals for a more flexible work organization, research, exchanges with business at the local and regional levels and mentoring arrangements for teachers.

The present agreement runs from April 2000 to March 2005 and builds on the first agreement. It is adapted to the system of management by objectives that has been adopted by central and local government for the school sector, whose purpose is to strengthen the teachers' professional influence. The basic idea is that teachers will develop school education by deciding how the objectives set by central and local government are to be achieved and how these efforts are to be organized. The areas for improvement mentioned in the agreement are efforts with regard to pupil influence, work organization, working time, the work environment, skills development for teachers and induction programmes for new staff for the purpose of improving the attainment of school policy objectives. (The contents of the agreement with respect to these matters is dealt with in greater detail in chapters 5 and 6).

The current agreement is based on the assumption that local agreements will be drafted during the contractual period. The agreement links better attainment of objectives to good working conditions for teachers. The details are set out in the local collective agreements in provisions designed to bring about improvements in specific areas. The parties will set up a development group at the local level for the purpose of monitoring the results and innovations achieved in pre-schools and schools.

The intention of the employer and employee representatives at the central level is to strike a balance between tasks and resources. The limiting factors as regards school improvement and organization are the operational goals and the teachers' and pupils' work environment. The pace of development cannot be faster than local conditions allow. Conditions in schools will therefore be discussed in parallel with discussions of objectives. These conditions include economic aspects, work organization, human resources policy, the work environment, premises and equipment.

Council for the Attainment of Objectives and Future Development of School Education

The parties to the teachers' agreement – SALA and the Liaison Council (the Swedish Teachers' Union and the National Union of Teachers in Sweden) – decided in connection with the conclusion of the agreement to appoint a joint national Council for the Attainment of Objectives and Future Development of School Education. The Council will monitor and evaluate the progress made by pre-schools and schools in improving the attainment of objectives during the contractual period 2000–2005.

Evaluation

The National Swedish Federation of Teachers and the Swedish Teachers' Union are currently performing an in-depth joint evaluation of the current agreement in order to find out what efforts have been made in the six areas for improvement mentioned in the agreement (working time, the work environment, work organization, skills development for teachers, induction programmes for new staff and pupil influence). One of the aims of the in-depth study is to identify obstacles and success factors in local efforts to implement the agreement. The evaluation will form the basis of opinion-forming activities with respect to the situation of teachers and for the initial work of designing future agreements. (Some of the results of the first year's in-depth study are presented in chapter 6).

SALA is conducting a project during the contractual period entitled School improvement – An Investment, the purpose of which is to actively support the local authorities in their efforts to pursue the aims of the agreement, i.e. better attainment of objectives. The Association will also perform an evaluation of the agreement. An important task in this connection is to monitor and evaluate the effects of the present agreement and the signing of local agreements (which is an integral part of its design) on local development activities and on the attainment of objectives.

Other measures

Apart from the large-scale projects mentioned above, other measures have been taken at the national level in order to stimulate the recruitment of teachers and the development of attractive schools.

In April 1998 the Government decided to support development projects for teachers in 168 selected schools. They received grants totalling SEK 75 million for their suggestions for development activities in individual schools. The overall objective of these projects was to develop theoretical teaching skills. Other aims included improved cooperation between teachers, regional development centres and higher education institutions. This initiative provided input to the debate on education, and educational discussion flourished in the individual schools as a result. Cooperation with higher education resulted in the introduction and use of new methods in many schools. Teachers' systematic review, evaluation and reassessment of their teaching was one example of this. The National Agency for Education has been instructed to evaluate these projects.

Funds for staff increases

The economic crisis, especially during the early 1990s, affected both pupils and staff. Available resources were reduced at the same time as the number of children

in pre-schools and compulsory schools increased sharply. Staff-pupil ratios deteriorated even as many school reforms were being implemented. The work situation became more difficult for both children and adults at school. As a result, the Government decided in December 2000 to award targeted grants to local authorities to enable them to hire more staff for schools and after-school care centres. These funds are to be used for staff reinforcements, for example teachers and special needs teachers, who can help schools to achieve their targets. This effort is an integral part of the efforts being made to enable pupils to achieve the knowledge targets for school education. Increasing the number of adults in this way also improves the chances of doing a good job together with others and sharing duties with more colleagues. This is an important element of a good work environment and good working conditions.

Applications for these grants can be submitted during a five-year period, and the programme is expected to add about 15,000 people to the school workforce. Altogether, the government grants to local authorities will increase by SEK 5 billion as a result of this programme.

A Better Job

SALA implements staff and skills supply projects. One of these is the project A Better Job. The aim of the project is to support local authorities in their efforts to recruit and retain staff. It aims to provide concrete and active support both for the local authorities' own development projects on leadership and work organization and for efforts to influence attitudes to local government employment, both internally and externally. There is an obvious need for information and attitude influencing. The focus of the project is on leadership, active staff participation and communication. Among other things, there are plans for a youth magazine that will aim to give a more favourable impression of public sector workplaces.

Leadership development

The duties and work situation of headmasters and directors of education has received a great deal of attention in Sweden in recent years. There have been great changes in their duties compared with only a few years ago. In connection with the decentralization of responsibility and powers in schools at the start of the 1990s, headmasters have been assigned overall responsibility both for teaching and other educational activities and for administrative and organizational matters. New curricula, syllabuses, grading systems and grading criteria, as well as responsibility for quality statements, also involve new and more tasks.

The Government has therefore initiated a number of programmes to stimulate the debate on the work situation of headmasters and to contribute to development of the headmaster's role. One example is an official inquiry that was appointed in 2001 to investigate the need of democratic, learning and communicative school leadership in Sweden¹⁴.

SALA has also launched a number of projects in order to strengthen and develop leadership in local government. One of these projects was a *top manager programme* for chief officers that focused on leadership in a politically controlled organization, the leadership role as such and this role in relation to third parties. Strengthening and developing the leadership role of the top managers will increase the impact of future leadership development programmes.

Communicative leadership is another development programme for local government heads of sections, such as headmasters. The development programme is based on the view that dialogue, communication and relationship-building are important features of the leadership of the future.

¹⁴ The conclusions of the inquiry is summed up in the report *Lärande ledare – Ledarskap för dagens och framtidens skola*, Utbildningsdepartementets skriftserie, nr. 4, 2001.

Chapter 4. Educating, developing and certifying teachers

Teacher education is an important means for the Government and Parliament to maintain national objectives and achieve high quality in school education and equal quality throughout the country. Great changes have taken place in the teacher education system in Sweden in the last few years in order to meet the need for qualified and well-educated teachers.

The importance of teacher education when it comes to attracting and recruiting suitable people to the teaching profession is strongly emphasized both by the Government, the employer organization and the trade unions. Among of the issues that have been mentioned in this connection is the importance of linking this education more closely to school practice, the importance of ensuring that the education has a sound scientific basis and the need for closer links between teacher education and school education research. Another matter that has been mentioned is the importance of developing flexible teacher education programmes that offer practising teachers opportunities for developing their skills.

Teacher education integrated into higher education

Quality requirements and organization

Since 1977 all teacher education in Sweden has been integrated into higher education. During the 1990s the education sector as a whole underwent several reforms. In 1993, the universities and university colleges were decentralized, which meant new responsibilities but also greater freedom for the individual institutions. Today, control of higher education is exercised by means of a Degree Ordinance, in which the Government specifies the requirements that must be satisfied for the award of degrees. As long as an institution is deemed to meet certain quality standards, it is free to design the education it provides on the basis of its own assessment of the content and scope of this education. The National Agency for Higher Education is responsible for ensuring that quality standards are maintained by carrying out regular quality inspections. If it finds that an institution does not meet the quality standards for a certain programme, it can withdraw its right to award degrees.

Teacher education programmes are provided at 24 of Sweden's over 40 universities and university colleges, which are spread out among all Sweden's regions. There must be a body with overall responsibility for teacher education at all universities and university colleges that provide such education.

Teacher education is financed, like all higher education, out of public funds, and students can finance their studies with state study grants and loans. Students must have basic eligibility for higher studies to be admitted to teacher education. The admission requirements may, moreover, vary depending on the subject area chosen by the student. Students may choose a subject area either when they start the programme or later on.

Graduation targets

The Government sets targets for the number of teaching degrees and specifies the programmes that are prioritized with reference to political objectives and the needs of the labour market. It also regulates the number of places by means of resource allocation, i.e. by setting a maximum allocation for each institution which determines the number of students that can be admitted. The resources allocated to the institution depend directly on the number of students in different subject areas and on these students' performance. This allows the Government to determine the number of students in a given area. Since the number of school pupils will increase substantially in certain age groups in the next few years at the same time as many teachers are due for retirement, there is, as mentioned before, an urgent need to recruit more teachers to schools. The Government has therefore substantially increased the graduation targets for the period 2001–2004 and contemplates an expansion of teacher education programmes for the planning period 2005–2008. The number of students in teacher education has already increased by 20 per cent between the autumn term 2000 and the autumn term 2002.

Student teachers

Interest in higher studies and in specific disciplines depends to a certain extent on the situation in the labour market and the relative attractiveness of different professions, but also on the design of the education programmes. During the boom of the late 1990s the number of applicants for higher education dropped. However, this trend has now been reversed and the number of applicants is on the increase again. One reason for this is probably the labour market situation. Teacher education programmes are among the programmes for which the number of applicants has increased most. The reason for this increase may be that the number of teacher education options has doubled following the introduction of the new teacher education system.

Gender and age structure

Most student teachers are women (73 per cent), and in some programmes, such as those for special needs teachers and the junior levels of compulsory school, the proportion of women is around 90 per cent. There is a much more balanced gender distribution among prospective upper secondary school and vocational studies teachers, 42 per cent of whom are men. But over the years the percentage of female students in these programmes has increased too.

About half the student teachers are in the 20–25 age bracket, while a quarter are aged between 26 and 35 and another quarter are over 35. Generally speaking, the number of older students has increased, especially in programmes for compulsory school teachers.

A new teacher education system

Background

The need to change the teacher education system was first discussed during the latter half of the 1990s. One of the reasons for this was the wide-ranging reform of the education system and the new teaching skills that were now required. Another reason was the great changes that took place in the higher education system, of which teacher education is a part. A parliamentary committee was therefore appointed in 1997 to present proposals for a new teacher education system.

The Teacher Education Commission presented its report *Learning and Leading* (SOU 1999:63) in 1999, and after the customary review procedure the *New Teacher Education Bill* was presented to Parliament in May 2000 (Gov. Bill 1999/2000:135)

The teachers' unions took part in the elaboration of the new teacher education system. The presidents of the teachers' unions were frequently consulted at the committee stage, and they in turn discussed the issue in their own organizations. The unions were also contacted during the drafting of the bill. Consequently, when it was presented to Parliament it had the support of the teachers' unions.

The new teacher education system, which was launched in the autumn of 2001, is very different from its predecessor as regards content, design and organization. The new teacher education structure includes a much larger common basic component, and opportunities are provided for practising teachers to take basic

courses to improve their qualifications. The purpose of the reform is to create a teacher education system that is more closely linked to the reality of school life that the new graduates will meet when they take up a job in a school. The cornerstones of teacher education are in-depth knowledge of the chosen subjects, more research on learning and a thorough grounding in education science for all prospective teachers. The reform also provides for an expansion of education research.

One important change in the new teacher education system is that the teaching degree awarded to those who complete the education replaces 8 of the previous 11 teaching degrees. This means in practice that the degrees for compulsory school teachers have been abolished. The purpose of this single teaching degree is to allow greater flexibility when it comes to educating teachers in a variety of subject areas and with a variety of skills profiles, as well as offering opportunities for further education.

Organization and content

The period of study in the new teacher education system varies between three and five and a half years depending on the type of degree. For teachers in pre-schools, pre-school classes, the junior level of compulsory school and school-age child care and for mother tongue teachers the number of credits required for a degree is 140 (which corresponds to 3.5 years of full time study). For the forms 4–9 of compulsory school and for upper secondary school the requirement is 180–220 credits (4.5–5.5 years). For prospective vocational studies teachers in upper secondary schools the requirement is 120 credits (3 years) and good professional qualifications.

The new teacher education system consists of three components. One of these is the *general field of education*, which comprises both disciplines that are central to the teaching profession and interdisciplinary subject studies. Matters relating to learning, teaching and special needs teaching are examples of key areas within this component. Another important area is the profession's social mandate, which has to do with matters such as democracy and values. This compulsory component of the education provides common basic skills for all student teachers.

The second component of teacher education consists of studies *on a particular subject or subject areas*. This allows students to choose their own teaching profile. The options include traditional subjects, such as English or mathematics, but may also consist of interdisciplinary studies of thematic subject areas. Subject-related didactics is an important element of whatever field of study is chosen. Students may choose a subject area either when they start the programme or later on.

The third component of teacher education is *specialization*. This allows students to

specialize their teaching profile still further. It may consist of in-depth study of a subject or a non-subject-related supplementary specialization. They may, for example, specialize in a particular age group, adult education, reading skills etc.

Students must also produce an independent theses, in which they demonstrate that they can apply scientific methods and theories. The degree project is an important element when it comes to developing a scientific approach. It therefore provides preparation for postgraduate studies, as well as for the students' future professional career, when they will be expected to take part in their school's development activities.

The general education and subject study components include *work located education* to give students the opportunity to develop their professional skills. The work located education lasts 20–30 weeks and are now more closely integrated into the education than previously. The schools are engaged as cooperation partners with universities and university colleges, and the student teachers are usually placed in a school with which they keep in touch throughout their teacher education period.

Basic principles underlying the new teacher education programme

Consensus and flexibility

One purpose of the general education component of teacher education, which is basically the same for all students, is to encourage development of a common approach and cooperation between teachers with different specialities. The aim is to prepare the teachers to cooperate with other teachers with different specialities in order better to meet the various needs and experiences of pupils. It is also hoped that the freedom of choice and flexibility will help to make teacher education attractive among students.

The design and structure of teacher education, with three components in a common framework, also increase teachers' opportunities for supplementing their education, for example to enable them to switch to another teaching field. This kind of flexibility may prove especially useful in view of the differences in the size of annual cohorts and thus of the number of pupils, and the resulting changes in the need for teachers with various specialities. This structure also increases the opportunities for practising teachers to develop their skills in the perspective of lifelong learning. One advantage of this is the opportunities it offers for undergraduate students and practising teachers to meet. Another advantage of the flexible structure is that it makes it possible for students to complete their degree after interrupting their studies.

Scientific basis and professional knowledge

Like other types of higher education, teacher education must rest on a scientific foundation, and the design and content of the education must be related to the future practice of that profession. While students need to acquire a knowledge of their subjects and a scientific approach, teacher education must be based on practical experience of teaching and learning. The idea is that the meeting between science and proven experience will improve the quality of teacher education. For this to happen there must be close links between teacher education and school practice, and also with research.

Work located education

One explicit ambition of the new teacher education system is to strengthen the work located education component in various ways. The aim is also to link subject studies closer to practical experience in schools. Theoretical studies are to be linked to practical teaching so that proven experience and scientific knowledge combine to help develop the principles and practice of teaching.

The students study educational activities at a school for a sufficiently long period to acquire an understanding of local conditions. Working together with a teacher team gives them the opportunity to participate in and familiarize themselves with the collective performance of a teacher's various duties. They take part together with the team in all educational activities, such as planning, teaching and evaluation, as well as taking part in seminars, projects and various kinds of presentations that are arranged for the students at the partner school.

The collaboration between the local authorities and the universities on the work located education component of teacher education is important for school improvement. It gives the local authorities opportunities for skills development in various subject areas that benefit all parties. The encounters between university teachers and school teachers enhance improvement in areas such as subject-related didactics and build a consensus on the education of the students. The students are an asset for teacher teams and can contribute to development, for example, by choosing an area that is relevant to the school for their degree project, thus contributing new knowledge.

Research and postgraduate studies

Ever since 1977, when teacher education was integrated into the higher education system, it has been somewhat isolated from other higher education programmes and research. One reason often given for this is that, to start with, teacher education was organized in the form of seminars, and this system is still applied in some universities and university colleges. The passing of the Bill *New Teacher*

Education in October 2000 strengthened the status of teacher education by requiring higher education institutions to set up a body that is specifically responsible for teacher education. This body has overall responsibility for basic teacher education and for research and postgraduate studies related to such education. Another measure was to allocate research funds specifically for teacher education.

In the Bill the Government emphasized the need for research on education science and called upon universities and colleges that provide teacher education to take measures to strengthen education research and postgraduate studies. It is in the public interest to increase the proportion of teachers with PhDs both in higher education and in schools in view of the small number of teachers with such qualifications.

The Bill *Research for the Future – A New Organization for Research Funding*¹⁵ proposed setting up a Swedish Research Council to be responsible for research funding. The Government proposed that an *Education Science Commission* should be set up within this Council. The funds made available to the Commission have substantially increased the research funds in the field of education. These funds and the establishment of special bodies for undergraduate education and research have greatly increased the volume of education research. New graduate subjects directly related to teacher education have been introduced at universities and colleges with research and postgraduate programmes, and researchers are recruited from teacher education programmes¹⁶.

The structure of the new teacher education system also makes it easier both for student teachers and practising teachers to continue their studies in postgraduate programmes and eventually do research on their own. The Government has funded several projects in order to develop models for this purpose.

Regional development centres

With a view to improving contacts between higher education, schools and the community at large, the Government proposed in the 1997 Budget Bill that the universities and colleges that provide teacher education should set up regional development centres. The purpose of this was to encourage collaboration between higher education, schools and working life at the local and regional levels. The employer and employee representatives are often represented in these centres.

¹⁵ Prop. 1999/2000:81, *Forskning för framtiden – en ny organisation för forskningsfinansiering*, Utbildningsdepartementet, Stockholm.

¹⁶ Fransson, K, and Lundgren, Ulf P., 2003, *Utbildningsvetenskap såsom vetenskap/er*, Vetenskapsrådet, Stockholm.

Two of the main functions of these centres is to disseminate research results so that they can be put to practical use in school education and to raise school issues of current concern in connection with the teacher education programmes provided by universities and colleges and learning research programmes.

Evaluation and future measures

The National Agency for Higher Education will evaluate the reformed teacher education system in 2004. This evaluation will include an analysis of the effects of the changes in the system. Major changes in the current system will only be made after this analysis. There are, however, signs that the current teacher education system is not always sufficiently demanding and does not occupy enough of the students' time. A study of the time spent by students on learning indicates that student teachers spend less time on learning than students in three other professional education programmes¹⁷.

Eventually, as the scientific basis of teacher education is strengthened, the knowledge generated by education research will be used as a basis for new measures. It may also help to further develop the measures that have already been taken. The intensification of research may also lead to the discovery of uncharted areas and prioritization of new research needs.

Special recruitment and education measures

As mentioned earlier, there is great interest in the teaching profession in Sweden. Nevertheless, like many other countries, Sweden has recruitment problems in mathematics, science and technology and one or two other fields. In the Bill *A new System of Teacher Education* the Government mentioned the need to take measures to ensure broad recruitment of teachers in all teaching disciplines and a teaching workforce that reflects the composition of the population as far as possible. In 1999, the Government initiated measures within the framework of teacher education in order to achieve a short-term improvement of the recruitment situation.

One way of increasing recruitment to the teaching disciplines and subject areas where there is a shortage of teachers is to increase the number of teacher education places, and this is now being done. This will make a long-term impact. In the short term, measures are being taken to train more pre-school, mathematics, science and technology teachers, as well as mother tongue teachers and teachers of

¹⁷ Lundgren, Ulf P., 2001, *Tid för studier: En jämförelse mellan fyra yrkesutbildningar*, Högskoleverket, Rapportserie 2001:15R.

Swedish as a second language. Apart from this, special programmes have been set up to increase the number of vocational studies teachers and the number of places in continuation courses in special needs education etc.

Special teacher education programmes

Some universities and colleges were selected to educate teachers under the *Special Teacher Education Programme*. This programme will last from 2002 to 2006. During this period people with suitable university qualifications and varied professional experience will divide their time between teacher education and work in a school. Much of the education offered by this programme is distance education. The programme is being implemented in close collaboration between local authority employers and universities and colleges.

The 60-credit programme (corresponding to 1.5 years of full time study) will lead to a complete teaching degree or complement an existing teaching degree in order to diversify the qualifications of individual teachers, thus increasing their employability. This programme has demonstrated the importance of properly recognizing relevant previous studies and professional experience, as well as the need to develop more flexible types of education. The programme has made it possible for many unqualified teachers to complete their education and take a teaching degree. For many of the participants, the combination of studies and a teaching job and the opportunity to alternate between theory and practice and maintain a foothold in the labour market are particularly attractive features. For many, employment as a teacher is essential for them to be able to finance their studies. So far, the places in the programme have been taken by students who are keen to take the opportunity to work in a school while qualifying as teachers, followed by the prospect of a permanent teaching post. About 4,000 people are expected to take a teaching degree by the year 2006 under the Special Education Programme.

Interest and participation in the programme have increased ever since it started as a small-scale pilot project in 1999. Over 3,700 applications have been received since the spring of 2002 from more than 200 of Sweden's 290 local authority areas.

Almost half the students who take the programme are pre-school teachers or recreation leaders who wish to qualify as teachers of forms 1-7 of compulsory school. Many students already work as compulsory school teachers. About 40 per cent of the students have studied school subjects and complete their education with courses in education, didactics and teaching practice so that they can take a

teaching degree. This group includes prospective teachers in compulsory schools and upper secondary schools and teachers of vocational studies, practical and artistic subjects and various subject areas. The programme also provides supplementary qualification courses, such as mathematics for teachers of forms 4-9, mathematics for vocational studies teachers, Swedish as a second language, special needs education etc. These teachers are complementing their teaching degrees, which will enable them to meet changes in the age and subject structures in schools.

Foundation year programme

Since the early 1990s Swedish universities and colleges have provided foundation year programmes, i.e. supplementary education programmes in science and technology. This year enables students who lack the required previous knowledge for science and technology studies so that they can acquire the necessary qualifications. The programme is above all intended for those who have taken social science or economic programmes at upper secondary school and have become interested in science and technology subjects after leaving school. The purpose of the programme is to increase recruitment, especially of women, to science and technology programmes. The foundation year programme was set up in response to an expected shortage of people with a science and technology education.

The foundation year programme appears to have been very successful in attracting students to science and technology programmes at university level. There were more than 3,000 foundation year students during the academic year 2001-2002. Many teacher education students specializing in science and technology started by taking the foundation year programme. Experience so far shows that about 40 per cent of the students who complete the foundation year programme go on to take a teacher education programme.

Other recruitment measures

The Government has also supported other recruitment projects. Among these are recruitment and study guidance projects for *officers* who want to switch to the teaching profession. Other projects include study guidance measures and a foundation year to attract *more men to the teaching profession*. Among other things, several projects are in progress for the purpose of encouraging the recruitment of men who have experience as youth leaders, sports leaders etc. They have been offered a preparatory education programme, after which they will be exempt from certain entrance qualifications.

Many well-educated employees lost their jobs due to the restructuring of the electronic and other sectors in early 2000. They have been given the opportunity

to take a shortened teacher education course. About 10 engineers have completed this course so far, and a project for 200 engineers is being prepared.

Another initiative designed to increase the number of science and technology teachers is a government-sponsored project combining teacher and engineering education. Resources have been allocated to The Stockholm Institute of Education and The Royal Institute of Technology for the purpose of collaboration on the development of a programme offering new teacher education specializations, degree titles etc. This project will run for five years.

Special recruitment efforts have also been made to ensure that the teaching workforce reflects our multicultural society. These include a preparatory year with studies in Swedish and certain pre-teacher education subjects for young people with an immigrant background. Students who complete this preparatory year are guaranteed a place in teacher education.

Teachers with foreign teacher education

The National Agency for Higher Education assesses the foreign higher education qualifications of applicants who wish to practise a profession in Sweden. The purpose of these assessments, which started in the mid-1980s, is primarily to enable people with a non-Swedish education to get jobs that correspond to their qualifications.

The teaching profession is a 'regulated profession' in Sweden. The Education Act was amended in January 2000 in response to the EC Directives on mutual recognition of professional qualifications, and the National Agency for Higher Education was appointed the competent authority for the teaching profession in Sweden. The purpose of the Directives is to promote mobility with regard to service provision between the EU's Member States. As the competent authority, one of the Agency's tasks is to assess foreign teacher education and professional experience of teaching and to issue certificates of eligibility to those who meet the requirements according to the Agency's rules.

The Agency has processed a large number of applications during this first period. More than 600 certificates of qualification for the teaching profession were issued during the period July 1 2000 to July 1 2002. This has made a large number of qualified teachers available for the local authorities. The largest group of newly qualified teachers consists of mother tongue teachers, which is good news since there is a lack of qualified teachers in this field in Sweden. But it has proved difficult for applicants to qualify for other posts on account of the great

differences in the scope and content of foreign higher education programmes in comparison with the Swedish teacher education system.

An evaluation carried out by the National Agency for Higher Education indicates that there is a need for a carefully designed and effective induction period for foreign teachers and of supplementary education to allow foreign teachers and other university graduates to complete their education so as to obtain a teacher qualification.

Chapter 5. Recruiting, selecting and employing teachers

As a result of the decentralized school education system the local authorities are now the employers of all school staff and consequently have sole responsibility for recruiting staff. Many of the decisions on these matters are made at school level.

Recruiting teachers

At school level, it is the headmasters and other members of the school management team who are responsible for recruiting staff. Schools can, in connection with job advertisements and in other ways, describe their activities and attract the staff who are most interested and most attractive to the employer.

At present, local authorities find it difficult to recruit qualified staff for teaching posts. This is the conclusion that may be drawn, *inter alia*, from a questionnaire survey among local authorities that was carried out by SALA in the spring of 2002 for the purpose of obtaining an up-to-date picture of the recruitment situation for various categories of teachers. The survey shows that about half the local authorities found it difficult to recruit staff with the required education to both pre-schools and compulsory schools (SALA 2002).

One aspect that is mentioned by the teachers' unions as especially important when it comes to facilitating the recruitment and assignment of new teachers and the retention of existing teaching staff in the profession is the need to improve the conditions of employment that they are offered. Improvements are needed in both salaries and working hours. Another measure recommended by the unions is a clearer definition of teachers' duties and the qualifications required in this respect.

From the point of the school authorities the question of teachers' formal and real qualifications is central to the recruitment of new teachers. SALA states that it is difficult for local authorities to meet their obligations since the legislation requires them to employ teachers with teaching degrees despite the fact that there is a shortage of such teachers. The purpose of the measures recommended by SALA

in this connection is to enable people with varying educational and skills backgrounds to work as teachers. SALA emphasizes the importance in this connection of developing validation instruments that can assess people's real skills. Other measures that SALA considers important and desirable include encouraging suitable and competent people with another professional background to switch professions and work as teachers for a certain period during their careers in order to take advantage of the special skills of foreign teachers, enabling them where necessary to supplement their education.

Selecting teachers

Under the Education Act (chapter 2, sections 3 and 4), local authorities must employ teachers who have the formal qualifications to meet the teaching requirements associated with the post. This means a teacher degree from Sweden, a Nordic country or another EU country or a corresponding education approved by the National Agency for Higher Education.

Teachers with a foreign teaching degree can obtain the necessary qualification too. Under section 4 (b), a teacher whose mother tongue is not Swedish or one of the other Nordic languages can only obtain a teacher qualification if he or she has the necessary knowledge of Swedish. Prior to 1999, the requirement was for non-Swedish teachers to have a good command of Swedish. The new rules have made it possible for a large number of teachers with a foreign background to become qualified to teach in Swedish schools. This is very desirable in view of the need for the teaching workforce to reflect the composition of the pupils.

If qualified applicants are not available, local authorities may employ persons with another background on short-term contracts. Persons without a teaching degree may only be appointed under indefinite term contracts if none of the applicants are qualified teachers and if special reasons exist, in addition to which the applicant must be considered suitable and have the necessary qualifications for the post.

As of July 1 2002 (see Gov Bill 2001/02:35) independent schools are subject to the same requirement to employ qualified teachers as local authority schools, which was not previously the case.

The staff in pre-schools are not subject to the same qualification requirements as teachers of school-age children. Under the Education Act (chapter 2a, section 3), the staff of pre-schools must have qualifications and experience that are sufficient

to meet the children's need of adequate care and teaching. However, there are no specific requirements in terms of education or qualifications. The policy in many local authorities is to ensure that there are staff with teaching degrees in each unit and teacher team that works directly with children. But the proportion of teachers with such qualifications varies between different local authorities. One explanation for these differences is the difficulty of recruiting staff with the required teaching degrees.

Ongoing discussion

One matter that is now being discussed in the school sector, on which the employer and employee representatives are not in complete agreement, concerns the requirements that must be satisfied by teachers in order to provide the required education. According to the teachers' unions, certain duties, such as grading, should only be performed by holders of a teaching degree. The employer's side, however, advocates the introduction of an external examination in which teaching qualifications are determined in relation to professional requirements rather than being an automatic consequence of the applicant's education, as is the case at present. In the employer's opinion, it should be possible to employ staff with qualifications other than teaching degrees to perform teaching duties in schools.

Employing teachers

Types of employment contracts

There are different types of employment contracts for teachers, as for other personnel. Most teachers are employed under *indefinite term contracts*. Teachers employed under such contracts are covered by the Employment Security Act (SFS 1982:80), which means that they can only be given notice of dismissal on one of the grounds mentioned in the Act, such as lack of work.

Newly qualified teachers are automatically employed *for a probationary period* for the first 12 months. This type of employment normally leads to an indefinite term contract. The object of this system is to give newly qualified teachers an induction year under the supervision of an experienced teacher.

Teachers can also be employed under *fixed-term contracts*. This is the normal type of employment for teachers who do not have a teaching degree. Under the Education Act, persons who do not meet the statutory requirements for

employment as teachers under indefinite term contracts may only be employed for a maximum of one year at a time. (See also the qualification requirements described above in section 5.2).

The headmaster or another member of the management team is responsible for employing teachers, but is normally assisted in connection with recruitment by a group consisting of teachers and other staff. Sometimes pupils also take part in the recruitment process. The employment procedure is basically the same as in other sectors.

Agreements

The conditions of employment for teachers as regards pay and working time are governed by agreements between the employer's organization and the teachers' unions. SALA has concluded two 5-year agreements with the teachers' unions. As mentioned earlier, the main focus of these agreements is the development and change process now under way in school education, which is the joint responsibility of the parties concerned, but the agreements also deal with working time and pay systems. (See also chapter 3).

The first agreement

The first agreement, which entered into force in 1995 and expired in 2000, involved great changes in teachers' working time and pay systems. The previous working time system, according to which the various categories of teachers a centrally regulated teaching duty, has been phased out. In the new system teachers' working time is divided into two components, i.e. regulated and unregulated working time. Regulated working time corresponds to over 70 per cent of total working time. During this time teachers must be at their employer's disposal, which normally means they must be in school. Unregulated working time is the time during which teachers work on their own initiative. It is primarily intended for preparation and follow-up, spontaneous contacts with pupils and parents, and personal development. All other duties should be performed during regulated working time. The reason for these changes was the need to eliminate obstacles to a more flexible approach to pupils' learning.

The second agreement

The second agreement, which entered into force on April 1 2000, is a further development of the first agreement. In view of the fact that an increasing number of pupils do not achieve the objectives of school education the parties have, jointly and separately, undertaken to improve the attainment of objectives and

consequently results in Swedish school education. The agreement as a whole is based on this idea. In order to emphasize the importance of improving the attainment of objectives, the agreement links improved performance to better working conditions and pay increases.

In order to emphasize the importance of joint responsibility for improving the attainment of objectives, the pay system for teachers and headmasters is based on *individual performance-related pay*. The more flexible working time model and pay system place great demands on the local authority's management at various levels. The success or failure of this process largely depends on this management.

Working time

Teachers have the same working time as other full-time employees, but their working year consists of 194 working days compared with 220–228 for other employees. This means that their working day is over nine hours long. Since 1995, seven of these hours on average have consisted of regulated working time. The other two or more hours consist of unregulated working time. The regulated working time, when teachers are at the disposal of their employer, coincides broadly with the pupils' school year. The working year is divided into at least three settlement periods in order to ensure a balanced workload. Overtime is compensated at the end of each settlement period.

Teachers' regulated working time includes 104 hours (as an indicative value) for skills development per full-time employee per school year. The aim is to ensure that a sufficient amount of time is set aside for skills development and that teachers have more say in their skills development. The number of hours per individual and the content of skills development is to be based on the needs of the school and the individual. The parties have agreed that staff conversations should take place at least once a year to facilitate planning for future skills development needs.

Pay

The introduction of individual pay for teachers means that the previous fixed pay scheme with pay ladders has been abolished. One reason for this was to improve the recruitment and retention of teachers, to link pay to performance and to address labour market pressures on teachers' pay. The parties agree that skilled teachers should have good pay. Pay levels are determined by the school management.

The current pay system offers great possibilities, but no guarantees as regards the individual teacher's pay trend. The pay agreements now in force only specify a guaranteed minimum salary after one year's employment. Pay is discussed when a

new teacher is hired, and the teacher and the employer agree on the salary to be paid on commencement of the term of employment. Salaries are subsequently revised once a year in local negotiations.

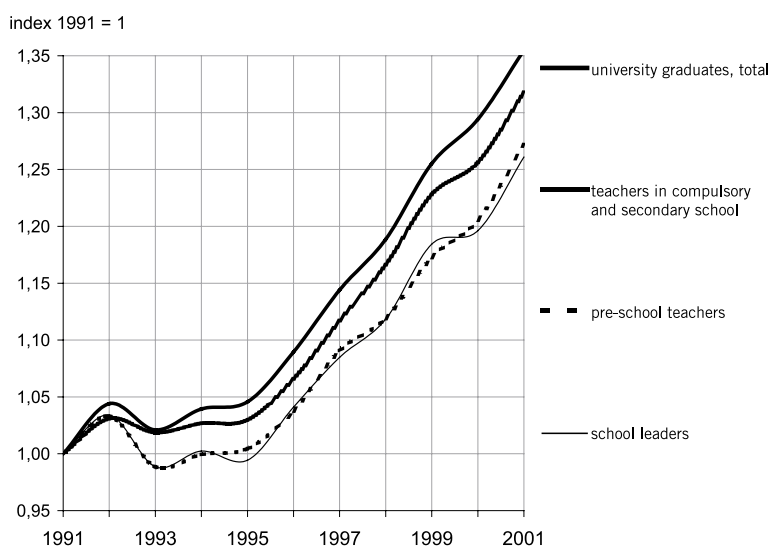
Pay trends

Teachers' pay has lagged behind that of other professional groups with a similar education profile. The parties clearly state in the central collective agreements that there is a need to improve results in pre-schools and schools and to ensure satisfactory pay trends for the employees concerned.

During the recession of the early 1990s the local authorities' resources were at a low ebb and this had an impact both on the availability of jobs and pay trends in the local government sector. In recent years the local authorities' economy has improved thanks to increased tax revenues and government grants, and some of this has been used to increase teachers' pay.

Since about 1995 there has been a favourable pay trend in all sectors following a period during which there was very little increase in real wages. The increase in pay throughout the economy was about 29 per cent between 1995 and 2001. Teachers' pay has kept pace with the general pay trend during this period, but, according to the teachers' unions, their pay can still not compete with that of the state and private sectors.

Pay trends (1991–2001)



Source: Swedish Ministry of Education and Science

Apart from this, pay trends for teachers have varied between different groups. For example, for a large number of upper secondary school teachers the increase in pay during the above period was 24 per cent. This may be compared with the pay trend for headmasters, pre-school teachers and junior level teachers, which increased by almost 32 per cent during the same period. For the sake of comparison it may be mentioned that pay for health care staff, nurses in particular, increased by 40 per cent between 1995 and 2001. One reason for this is the shortage of nurses in the metropolitan regions during the 1990s.

Chapter 6. Retaining teachers in schools

Every effort must be made to ensure that teachers who are recruited and employed remain and develop their skills in their chosen profession. Given the division of responsibilities in the Swedish school sector, the main responsibility for retaining and developing the skills of school staff rests with the local authorities. Together with the teachers' unions, the Government and SALA have initiated various programmes and development projects in order to support these efforts. Some of the larger-scale projects were mentioned in chapter 3 and 4. Their objective was to find new development and career opportunities for teachers, and several local development projects are still in progress in various local authorities.

The teachers and their unions consider improvements in the work environment and teachers' workloads the most important priority when it comes to retaining teachers. Increasing the resources available for school education is a key issue in this connection. The teachers' unions also mention the importance of improving teachers' opportunities for greater participation and responsibility, as well as greater freedom as regards internal school activities, for example initiating development projects and implementing educational ideas. Other priority issues mentioned by both the unions and the employers is the need for skills development and more career paths for teachers. Another matter that is considered very important is to ensure that good induction arrangements are provided for new teachers. The employers also mention the importance of recruiting capable headmasters and of leadership development, as well as the need for greater flexibility and more opportunities for teachers to do other work or combine teaching with work outside school during certain periods of their careers.

Both the employee and the employer representatives mention the recent collective agreements as a powerful tool when it comes to addressing problems and making improvements in the above areas.

Staff statistics

Teachers' retirement

According to the personnel statistics published by SALA, the percentage of teachers who leave the local government sector every year has varied very little since 1996 and is around 4.5 per cent. This figure is lower than average for local government employees. However, all teachers who terminate their employment with a local authority do not necessarily leave the teaching profession. Some take up work in independent schools, while others do other work for a while and then go back to teaching. 6–8 per cent of the teaching workforce terminate their employment on account of retirement, a change of career or other reasons. There is no appreciable difference between men and women in this respect nor between different parts of the country, although the figure is slightly higher in the metropolitan regions¹⁸.

According to surveys carried out by the Swedish Teachers' Union¹⁹, about 35,000 qualified teachers aged 20–55, who previously worked as teachers, no longer work in the public school system. Among the factors reported as most relevant to their decision to leave the teaching profession, men considered the relatively low pay as the most important factor while women cited the high level of stress.

Most teachers terminate their employment because they have reached retirement age, which, as for other professions, is 65. However, most teachers retire before this age, and this trend has become more marked compared with the late 1980s. At present, less than 40 per cent of 60-year-olds continue teaching until they are 64 and only 20 per cent of 64-year-olds are still teaching one year later. Research findings indicate that teachers, together with staff in the care services, are over-represented among those who do not expect to be able to work up to the age of 65²⁰.

Sick leave

Sick leave rates depend on various factors that have not yet been fully identified. One important factor is the fact that sickness benefit in Sweden is generous by international standards. The state of the economy also has some effect on the proportion of the workforce that reports sick. It is a well-established fact that sick leave rates are usually lower during a recession and higher during a boom, and this

¹⁸ SCB AM/PI 2002.

¹⁹ Lärarnas Riksförbund, 2002, report *Varför lämnar lärarna yrket?*.

²⁰ Arbetslivsinstitutet, 2001, *Handlingsplan för ökad hälsa i arbetslivet*.

is true of Sweden too. During the recession of the early 1990s, with rising unemployment and insecurity, many thought twice about staying at home from work. A reduction in sickness benefit also contributed to lowering sick leave rates during those years.

Parallel with the economic upturn in the latter half of the 1990s sick leave rates rose again. This trend was especially marked in the public sector, to which teachers belong. For example, in 2001 the number of hours of sick leave represented 7 per cent of normal working time in the public sector, compared with 4.5 per cent in the private sector. Regardless of the sector, women report sick more than men, which is the main reason for the higher sick leave rates in the local government sector, since women are in a majority in this sector²¹. However, it should be mentioned that the problem of women's sick leave is greatest in the care services, where the work is physically demanding²².

A study carried out in 160 local authorities in 2002 showed that sick leave rates vary between different categories of teachers and other staff. The highest rates were recorded for pre-school supervisors, pre-school teachers and childminders, whose sick leave rates were 47.5, 40.3 and 34.9 days a year, respectively, compared with the average for local government employees, which was 32.9 days a year. However, the average rates for upper secondary and compulsory school teachers and headmasters was lower than that for local government employees (22.7, 22.1 and 24.6 days, respectively)²³. This is not surprising considering the fact that the largest percentage of women in the education sector work in pre-schools.

Sick leave rates are also linked to age: they are 3–4 times higher among 60-year-olds than among teachers in the 25–35 age group. The workforce in the public sector is older than that in the private sector, which explains the higher average sick leave rates²⁴.

Leave of absence

Parallel with the rising sick leave rates, the proportion of teachers on indefinite term contracts who took leave of absence increased from 6.5 per cent in 1992 to 8.7 per cent in 2000. (These figures relate to teachers who were on full leave of absence for all or almost all the autumn term). The figures include teachers who were on sick

²¹ Svenska Kommunförbundet, 2002, *Kommunernas Ekonomiska läge*.

²² Arbetslivsinstitutet, 2001, *Handlingsplan för ökad hälsa i arbetslivet*.

²³ Svenska Kommunförbundet, 2002.

²⁴ Svenska Kommunförbundet, 2002, *Kommunernas Ekonomiska läge*.

leave during this period or transferred to non-teaching work. Female teachers take leave of absence more often than their male colleagues (9.7 per cent compared with 6 per cent for the latter). The increase is also greater among women. Lastly, leave of absence has increased most among teachers over the age of 54²⁵.

Work environment and workload

Teachers' work environment is a high priority issue for both employers and trade unions. It is also one of the areas that is identified in the current agreement between the parties as an area where improvement is necessary²⁶. It is worth mentioning that the National Institute for Working Life is studying teachers' work environment under a research programme entitled School Life.

Teachers' perception of their work environment

Several recent studies have been carried out by the teachers' unions on teachers' perception of their work situation. Overall, these studies show that many teachers enjoy their work, although they say they have a heavy workload.

Job satisfaction and shortcomings in the work environment

A study of teachers' work environment that was carried out by the National Union of Teachers in Sweden in 2002 showed that in many respects the work environment in schools is satisfactory²⁷. The respondents said that they enjoy their work and feel that they make a positive contribution to society. Only 2 per cent of the respondents professed distaste for their work. Respondents mentioned many advantages of the profession, such as the fact that teachers work on their own initiative and that the job offers a good deal of scope for making constructive use of their aptitudes. The teachers stated that their most satisfying task was working directly with pupils. They also said that the profession was consistent with values that they themselves considered important.

But the study also showed that teachers' work environment does present some problems. On the basis of the findings of the study a number of proposals for improvements in teachers' work environment and work situation were made.

²⁵ SCB AM/PI 2002.

²⁶ Lärarförbundet och Lärarnas Riksförbunds samverkansråd, 2002, *Uppföljning av ÖLA – djupstudie i 20 kommuner hösten 2002*.

²⁷ Lärarnas Riksförbund, 2002, Arbetsmiljöundersökning, *Hur har lärare och studievägledare det på jobbet? – och hur skulle de vilja ha det?*.

These include the need to make the most of teachers' professional skills, to find a more satisfactory solution to the problem of teacher substitutes within the framework of teachers' contractual working time. Other issues covered by the study were measures to prevent health problems among teachers, in particular their need of recuperation and the importance of adjusting the work situation better to the needs of older teachers.

Lack of resources

Schools must have sufficient resources in order to provide a satisfactory work environment. One study carried out by the Swedish Teachers' Union shows that teachers consider an increase in the resources available for schools the most important measure when it comes to retaining teachers²⁸. Many of the problems experienced by the Union's members as regards workloads and the work environment are attributable to the lack of resources. Teachers have repeatedly called for smaller groups of pupils, lower pupil-teacher ratios and increased resources for para-educational staff such as special needs teachers, welfare officers, school nurses and psychologists.

Monitoring and evaluation of the current agreement

The first study of the teachers unions' evaluation of the current agreement gives a many-faceted picture of teachers' perception of their work environment and workload and points out factors that may be crucial in this respect.

As regards the teachers' description of their work environment and the efforts made by their employer to improve the work environment, there is great variation, even in one and the same local authority area. The quality of the efforts to improve the work environment varies between the schools that were included in the study. In every local authority the investigators met teachers who were very satisfied with their work environment and with the measures being taken for their benefit. They also said that they met with respect in their professional role, that they had a say in their working conditions, that their efforts were appreciated and that they had the chance to develop in their profession. The study found examples of good work environments in all types of schools, where the teachers enjoy their work. According to the investigators, a key factor common to all the schools where the satisfied teachers worked was an effective school management team that operated on the principle of communicative leadership.

But the investigators also met the complete opposite, i.e. schools with a poor work environment, where the teachers were very frustrated about the poor conditions. Often the groups of pupils were too large, the problem of substitute teachers was

²⁸ Lärarförbundet, 2002, Medlemsdiskussionen 2001, Slutrapport 2002-03-02.

acute, the teachers had too much to do, management was not effective and there was little opportunity for improving the situation.

One common feature of the study's findings is that teachers, regardless of whether they considered the work environment good or bad, found that it was difficult to divide their time between all their different tasks so that they had sufficient time for what they regarded as their core activity, i.e. working with the pupils. The study shows that teachers have a heavy workload. The single problem that was most often mentioned spontaneously by the teachers who took part in the study was what they referred to as 'the substitute teacher hassle'. In essence, the problem is that substitutes are seldom called in on account of the cost and that the teachers who are available have to stand in for each other.

One explanation for the teachers' perception that they have a heavy workload may be the ambiguous situation that has arisen after the changeover to a new working time system. According to the study, the lack of a time schedule and clear rules about overtime means that many teachers are not sure exactly what hours they are expected to work. Most of them think they work 'too much', but this can generally not be proved. An increased teaching load also means that teachers are obliged to do much of their preparation and follow-up during their unregulated working time.

Among other aspects of the increased workload mentioned by teachers is an increase in administrative duties, such as the drafting of anti-bullying plans, quality statements, evaluations, documentation etc. These new duties are not set off by a reduction of their workload in any other area, and this means that their total workload has increased. Teachers also feel that the cutbacks that have hit school education have increased the work of dealing with pupils' social problems and made it more demanding.

Induction arrangements for new teachers

As regards the problem of retaining teachers in the profession, it seems appropriate to draw special attention to recent teacher graduates and newly engaged teachers. Newcomers sometimes find it difficult to find their feet in the profession, and this raises the question what sort of support and guidance should be provided for them.

According to the agreements between the employer's and employees' representatives, an induction programme is to be set up for a new teacher's first year, including workplace induction and professional induction. A mentor is to be appointed for each new teacher. It is essential in this connection that the mentor should be given proper training and that time should be allowed for both the new teacher and the mentor for conversations about teaching.

The National Union of Teachers in Sweden has followed up recently graduated teachers for several years in order to obtain a picture of how the labour market looks to them. The responses to their 2001 questionnaire survey suggest that new teachers are not entirely satisfied. For one thing, not all new teachers are assigned a mentor in accordance with the agreement. The survey showed that a mentor was assigned to about two-thirds of the compulsory school teachers and half the upper secondary school teachers who were employed for a probationary period. Furthermore, many of the new teachers did not feel that they had been given the help and support they needed when starting a new job. The survey also showed that the great majority feel they are under a great deal of pressure. Almost two-thirds of the new teachers said they could not perform their duties within the allotted working time. On average, 73.5 per cent of the respondents said that they intended to work as a teacher in future, while about 20 per cent said that they did not know. The respondents often said that the work situation was so demanding that they did not think they would be able to remain in the profession for long. Many comments had to do with the difficulty of limiting the number of hours that they devoted to their work every day. Several respondents also mentioned the lack of sufficient incentives to remain in the profession, in particular the lack of opportunities for professional development and an acceptable pay trend.

One measure that should make it easier for new teachers to acclimatize more quickly, and which would also increase their desire to remain in the profession, is a national project that was carried out by the National Union of Teachers in Sweden. The project was based on conversational guidance for new teachers. The idea was that the conversation groups would allow new teachers to exchange ideas and suggestions with other new teachers in the local authority area. A pilot project based on this model has been completed. The evaluation indicates that it was successful, since 89 per cent of those who took part in a conversation group said that their desire to remain in the teaching profession had increased as a result of the project.

Skills development

Need for skills development

Opportunities for skills development are another important factor when it comes to retaining qualified staff in schools. There are few hierarchic levels in school organization and consequently a lack of career paths. Becoming a headmaster has traditionally been the only career opportunity for teachers. Many teachers who are interested in educational development want to develop in their profession while continuing to work as teachers. Skills development serves several purposes, e.g. improving the skills of the staff in general, helping to create career posts and other development opportunities and contributing to staff supply.

It is essential for a school system that is constantly evolving that those who work in schools should develop their knowledge and skills in order to be able to meet new demands and contribute to development themselves. In a school system with a development-friendly climate teachers can develop new ideas, switch between different duties and take personal responsibility for teaching projects.

Under the Education Act, it is the local authorities that are responsible for providing skills development. In a central agreement between the parties they have agreed to set aside time for skills development during the teachers' regulated working time. Under the agreement, 104 hours (as an indicative value) are to be set aside for skills development per employee per school year. How this time is divided up and used is determined on the basis of the school's and the individual teachers' needs. The curriculum emphasizes the headmasters' responsibility for this, although individual teachers are personally responsible for their own skills development.

Organization of skills development

Skills development is defined in the agreement as measures aimed at developing teachers' ability to create favourable conditions for learning. On the basis of the needs of the school and the individual teacher, skills development may involve broadening and deepening subject knowledge, didactics and method development, teamwork development, research and development, curriculum work, the introduction of new technology and the development of social skills.

Apart from various types of regular in-service training, skills development also includes other elements, such as group discussions about teaching and pupils' learning, visits to colleagues' classes, educational evaluation, supervision, the

planning of teaching and many other things. These activities are carried on either in concentrated form during a whole day or a period of several weeks or continuously for a few hours or part of a day every week during the school year.

The type of skills development to be undertaken by teachers will depend primarily on the school's need for specific skills. The annual quality statement that is to be made by schools in connection with the continuous monitoring and evaluation of its plan of work provides important data for decisions about skills development. Obviously, the individual teacher's wishes and needs must be taken into account. Decisions about skills development are taken jointly by the employer and the employee. In many cases teachers are offered the chance to participate in credit courses within the framework of contract education provided by teacher education departments.

It should be mentioned that in Sweden, unlike other countries, no central directives are issued by the Government, the Ministry of Education and Science or the National Agency for Education stating that teachers must take specific training programmes. But the National Agency for Education does provide grants to local authorities and schools for skills development in national priority areas.

School leadership

A school's leadership is an important factor in developing and retaining capable teachers. The importance of the headmaster is also emphasized by the parties that are involved in school education and its development. This is reflected, *inter alia*, in the current agreement between the parties, which is largely based on a system of dialogue and individual agreements between the headmaster and individual teachers.

Headmasters' duties

As a result of the changes in the division of responsibilities between central and local government that was described in chapter 2, the previous detailed regulatory framework has been replaced by an objective-oriented system under which schools are responsible for their results. This in turn has radically changed the work situation and duties of headmasters, who are now in charge of both educational activities and administration. They are thus responsible both for operations and for personnel.

Another consequence of the new division of responsibilities is that headmasters are answerable to two authorities. They are employed by the local authority but are also required to perform certain statutory duties on behalf of central government, and their duties to both central and local government must be integrated into their functions.

A school's management team can consist of several people with different functions. In upper secondary schools and compulsory schools the title headmaster is used for the official who is responsible for the management of the school. Other staff members may help and support the headmaster, for example an assistant headmaster and financial and administrative staff. The headmaster's responsibility and duties are laid down in the Education Act and set forth in detail in the curricula. The headmaster's main responsibility is to direct and develop the school's activities.

Headmaster's responsibility for personnel management includes conducting pay and development talks, negotiating pay and drawing up skills development plans. The headmaster is also responsible for the work environment, which includes making sure that safety inspections are carried out and that systematic efforts are made to improve the work environment and also that gender equality plans and work environment plans are prepared.

Teachers' expectations

The headmaster thus has wide responsibility for the personnel and is required to have close contacts and regular staff conversations with a very large number of staff, who may even work in different places. In addition to being responsible for the school personnel, the task includes being a headmaster for a large number of pupils and having contact with their parents.

Studies show that the school staff also make great demands on school management. Comparative studies that have been made with reference values from the corporate sector show that, in the opinion of the staff, the demands made on headmasters are greater than those on business executives²⁹. The demands made by the staff are further evidence of the complexity of the headmaster's task. In other sectors it is often considered necessary to add layers of management, for example with respect to administration or human resources. A common model is to have an administrative director, a human resources director and a director for development. A single individual can seldom cover all these areas.

²⁹ Skolledaren, Trygghetsfonden, report 15/2001, *Från utbränd till uthållig eldsjäl*; see also for example Ekvall, 1996, *Navigatör och inspiratör: Om chefer, ledarskap och förändring*, Studentlitteratur och FA-rådet.

Qualifications

In view of the demands made on headmasters the question arises: what qualifications should they have in order to perform their duties? Attention has been drawn to the work situation and new duties of headmasters on several occasions in recent years. The issue was raised, for example, by a quality inspection carried out by the National Agency for Education in 1999 that focused on the management function of headmasters in a decentralized school organization³⁰. According to the inspection report, some headmasters are not sufficiently qualified to direct teaching activities, and measures need to be taken to address this situation at both the local and central government levels.

The question of the qualifications of school management for their tasks has also been raised by the teachers' and headmasters' organizations. One specific concern in this connection is how many staff members a headmaster can be responsible for if he or she is to conduct the annual staff and pay conversations. The workload of headmasters in this respect varies greatly between different schools. The study carried out by the National Agency for Education showed that in the schools that were inspected the headmasters were responsible for anything between 15 and 60 staff members. The inspectors concluded that the chances of effective personnel management are much smaller with a large staff, and this also makes it difficult for a headmaster to maintain relationships with the staff. The Swedish Association of School Principals and Education Directors recommends that headmasters should not be assigned responsibility for more than 25 staff members.

Headmaster training

An essential condition for effective leadership in schools is that headmasters have the necessary qualifications for the job. This matter has also been considered by the Government and by the employer and employee representatives.

The reform of the school education system and the wide-ranging responsibilities assigned to school managements make new demands on headmasters' competence. The job of headmaster requires broader skills than before and special training that takes into account the new range of responsibilities that are included in the new headmaster's role. New organizational structures in local authorities and the fact that an increasing number of headmasters do not have a traditional school background, but come from pre-schools etc., must also be taken into account in assessments of the need for basic and continuing training for headmasters.

³⁰ Nationella kvalitetsgranskningar, Skolverket, report 16, *Rektor som styrfunktion i decentraliserad skolorganisation*.

The inspection report published by the National Agency for Education indicated a number of areas where measures need to be taken and improvements made. They observed, among other things, that many headmasters lack basic teacher education. The need to develop the skills of headmasters was also mentioned in the Bill *A New System of Teacher Education*.

Under the Education Act, only persons who have acquired an understanding of the theory and practice of education through their own education and experience may be appointed as headmasters (chapter 2, section 2). Apart from this, there are no specific requirements as regard eligibility or specific education for appointees to headmaster posts. Nowadays, however, various opportunities for training and skills development are open to headmasters.

One of these is the headmaster training programme arranged by the National Agency for Education on behalf of the Government. This programme was set up to enable the Government to meet its responsibility for providing education of equal quality throughout the country, in which connection headmasters are to guarantee the equal quality, legal certainty and quality of the decentralized school system. The purpose of the training programme is to increase headmasters' understanding of their tasks and equip them better to discharge their statutory responsibilities in accordance with the curricula and other statutory provisions. The leadership exercised by headmasters is based on the curriculum. The programme is designed to provide headmasters with the knowledge they need to stimulate and motivate their staff. The programme also provides support for the task of overseeing monitoring and evaluation. It lasts between two and three years and is designed as a credit course. After completing the programme headmasters are expected to exercise leadership based on a democratic, learning and communicative approach.

There are also a variety of leadership training programmes in higher education for headmasters, teachers and other staff who wish to acquire management qualifications. The Government and SALA have launched various leadership development projects, which were described in chapter 3, in order to encourage and facilitate training for school managers.

Chapter 7. Future reforms and need for further development

Current and future reforms

Intensified quality improvement efforts

For 10 years now school education has been the responsibility of the local authorities. It was necessary and appropriate to transfer powers and responsibility from central government to those who are responsible for delivering education at the local level. It is therefore important to retain and improve the division of responsibilities between central and local government. A centralized performance-oriented education system sharpens the focus on attaining objectives and results.

Central government has a key role in guaranteeing that all children and adults receive an education of equally high quality. But it is the local authorities and school authorities which, together with teachers, headmasters and other school staff, are primarily responsible for achieving education objectives. Central government measures are strategically important in order to ensure that education of equally high quality is provided throughout the country and to support and further local development efforts. The decentralized and objective-oriented system requires extensive and careful national monitoring, evaluation, inspections and supervision, together with efforts to develop and support local development efforts.

Strategic development areas

The Government regards certain areas as strategically important for promoting development efforts and improving the quality of school education. The Government's development plan for quality management in pre-schools, schools and adult education (Comm. 2001/02:188) emphasizes three specific areas: a common basic education for all, flexibility and collaboration, and, which is of paramount importance in this connection, development of the teaching profession and

leadership development. Priority will be given to these three strategic areas and central government resources will be allocated to them during the years to come.

As regards the situation of teachers, the Government considers it necessary to further improve career opportunities in the teaching profession. Teachers must have opportunities for continuous skills development and for participating in research and development efforts with regard to school education. The Government intends to initiate an evaluation of the management structure of school education. The correlation between leadership, organization and the attainment of education objectives will be closely examined in this connection.

Other reforms

Preparations and discussions are now in progress in connection with the upcoming presentation of proposals for extensive reform of the school sector. The Education Act Commission has carried out a compulsory review of the Education Act and the Upper Secondary School Commission has presented proposals for the reorganization of upper secondary school education. The proposals submitted by these commissions on further deregulation of local authority schools and measures to improve the school work environment will directly affect the situation of teachers.

A new teacher education

The decentralization of school education and the performance-related system made it necessary to change the teacher education system. The compulsory general education component of the system aims to provide the same knowledge and skills for all teachers. The structure of the new system offers more choice and flexibility than the previous system, and the service placement component is now more important than before. There is a great need for education research, especially with respect to teaching and learning. The decision to reform the teacher education system and introduce a new organization for education research, and the substantial injection of resources, have greatly improved the prospects for education research and postgraduate studies in this area.

Future research needs

Statistics, information and policy analysis

A great deal of information, statistics and research data concerning the school system is available in Sweden. The National Agency for Education regularly publishes statistics that can be used by local authorities and other stakeholders for the purposes of comparisons with other local authorities. Various databases are also available. A number of analyses were presented in the 1990s, and there is a large volume of research, statistics and studies. However, better use needs to be made of the information that is available in the form of statistics, evaluations, studies, policy analyses and research than is the case today. Adaptation and interpretation may be necessary depending on what it is to be used for and by whom.

The capacity for assimilating and processing information has improved in the 1990s. There is a division for analysis and statistics at the Ministry of Education and Science that analyses education and research topics and processes relevant statistics. But there is no independent institute for policy analysis that processes information about the school system, makes it accessible to the public and carries out impact analyses. The National Agency for Education has a policy analysis unit, but it produces most of the information itself, and it is difficult to critically analyse information that you have produced yourself. SALA and the teachers' unions are also engaged in policy analysis, but these activities naturally focus on the organizations' interests. The Swedish Institute for Studies of Education and Research (SISTER) – which has links to higher education – is a body that might be called a policy institute. SISTER is financed by research funding bodies. There are also research groups at several universities and university colleges that carry out policy studies.

Using research data

The available research data and information are only used to a limited extent for the purposes of teacher education. There are two fundamental problems when it comes to the question of how teaching and learning research can benefit those involved in teacher education. One problem is that many of the staff engaged in teacher education do not hold PhDs. It is therefore necessary to gradually increase the proportion of staff with PhDs, since the lack of such teachers may be an obstacle to appropriate use of research data. Complaints about the lack of research are often heard in the debate on these matters, but the real problem may be the difficulty of assimilating research results. So the second problem has to do with the need to disseminate and improve information about research findings. This

could be achieved if researchers were given the opportunity and the time to write accessible summaries of their work and if both teaching staff and researchers had more opportunity within the framework of teacher education programmes to present research results.

Important research issues

The Government Bill *New Teacher Education System* identified three cornerstones of teacher education: in-depth knowledge of the chosen subjects, intensified research on learning and a thorough grounding in education science for all prospective teachers.

According to the 2003 appropriation instrument for the new Agency for School Improvement, the Agency's task is to describe how knowledge and research findings are assimilated and disseminated in its area of responsibility. The Agency also has the task of preparing knowledge and research strategies to provide input for the Government's coming Research Policy Bill.

The National Agency for Education, The Swedish Association of Local Authorities and the Teachers' Unions mention several areas as especially important as regards future research on school education and the work of teachers. All the organizations concerned want the research to focus more on practical teaching situations. The connection between research and the work of teachers is, moreover, mentioned in the current agreement between the employer and employee representatives. Traditionally, much of the research on school education has focused on providing decision guidance data for the purposes of various reforms. Research needs to be refocused in view of the changes in school education, as a result of which teachers now have greater responsibility for school education and its development.

The National Agency for Education emphasizes the importance of disseminating research findings in pre-schools and schools and of encouraging teachers themselves to do research on matters relating to their own work. One priority issue, according to the Agency, is to find out why the status of the profession has deteriorated and why it has become a typical female profession. Research may also help to define the teaching profession more clearly. According to the Agency, it is important in this connection to find out what is expected of teachers and what criteria should be used to evaluate their performance.

The Swedish Association of Local Authorities would like to see a fully developed dialogue between the research community and the schools themselves. The Association considers it important to develop methods for researchers to communicate their results and for schools to assimilate these results and use them in practice.

The Swedish Teachers' Union emphasizes that today, now that teachers have more responsibility for school activities and development, it may be necessary to change the focus of research. The new, broader teacher's mandate makes many teachers uncertain about their professional role. Teachers therefore need to know more about what it is that makes a teacher a good teacher. The Union would like to see more research on what is at the core of the teaching profession, i.e. understanding why and how learning takes place. They also think there is a need for more subject-related didactics. It is also important to set up meeting-places where researchers and practitioners can pursue a dialogue on practice-related research.

The National Union of Teachers in Sweden says that there will be a need in future for research on efficient ways of using teacher resources. There is a need to investigate the areas in which a teacher's skills benefit pupils most, in other words which tasks should be performed by teachers and which tasks could be performed equally well or better by others.

Here are some examples of other subjects for research that are mentioned by the various stakeholders:

What is it that triggers learning for different people in different situations?

What are the qualities that characterize effective teachers and how are these qualities acquired?

What are the distinguishing marks of 'good teachers'?

What different kinds of teaching styles are there?

Conclusions

Conclusions may be drawn about some other issues relating to the attraction, recruitment, employment and retention of qualified teachers in the Swedish school system. By and large, these have to do with the work situation of teachers and their opportunities for professional development.

Teachers are a school's most important asset, and the teaching profession must therefore be an attractive profession that offers opportunities for development. Capable and well-educated teachers create a favourable climate for pupils' learning. The work and professional role of teachers has changed radically, and the profession is now both more important and more demanding. At the same time, the present school system offers teachers more opportunity for development and for using their professional expertise.

Experienced and skilled teachers should be identified so that they can act as mentors for younger teachers and other teachers who may need support. Teachers must be given the chance to improve their professional skills and be appointed to 'higher' posts and also to undertake other tasks within the framework of their profession. Teachers also need to derive inspiration from other sectors, and collaboration with the business and local community should be intensified. Qualified teachers should be encouraged to work in other professions and use their skills in sectors other than education.

The media often give a one-sided picture of schools and the work done by teachers. The majority of teachers do an excellent job, and teachers should be encouraged to take part in the public debate and give their own views about schools.

The role of teamwork in schools should be recognized, and attention should be drawn to the interaction between teachers and other school staff, such as welfare officers and psychologists. There is a potential dynamism in the different kinds of input contributed by individuals with different skills.

The question of teachers' pay levels is highly relevant to the status of the teaching profession in the context of recruitment. Another central theme in discussions about recruitment is teachers' work environment, which in itself involves many different aspects. One important aspect is the need to have a say in the organization of one's own work.

Headmasters have overall responsibility for teaching activities in schools. They are thus also responsible for their school's attainment of its objectives and for the quality and equal value of the education provided. They must have the time to discharge their responsibility for educational development. Providing feedback to the teachers about their work is also an important task for headmasters, since they are responsible for day-to-day activities and for improving the school's operations in close cooperation with the staff.

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