

**IMPACT OF THE FREE BASIC EDUCATION POLICY ON
ENROLMENT AND COMPLETION RATES OF PUPILS FROM
LOW-INCOME HOUSEHOLDS IN SELECTED BASIC SCHOOLS
OF LUSAKA, ZAMBIA.**

BY

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A Dissertation submitted to the University of Zambia in partial fulfilment of
the requirements for the award of the degree of Master of Education in
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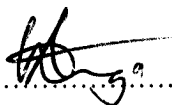
LUSAKA

2010

AUTHOR'S DECLARATION

I, **Anne Mambwe Mulenga** do hereby declare that this dissertation is my own original work and that it has not previously been submitted for a degree at this or any other university.

SIGNED:



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1st July 2010

APPROVAL

This dissertation of Anne Mambwe Mulenga is approved as a partial fulfillment of the requirements for the award of the degree of Master of Education in Sociology of Education at the University of Zambia.

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DEDICATION

To my beloved husband Tommie Mambo Njobvu, whose support, understanding and patience I will always cherish. To my lovely children Ely'umusa, Yanga and Ngiyabonga.

And to my wonderful parents Simon and Godfrida Mulenga for all the sacrifices they made for me.

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Above all, to God be all the glory and honour.

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List of Acronyms

CCF.....	Children Christian Fund
DFID.....	Department for International Development
EFA.....	Education For All
FBEP.....	Free Basic Education Policy
GRZ.....	Government of the Republic of Zambia
JCTR.....	Jesuit Centre for Theological Reflection
MCTI.....	Ministry of Commerce, Trade and Industry
MDGs.....	Millennium Development Goals
MOE.....	Ministry of Education
NGO.....	Non Government Organization
PTA.....	Parent Teacher Association
SPSS.....	Statistical Package for Social Sciences
UN.....	United Nations
UNESCO.....	United Nations Educational, Scientific and Cultural Organization
UNICEF.....	United Nations Children’s Fund
ZNEC.....	Zambia National Education Coalition

ABSTRACT

This study set out to examine the impact of the Free Basic Education Policy (FBEP) on the enrolment and completion rates of pupils from low-income households in selected Basic Schools of Lusaka, Zambia.

The study used a survey research design. The study sample comprised 100 Grade 7 pupils, 5 head teachers and 40 parents. Purposive Sampling was used to select 40 parents/guardians, 5 basic schools in Lusaka from where 100 pupils were selected through Simple Random Sampling. Data were collected using questionnaires, semi-structured interviews and documentary analysis. Quantitative data were analyzed using the Statistical Package for Social Sciences (SPSS) while qualitative data were categorized and analyzed into themes and sub-themes.

The findings of the study revealed that:

- There was remarkable awareness about the FBEP among pupils and parents/guardians from low-income households.
- Families from low-income households were of the view that the impact of the FBEP on enhancing access to education among the poor members of society was insignificant because education was not really free due to the existence of education costs which were still too high for them.
- Most of the government basic schools still demanded that a pupil be in full uniform (including school shoes) when enrolling into Grade 1 as well as in the course of basic education.
- Some schools continued to administer modest user fees in form of project or maintenance fees.
- Learning materials like exercise books provided to the pupils by the government were quite insufficient; hence households still had to meet some costs.

- There was some increase in pupil enrolment and a reasonable increase in completion rates among children from low-income households; however, there were still a significant proportion of children who were unable to complete basic education.

Following the findings of the study the recommendations therefore, are as follows:

- a) The Ministry of Education needs to clarify and monitor the implementation of the FBEP guideline concerning school uniform so that no eligible child should be barred from school for not having a school uniform.
- b) The government should consider providing enough exercise books for every pupil so that parents would not have to face the costs of buying books.
- c) In order to promote enrolment and completion rates of children from low-income households, the Ministry of Education should increase the number of bursaries to the children.

CHAPTER ONE

INTRODUCTION

Background to the study

At independence in 1964, education in Zambia was made free and the government embarked on the development of the educational system through a number of policy reforms. During this era Zambia was a relatively rich country and was able to sustain a system of free education because of economic prosperity due to the favourable prices of copper on the international market. However, the system could not be sustained as a result of deterioration of the country's economy following a world economic crisis of the 1970s when there was a sharp drop in copper prices on the international market (IOB, 2008). The government, therefore, came up with a Cost Sharing policy that required parents and other stakeholders to take a share in the cost of education hence User Fees and Parent-Teacher Associations (PTA) fees were introduced in 1976 (MOE Boards, 2005).

The introduction of user fees and PTA fees, including the requirement for exercise books and uniform became a great obstacle to accessing basic education by children from poor families. The situation was that, a large number of children would be enrolled in basic education, but as they ascended the education ladder, a number of them left school prematurely due to their poor socio-economic background. For example, of all the children who entered Grade 1 in 1988, only 79% reached Grade 7 in 1994 (MOE 1996). In 1991 the proportion of children who dropped out of school in rural areas ranged from

5% in Grade 1 to 11% in Grade 6, while in 1996 the drop-out rate ranged from 4% in Grade 1 to 16% in Grade 6 (MoE, 2000). By 1999, 37% of the urban and 60% of the rural area children of school-going age were not enrolled (IOB, 2008).

The government's concern for the number of children who failed to enrol or to continue with basic education due to poverty led to the pronouncement of the Free Basic Education Policy (FBEP) for Grades 1- 7 by the Republican President of Zambia in 2002, (State House Website: Education Homepage www.statehouse.gov.zm 28 March2006).

The policy included abolition of user fees, which were regarded as a barrier to accessing basic education by the vulnerable children, particularly orphans and those from rural areas and poor families. School uniforms were made optional and school fees were abolished for children attending lower and middle basic school grades (Grade 1 to Grade 7). This meant that no pupil could be turned away from a government basic school on account of not being able to pay school fees or not having school uniform (MOE, 2005).

Through this policy, the government intended to create more education opportunities for children from poor families. It is worth to note here that about 68% of Zambia's population are classified as poor, living below the poverty datum line of US\$0.93 a day (IOB, 2008).

According to State House Website (Education Homepage www.statehouse.gov.zm 28 March2006), the introduction of free basic education was in line with the United Nations (UN) Convention on the Rights of the Child (1989: Article 28) which stipulates that it is

national governments which are responsible, on the basis of equal opportunity, for making primary education compulsory and free for every child (DFID, 2001). This could be seen as a step towards reaching the United Nations' Millennium Development Goal of Universal Primary education by the year 2015.

Statement of the Problem

The government introduced the Free Basic Education Policy in 2002 in order to increase opportunities for poor members of society to access basic education (State House website, Education Homepage www.statehouse.gov.zm 28 March 2006). However, the impact of free basic education on pupil enrolment and completion rates is not known. It is not certain that after the abolishment of school fees and uniform, more children from low-income families were actually able to enrol and to complete basic education. Therefore, this study was designed to determine whether or not the Free Basic Education Policy has succeeded in reaching the poor children by improving their access to basic education.

Purpose of Study

The purpose of this study was to establish the impact of the Free Education Policy on the enrolment and completion rates of pupils from poor socio-economic families in selected basic schools of Lusaka District.

Objectives of the Study

The objectives of this study were:

1. To find out whether or not people of low-income households were aware of the Free Basic Education Policy.
2. To find out the views of the respondents about the impact of the free education policy on access to basic education among children from low-income households.
3. To compare the enrolment and completion rates of children from low-income households before and after introduction of the Free Education Policy.

Research Questions

The study attempted to find answers to the following research questions:

1. Are people from low-income households aware of the Free Basic Education Policy?
2. What are the views of the respondents on the impact of the Free Basic Education Policy on access to basic education among children from low-income households?
3. Is there any difference in enrolment and completion rates of children from low-income households before and after introduction of the Free Education Policy?

Significance of the Study

The Zambian government's concern in the provision of education arises from three main principles of the Ministry of Education; to protect the rights of individuals; to promote the social and economic well being of all citizens, and to achieve a good quality of life for every citizen (MOE, 1996). At the time when basic education is considered a basic right for children in every country, the study that tries to evaluate the policy of free education is of great interest to policy makers and students of education. The findings derived from this study may guide interested stakeholders to formulating appropriate

interventions in order to enhance the education of the marginalized children. In addition, the findings of the study may provide information for evaluating and monitoring of the implementation of free basic education policy by the Ministry of Education.

Operational Definition of Terms

Low-income households refer to poor members of society who could be living below the poverty datum line of US\$0.93 a day. These may include mainly the domestic workers, security guards, the unemployed (not in any form of employment due to old age or illness), the self-employed such as carpenters, plumbers, tailors and small scale farmers. In the study, low-income households referred to; a) people who could be in formal employment but with limited or low wages, such as housemaids and security guards, b) those who were self or informally employed in low-income business like selling vegetables, charcoal or fritters, c) those who were neither formally nor informally employed as a result of old age or serious illness.

Completion Rate is the proportion of pupils who actually complete the education cycle. In the context of this study, it refers to the completion of the seven years of the basic education cycle, from Grade 1 to 7.

Basic Education in the Zambian school system is defined as the first unit of formal education. It is a nine-year education, which consists of Grades 1 to 9 and is intended for the age group of between 7 and 15 years. Basic education is divided in stages as follows; Grades 1 to 4 as Lower basic; Grades 5 to 7 Middle basic and Grades 8 to 9 as Upper

basic. In this study the concern is with the lower and middle basic education from Grade 1 to 7.

Conceptual Framework

The study was grounded on the conceptual framework from the Social Stratification Theory. The theory of social stratification argues that society is divided in different layers or strata according to people's attainment of wealth, education, power and prestige. Parelius and Parelius (1978), state that Social Stratification is a situation that is concerned with variables such as wealth, power, education and prestige that are unequally distributed among members of society.

They argue that socio-economic status is positively correlated with both educational attainment and achievement; the higher a student's socio-economic status, the greater his/her educational accomplishment is likely to be. In the Zambian context, people of the upper class such as doctors, lawyers and engineers tend to have more power and access to prestige than those from the lower class like untrained workers and the unemployed. Using their position and influence in society, the members of the upper strata easily acquire for their children good education and later on good jobs. Hence, Parelius and Parelius (1978) postulate that members of the upper strata owe their educational accomplishment to the advantages provided by their social background.

Therefore, basing on this theory, one would expect the distribution of education opportunities to vary with the layer a person belongs to; people from the upper layer to

have more opportunities to education than those from the lower layer. This theory is relevant to this study in that it brings forth an understanding of the relationship between socio-economic status of a household and attainment of basic education in Zambia.

In this study, however, the concern was not with the comparison between the upper class and the lower class as regards their access to education, but whether the policy's intervention had increased the chances of the poor members of society to access education. The assumption has been made that children of poor members of society have low chances of accessing and completing the seven (7) years of basic education.

CHAPTER TWO

LITERATURE REVIEW

Introduction

This chapter reviews literature on access to basic education. It will discuss situations from different countries as well as the Zambian situation to show the impact of poverty on access to basic education; the introduction of free basic education; and the impact of free education on enrolment and completion rates among children from low socio-economic households.

The Impact of Poverty on Access to Basic Education: A General Perspective

Participants at the World Conference on Education for All in Jomtien, 1990, acknowledged that despite notable efforts by countries around the world to ensure the right to education for all, more than 100 million children in developing countries, out of whom 60 million were girls, had no access to primary education due to factors such as poverty, gender discrimination and diseases (UNESCO, 2009).

One of the major causes of low demand for basic education as reported in some literature is the cost of education. Studies such as Lockheed & Verspoor (1992); DFID (2001) and OXFAM (2007) observed that inadequate financial resources were a significant constraint to access basic education. One peasant farmer in Tanzania had this to say:

'How can I afford to send my children to school when I can't afford to feed and clothe them? I know how important education is. But the school fees and books are beyond my means,' (OXFAM, 2007).

From such sentiments, one would deduce that it may not necessarily be due to lack of awareness about the importance of education that poor families fail to take their children to school, rather the inadequacy of income and resources in a household which would be required to meet the educational needs.

Graham-Brown (1996) observed that during the 1990s, in many parts of Africa, Latin America and Asia, the severe economic crisis saw a reduction in the number of children enrolling in school. During the period between mid 1980s and 2000, most developing countries experienced a decline in access to education due to poverty (Brown, 1996 and Chimombo, 2005). For example, in 1990 only about three quarters of children in some Sub-Saharan African countries were attending school, while about 130 million had either never attended school or had dropped out before completing the primary cycle (Colclough and Lewin, 1993).

According to Colclough and Lewin (1993), the major cause of low demand for basic education was poverty in the sense that even where educational returns were high; the direct and indirect costs of school attendance were often too great for poor families to afford. Direct costs include school fees, examination fees, buying of learning materials such as books, transportation and lunches. Indirect or opportunity costs refer to the income or other economic contributions that a household sacrifices in order to keep a child in school.

Direct costs usually make it difficult for the poor families to send their children to school, and if they are sent, to complete even the basic education cycle. Chimombo (2005) argues that poor children are normally malnourished which arguably lowers their academic achievement levels. Where poor children do manage to enrol in school, poor nutrition and health can hinder their full participation and learning (DFID, 2001). Petruskis and Nkunika (2006) note that for poor families who can hardly afford the necessary meals, abolishment of school fees may not suffice because they may not send their children to school on an empty stomach.

As regards indirect costs, for some households, this entails that the family foregoes the children's contribution towards income generating activities such as farming or selling merchandise, (Chimombo, 2005). Chimombo (2005) also points out that even when schools are accessible and affordable, families have to see a net advantage to themselves and to their children from forgoing children's full-time participation in domestic and economic activities.

Colclough and Lewin (1993) observed that households with limited income in Africa tended to withdraw their children from school not only because of parents' inability to meet direct school costs, but also due to an increased dependence upon the income that their children could earn. The poor members of society face several challenges in educating their children. One of the challenges is their perception of the benefits of education. In their need for financial resources, poor households are hardly able to understand the future value of education, therefore would prefer to employ their children

in the home, on the farm or in income-generating activities to obtain income to supplement family income rather than attending school (MOE, 1996).

Subulwa (2007) argues that the willingness of families to invest in education is usually determined by the benefits or returns they expect from the investment. He further observes that social returns to investment in education are higher at primary or basic level in developing countries than it is in developed countries.

For the poorest households, education may be a lesser day-to-day priority than basic survival. In cases of extreme poverty, children may contribute up to 40% of family income. Girls in particular contribute to unpaid labour, mainly in domestic and agricultural activities (DFID, 2001).

Moreover, the issue of orphans also goes with a lot of challenges in relation to indirect costs. HIV/AIDS is having a devastating impact on poor people. For example, there are situations where families have been struck by poverty as a result of the illness or death of bread winners. With the loss of either parents or breadwinners, children have to take the responsibility of running homes (JCTR and Oxfam Zambia, 2001). Nakachinda et al. (2001) also observe that when a child becomes an orphan, he is unlikely to continue with school in cases where the family that takes him in may already be struggling to pay for its own children and may not afford to pay for any more.

The Impact of Poverty on Access to Basic Education: the Zambian Situation

The IOB Report (2008) indicated a relationship between wealth and school attendance. For instance, during the 2000/2001 period, school attendance was highly related to wealth in that the wealthiest households had much higher attendance rates than the poorest households.

The impact of poverty in Zambia was greatly felt in 1990s. According to the Priority Survey of 1993, only 18% of households in Zambia had an income which was sufficient to provide for nutritional and other basic requirements, almost three-quarters of the households were extremely poor. The worst affected socio-economic group was that of small scale farmers; 18% of their households were rated as extremely poor (MOE, 1996).

During the 1990s, as a result of the decline in the Zambian economy and debt burden, the government was unable to provide adequate support to the education sector; hence schools were forced to raise their fees. This led to many pupils leaving school because their parents were no longer able to afford these fees (Mwansa et al.; 2004 in IOB, 2008). In 2001, only 152,032 children were enrolled in school out of 342,305 (MOE, 2003). Lungwangwa in Maliyamkono and Ogbu (1999) contends that in 1991, 498,000 school age children were not in school compared to 1,494,817 who were in school. Lungwangwa further points out that by 1996, 650,000 children were not in school compared to 1,506,650 who was in school. In 1990, more than 650,000 eligible children (7-13 year olds) had no access to education (MOE, 1996).

Many children were not able to go to school because of the high cost of learning. The low socio-economic groups tended to have limited access to social services such as information, health, sanitation and education. A study by OXFAM-Zambia and JCTR (2001) revealed that there was a strong correlation between the household economy and the ability to contribute towards basic education and that this had a bearing on an individual's opportunity to educational achievement.

Himpyali (1993) conducted a study pertaining to the effects of pupils' socio-economic background on education achievement. The study was on the relationship between education fees and the dropout rate in some boarding secondary schools in the Southern Province. He found out that among other factors, financial constraints ranked among the major factors leading to the majority of dropouts. The study also revealed that more pupils withdrew from government schools because of inability to pay fees. Meanwhile, grant-aided schools had fewer dropouts because there was more effective processing of bursary sponsorships than in government schools and that grant-aided school authorities sought assistance in monetary terms and in kind for needy pupils from business organizations and the church.

The study by Himpyali (1993) concentrated on establishing the relationship between education fees and the dropout rates particularly in secondary schools. The findings of his study showed that low socio-economic background of pupils may hinder education achievement, no wonder the need to assist the needy pupils. However, Himpyali's study

left a gap in the sense that it only gave information about secondary schools leaving out basic schools.

Provision of Free Basic Education in Other Countries

During the World Conference on Education for All (1990), participants recognized that provision of education at that time was seriously deficient and that it had to be made more relevant and qualitatively improved, as well as universally available. Therefore a declaration was made that basic education should be provided to all children, that educational disparities such as poverty and gender discrimination should be removed. The less privileged groups such as the poor, street and working children should not suffer any discrimination in access to educational opportunities (UNESCO, Education for All, 2009).

In order to tackle the problem of worldwide decline in access to education, one common strategy and policy intervention undertaken by various countries was that of making primary or basic education free. Governments of various nations took up the responsibility of providing free basic education for every citizen. For instance, a number of European countries such as Norway, France, Sweden and Finland, which recognized that education were a fundamental human right provided free education (Norwegian Ministry of Education Research, 2005). For Finland, the main objective of the education policy was to provide all citizens with equal opportunities to receive education irrespective of age, economic situation or gender, (UNESCO Reports, 2009).

For many African countries, at attainment of independence, access to education was regarded as part of a process of liberation. For governments, the promise of “education for all” was both an act of faith in the future of the country and an important way of increasing their political legitimacy in the eyes of their people (Brown 1996). Therefore, governments introduced policies that concentrated on increasing enrolment and retention of pupils in school. Some countries like Malawi, Ghana, Uganda, Kenya, and Zambia, in acknowledgement of the United Nations Millennium Development Goals, eventually introduced free and compulsory basic education.

In Ghana, the removal of fees was part of the country’s ongoing effort to boost enrolment and make education accessible to a larger section of the population, in accordance with the United Nations Millennium Development Goals for education (IRIN News, 2009). As for Malawi, the goal of providing universal access to primary education was born from the Second Education Development Plan (1985-1995). The aims of the plan were to equalize educational opportunities, promote efficiency in the education system, improve physical and human resources and to encourage judicious use of limited resources. In addition, the Ministry of Education Policy Investment Framework (1995-2005) stated that the government of Malawi shall develop and provide basic education for every child in effective partnership with relevant stakeholders. To achieve this, some of the objectives put in place were that the government of Malawi would offer free primary school education to all school age children, target a net enrolment ratio of 90% and make wearing of school uniform a non-compulsory condition for school attendance (UNESCO, country reports, 2009).

Provision of Free Education in Zambia

In the 1996 National Policy on Education (MOE, 1996), the Ministry of Education affirmed that it would take positive action to ensure that the education system caters for the poor and vulnerable. To this effect, some of the strategies put up were that the Ministry would ensure that measures aimed at sharing the educational cost with communities take account of families' capacity to pay, and that no child would be excluded from school or from any school activity on grounds of failure to pay or being unable to afford the required learning materials, or school uniform.

One of the principles for the development of education in Zambia is for the Government to enhance equity by eliminating sources of educational disadvantage such as gender, physical, social or economic factors (MOE, 1996). The introduction of free basic education was intended to benefit the poor members of society by eliminating poverty (State House website, 2006). Therefore, making education free for the Lower and Middle basic education was meant to be an appropriate solution to the problem of decreased access to basic education.

The Zambian government's decision to provide free basic education arose from three main principles of the Ministry of Education namely, to protect the rights of individuals, to promote the social and economic well being of all citizens, and to achieve a good quality of life for every citizen (MOE, 1996).

The mid- nineties saw a great decline in the enrolments of pupils in grades 1-7, with the scale tilted in favour of boys. It was against the background of low demand for basic

- (v) Teachers should note that remedial teaching is part of their professional responsibility and should therefore, not charge children for extra tuition undertaken within the schools. (MOE, Circular No.3, 2002)

The Impact of Free Basic Education on Enrolment in Basic Education among Children from Low Socio-Economic Households

A study by Manzo (2006) revealed that the introduction of free basic education in some Sub-Saharan African countries led to an increase in enrolments such that classrooms in government primary schools were filled beyond normal capacity. In some countries, including Malawi and Uganda, the introduction of Free Basic Education has had an enormous effect. In Uganda, enrolments increased from 2.6 million to 5.3 million pupils in 1997 (IOB, 2008). In Malawi, primary school enrolments increased from 1.6 million in 1993 to over 3 million after the introduction of free primary education (Mwansa et al., 2004 in IOB, 2008). Numerous pupils who had left school because their parents could no longer afford the school fees, returned after the implementation of FBE.

In Zambia, statistics from the Ministry of Education indicate that in 2005, a total of 444,300 pupils enrolled in Grade 1 out of which 225,231 were females and 219,069 were males. It was reported that there was an increase of 16.7% in enrolment from 2004 to 2005 (MOE, 2006). In addition, a publication by the Ministry of Commerce, Trade and Industry (MCTI, 2007), recorded a rise in gross enrolment ratio for basic education from 75.1% in 2000 to 104.6% in 2005. In 2001, the gross primary enrolment rate was 78.7 percent, and the net primary enrolment rate was 66.0 percent.

The FBE policy is said to have removed the burden of lower and middle basic education costs from parents’ shoulders. According to Mwansa et al. (2004), several parents revealed that the removal of school fees enabled them to use the money for food, clothing and health care. Mwansa et al also add that about 150,000 pupils who had dropped out of school because their parents could no longer afford the fees were able to return to school. In 1999, 1.6 million children were enrolled in primary education, the figure increased to 2.7 million by 2007 (IOB, 2008). However, the IOB report (2008) argues that the growth in enrolment could not be attributed exclusively to the effectiveness of the FBE policy, but also to the growth of the number of community schools.

A review of some statistics was relevant to compare enrolment rates before and after the pronouncement of the FBE policy in Zambia. Table 1 below shows Net Enrolment Rates between 2000 and 2005.

Table 1: Net Enrolment Rates from 2000 to 2005

Sex	Year					
	2000	2001	2002	2003	2004	2005
Female	40.0%	44.0%	42.2%	38.4%	43.3%	53.1%
Male	39.7%	41.2%	40.0%	37.0%	41.0%	49.3%

Source: MoE EMIS Planning Unit (2005)

Studies conducted by Matabishi (2004) and Kaulule (2006) contended that the Free Basic Education Policy had a positive effect on pupil enrolment in that there was an increase in

enrolment. Matabishi (2004) recorded that in some schools in Petauke, Eastern Province, enrolments rose by 39.1%, from 1,200 in 2003 to 1,670 in 2004. On the contrary, the findings on an assessment on the impact of the FBE by Mwansa et al. (2004) revealed the following:

The enrolment rates increased marginally after the introduction of FBEP.

i) The enrolments declined in 2003. This decline occurred only in urban areas, which is strange considering that policies of any kind often reach urban areas more adequately than rural areas. It would also appear from this finding that the cost factor was not really the only major barrier to access.

ii) Though the guidelines from the Ministry of Education did not impose any limits on enrolments, the Mwansa et al, study (2004) found that one third of the applicants were turned away, suggesting that other considerations were equally important in determining access. Another plausible explanation for this outcome could be that head teachers of schools misinterpreted the policy. It was also found that the ratio of girls turned away was slightly higher than that of boys.

The impact of FBEP was reported to be significant on pupils who had dropped out of school due to their failure to meet the fees charged before. These were reported to have returned to school in numbers following the implementation of the policy.

- (iv) The incidence of pupils dropping out of school continued after FBEP. The major reason for dropping out of school among both rural girls and boys was said to be early marriages and pregnancies for girls, and lack of parental encouragement and support. In the case of urban schools, the predominant reason was orphan hood followed closely by lack of parental encouragement and early marriages.
- (v) The impact of FBE on community schools was surprisingly unexpected. More pupils moved from government to community schools than the other way round. Yet it had been widely anticipated that community schools would be affected by the policy as the removal of fees was expected to encourage pupils in community schools to return to government schools. Pupils moved to community schools because of long distances to school, transfer of parents/guardians, lack of parental support, and strikes in GRZ schools, and teachers being more committed in community schools.
- (vi) With regard to the impact on girls, who fell under the category of special groups, the study found that boys had better chances of enrolment than girls even though more girls had officially indicated intention to be considered for enrolment into basic school. Based on responses from Head Teachers, this study found that a boy had almost 69% chance of getting enrolled in 2003 compared to 66% for a girl. Comparison of opportunities in rural and urban areas revealed that rural girls have better access than their urban counterparts. These results on girls raise concerns when seen through the lenses of the Millennium Development Goal to eliminate gender disparity in primary education preferably by 2005, and at all levels by 2015. Unless promptly addressed by Ministry of Education, the

situation on the ground as revealed by their study was that Zambia was far from meeting the set targets and the internationally set targets such as the Millennium Development Goals and Education for All Goals.

Mwansa et al. (2004) found that despite these guidelines, uniforms were still compulsory in some schools, indicating a misinterpretation of the provision by Head Teachers. The misinterpretation could have been caused by the ambiguity in the guidelines that allowed schools to continue with the uniform requirement on condition that the acquisition of uniforms was not commercialized into some fund-raising venture. Surprisingly, the study by Mwansa et al., (2004) found that the misinterpretation of the uniform policy was greatest in urban schools.

According to OXFAM (2007), with insufficient availability of public finance, the cost of education was being transferred to poor families as part of a creeping privatisation of education financing. Households faced a bewildering array of education charges, from direct school costs to indirect costs for books, pencils, transport, food and uniforms. Parents consistently cited cost as the major factor in deciding to keep children out of school (OXFAM, 2007).

OXFAM (2007) further brings out some areas indicating that the FBE had not fully realized substantial impact on poor families. Education has become a privilege, ordinary people simply cannot afford it. Even where education is normally free, some direct costs are often passed on in the form of charges for exercise books, uniforms, and transport. These direct costs can reach up to 20% of a family's income, making education

unaffordable to some households (DFID, 2001). Parents were forced by education charges to make impossible choices, such as whether to buy basic needs in the home such as food and medicine or buy school requirements in order to keep their children in school. According to OXFAM (2007) success in achieving universal basic education depends on education becoming affordable to the poor. But abolishing user fees requires a major increase in financing as well as coherent strategies to improve the quality of education and manage the surge in demand that will inevitably follow.

The Impact of the Free Basic Education Policy (FBEP) on Pupil Completion Rates in Other Countries

In Sub-Saharan Africa, access to basic education is reported to be 100%, but the problem still remains with those accessing it reaching the last grade (UNESCO, 2006). Completion rates of the full primary cycle in most countries in sub-Saharan Africa are between 60 and 70% (DFID, 2001). In addition, a report from the World Bank on Education for All indicates that one third of all children enrolled fail to complete their education through grade 7 in many developing countries, less than 60 percent of primary school pupils who enrol in first grade reach the last grade of schooling (World Bank, 2007). UNESCO (2005) recorded that despite an increase in the number of children going to school today, many are not able to go beyond Grade 5 of primary school.

The World Bank (2007) recorded that poverty was one of the major contributing factors why about 77 million children in developing countries are out of school today. About 70% of the pupils leave school because of economic reasons, marriage (girls), loss of

parents, and pregnancy. This information indicated that socio-economic characteristics were highly relevant.

Lockheed et al. (1991) argued that broadening access to education is not just a matter of increasing the number of children getting into school, but also according them an opportunity to learn and complete their education. A report by UNESCO (2006) also postulates that to educate a nation takes much more than simply increasing school enrolment figures. Mumba (2002) also noted that universal participation implies that all children who start basic education should continue to the end of the cycle

The right to education as suggested by Nakachinda et al., (2001) entails enabling every child to enrol in school, learn while in school, proceed normally from one grade to another and complete at least the basic programme. Therefore, the task of providing education is not only to have more children enrolled in school, but also to keep them in school and to ensure that they complete the 7-year primary cycle.

The Impact of the Free Basic Education Policy (FBEP) on Pupil Completion Rates in Zambia

Completion rates are said to have increased over the period since independence until late 1970s after the introduction of PTA funds (MOE Boards, 2005). However, the country witnessed a decrease in completion rates from the year 1988. An example of the decline in completion rates was between 1988 and 1994. Overall, only 79% of those who entered Grade 1 in 1988 reached Grade 7 in 1994 (MOE, 1996). The completion rate is reported

to have decreased further between 1996 and 1998 with an increase in school dropout (MOE, 2000).

According to Kelly (1994), the introduction of cost-sharing brought about a severe decline in school participation, for example, completion rates went down from 100% in the mid 1980s to 75% in 1990s. About 10-15% of the final year pupils (grade 7) were unable to sit for examinations because of inability to raise the prescribed fees. Kelly further noted that the problem of low demand for primary education in both urban and rural areas reached alarming proportions around the year 2000 and onwards. In addition, Kelly (1994) pointed out that between mid 1980s and early 1990, in many Zambian rural schools only a small proportion of those who entered Grade 1 actually completed Grade 7. Some of the examples were as follows; Mbangatu School in Western Province recorded that out of 108 children, who entered Grade 1 in 1986, only 61 completed Grade 7 in 1992; from Chisale School in Eastern Province, 36 out of 88 children completed Grade 7 and Chibayi School in Northern Province recorded 13 out of 44 children who completed Grade 7 in 1992.

The decision to abolish statutory fees for grades 1-7 was made to serve the poor and vulnerable children in order to increase enrolment, retention and completion rates for basic education (MOE, 2006). According to records from the Ministry of Education in Zambia, pupil completion rates were recorded to have increased from 63.6% in 2000 to 72% in 2004 (MOE, 2005) and further to 81.6% in 2005 (MOE, 2006). The IOB report also indicated that according to recent figures of the Ministry of Education, completion

rates at Grade 7 increased from 67% to 82% between 2000 and 2006, then to more than 90% in 2007. IOB, (2008) reported a decrease in dropout rates between 2000 and 2006, and stated that as a result of decreasing dropout rates, completion rates had increased. In 2000, 66.7% of the children completed their primary education. In 2005, this percentage increased to 82.30 (IOB, 2008).

Table 2 below shows the trend of completion rates before and after the introduction of FBEP in Zambia.

Table 2: Completion Rates from 2000 to 2006

Year	Sex		Total
	Female (%)	Male (%)	
2000	56.80	56.80	56.80
2001	55.90	67.50	61.70
2002	55.60	68.10	61.85
2003	61.10	72.90	67.00
2004	65.80	78.30	72.10
2005	74.90	78.30	76.60
2006	79.40	91.00	85.20

Source: MoE EMIS Planning Unit (2005)

Table 2 shows that between 2000 and 2006, there was a gradual increase in completion rates, from 56.8% to 85.0%.

While statistics above show that there has been an increase in school completion rates since the introduction of the Free Basic Education Policy, little is known about the extent to which the policy has affected completion rates among pupils from poor families. A substantial indicator of this impact would be statistics of pupils who would have been out of school, but have been able to complete their education because of the policy.

A study by Petrauskis and Nkunika (2006) found out that the decrease in dropout rates was minimal; therefore increase in completion rates was insignificant. The study revealed that the magnitude of the problem of pupil retention and completion rate was still big with 15% of Zambian children unable to continue with school. A report by UNESCO (2006) contended that Zambia made major strides in increasing primary school enrolments, but drop out and completion rates were still poor. In the same vein, Mumba (2002) also observed that despite a great expansion in the provision of education, not all school age children are able to continue with school today. Wood (2005) further points out that by 2004; overall, only 72% were able to reach Grade 7.

The study by Kaulule (2006) on the Effects of Free Basic Education Policy in Selected Basic Schools in the Copper belt Province assessed the impact of the FBEP from a broad perspective. The findings of the study gave information about the views of parents, pupils, teachers and other stakeholders on the FBEP; enrolment rates and the effects of the policy on the Ministry of Education. The study did not, however, give information on the other aspects of access such as pupil retention and completion, since access to basic education is not only about enrolment.

CHAPTER THREE

METHODOLOGY

Introduction

This chapter presents the research methods which were employed in this study. It includes the following areas: research design, target population, sample size; sampling procedures, research instruments, data collection, data analysis and limitations of the study.

Research Design

The study used a survey research design. According to Sidhu (2002), a survey research is a kind of investigation that describes what is in existence in terms of effects and attitudes. It investigates the existing conditions, points of view that are held and effects that are being felt. This study was an investigation into the existing Free Education Policy for Grade 1 to 7. It was an attempt to find out the influence of the policy on the completion rates of pupils from low-income households.

Target Population

The target population of the study consisted of all Grade 7 pupils in all basic schools of Lusaka District. The reason for choosing this population was that the pupils who were in Grade 7 in 2008 were likely to have begun basic education (Grade 1) in 2002, the year in which free basic education was introduced and were therefore the first group to have a feel of the impact of the policy. The characteristics of the target population were suitable for the study because the pupils were in the last grade of middle basic education, making

it conducive for investigating how the free education policy affected their being in school from the time of enrolment to the stage of completion. The pupils would also have knowledge of the free basic education policy.

Study Sample

Table 3 below shows gender for the pupils and parents/guardians comprising the sample.

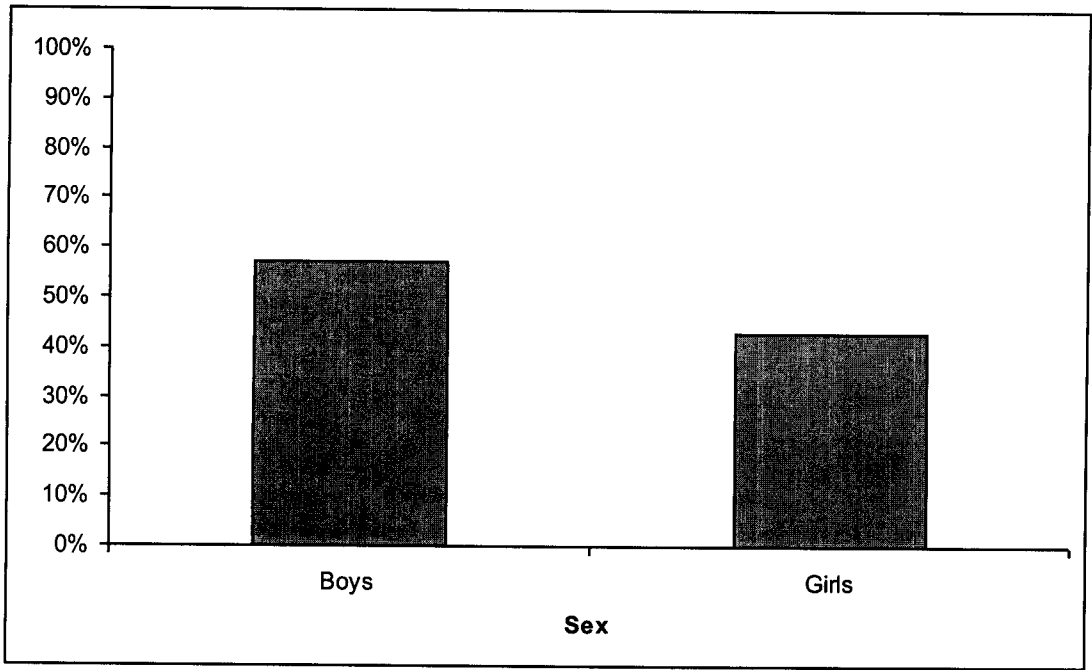
Table 3: Study Sample

Name of school	Pupils			Parents		
	Boys	Girls	Total	Male	Female	Total
Chibolya	11	9	20	-	8	8
Kalingalinga	10	10	20	1	7	8
Chawama	12	8	20	2	6	8
Bauleni	11	9	20	1	7	8
Mutambe in Mandevu	13	7	20	2	6	8
Total	57	43	100	6	34	40

Source: Field Data

The study sample comprised 100 pupils and 5 head teachers from 5 basic schools and 40 parents/guardians. These were not necessarily parents/guardians of children in the schools under study, but they were purposively selected from the townships of the study location. The purpose of including them in the study was to get the views of parents as they are the ones responsible for the education of their children and therefore bear the burden/ challenge of costs of education. They would be able to give an overview of whether or not the Free Basic Education policy has made their burdens lighter.

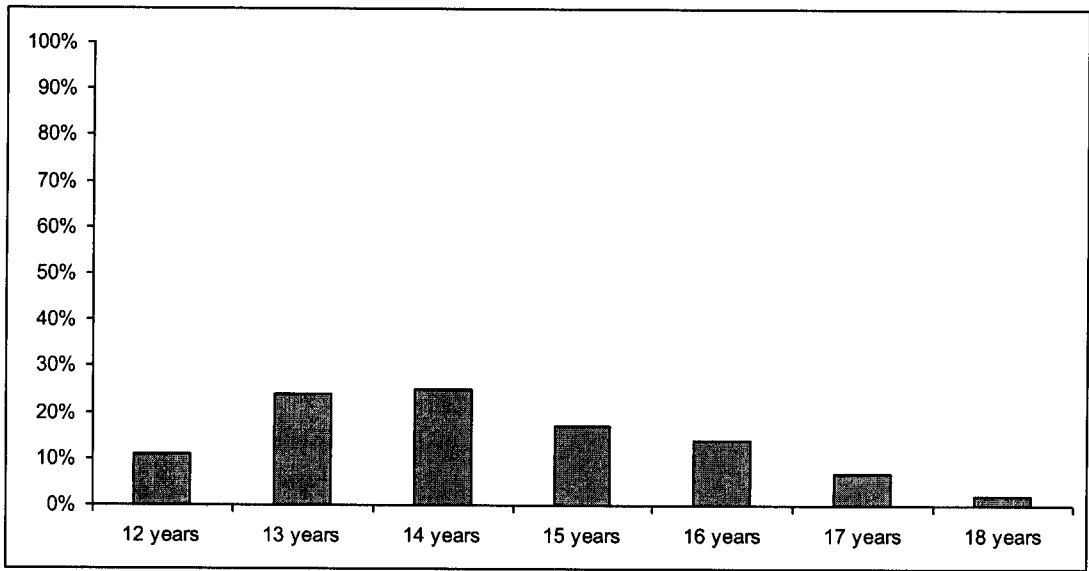
Figure 1: Gender of Pupils



Source: Field Data

According to Figure 1 above, fifty-seven pupils representing 57.0% of the sample were boys, while 43.0% were girls.

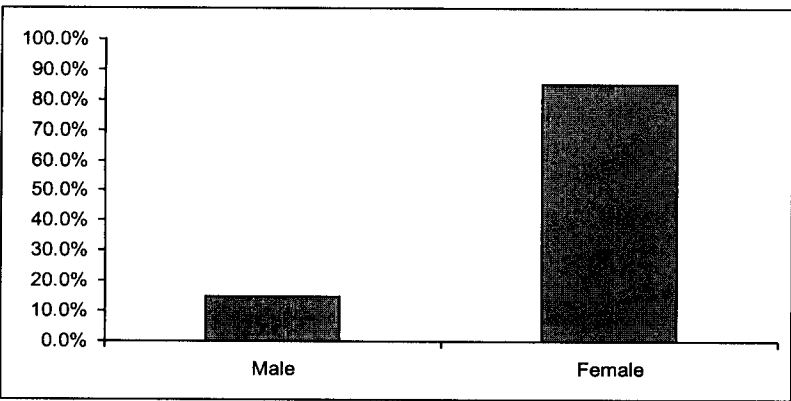
Figure 2: Age of Pupils



Source: Field Data

As regards the age of the respondents, the majority of the girls, 34 (51.1%) and boys, 32 (48.5%) fell in the age range of between 13 – 15 years old. This was followed by 2 (8.7%) girls and 21 (91.3%) boys who fell in the age range of between 16 – 18 years old. Seven girls (63.6%) and four boys (36.4%) fell in the age range of 10 – 12 years old. The value of including the variable of age ranges in the study was to verify that the pupils were within the stipulated age range for primary or basic education, which is normally between 7 and 15 years in Zambia.

Fig 3: Sex of parents/guardians



Source: Field Data

Like the pupils, parents/guardians were asked to indicate their sex and their ages. There were 34 (85.0%) female and 6 (15.0%) male parents/guardians, and their ages ranged from 37 years to 74 years old. Most of the respondents (12) fell in the age range of between 50 and 54 years old, representing 30.0% of the total respondents. This was followed by ten (25.0%) respondents who fell in the age range of between 40 and 44 years old. Eight (20.0%) respondents fell in the age range of 60 years old and above, while six (15.0%) respondents fell in the age range of between 35 and 39 years old. The rest, (4) respondents fell in the age ranges of between 45 and 49 years old and 55 and 59 years old , representing 20.0% each.

Marital status of parents/guardians

The inclusion of the variable was necessitated to find out whether or not marital status of parents/guardians would have any impact on their ability to provide for the children's educational needs, for instance, whether or not single or widowed parents had more difficulties than those with both spouses living together. As shown in Fig 4 below, among the parents/guardians interviewed, 26 (65.0%) were married, while ten (25.0%) respondents were widowed (25%). Four (10.0%) respondents were divorced.

Fig 4: Marital Status of Parents/guardians



Source: Field Data

Among the parents interviewed, 13 (65.0%) were married, while five (25.0%) respondents were widowed (25%). Two (10.0%) respondents were divorced.

Occupation of Parents/Guardians

The inclusion of this variable in the study was necessitated by the assumption that the socio-economic status of a household is usually related to the kind of employment parents/guardians are engaged in. The availability of income in a household may have an effect on the education accomplishment of children. This implies that the parents’/guardians’ socio-economic status might have an impact on the child’s education as regards their ability to provide the necessary school requirements. Table 4 below shows the various occupations of the parents/guardians in the study sample.

Table 4: Occupations of parents/guardians respondents

Occupation	Sex		Total
	Male	Female	
Unemployed	2	5	7
Business woman	-	20	20
House maid		2	2
Carpenter	1	-	1
Plumber	1	-	1
Security Guard	1	-	1
Tailor	1	3	4
Farmer	-	4	4
Total	6	34	40

Source: Field Data

Location of study area

The study was conducted in the following townships: Kalingalinga, Chibolya, Chawama, Bauleni and Mandevu. The rationale for selecting these townships was that they were among the high-density areas that would normally be inhabited by low-income households. The people of low-income include the lowly paid employees such as domestic workers, security guards, the unemployed (not in any form of employment due to old age or illness), the self-employed such as carpenters, plumbers, tailors and small scale farmers.

Sampling Procedures

The sampling procedures used in the study were purposive sampling and simple random sampling. The rationale for using purposive sampling was to restrict the sample to units considered by the researcher to be particularly typical of the population (Sidhu, 2002). Purposive sampling procedure was employed to select the basic schools of the study sample. Simple random sampling was applied to ensure that an unbiased cross section of the population was obtained. This sampling procedure was used to select pupils from each basic school under study.

The study population was divided into clusters according to geographical locations. Basic schools in Lusaka District were divided in 3 groups of: low, medium and high-density areas. This was to facilitate the identification of areas that were likely to have households of low socio-economic status. The focus of the study was pupils from low-income households. Therefore, the researcher purposely drew the study sample from high-density areas. This was on an assumption that the residents would be mainly of low -income households.

Five government-run basic schools were then randomly selected. These were Kalingalinga Middle Basic in Kalingalinga, Mutambe Middle Basic in Mandevu, Chawama Basic in Chawama, Chibolya Basic in Chibolya and Bauleni Basic in Bauleni. Simple random sampling was also used to select 20 pupils from each school. Eight (8) parents from each township and five (5) head teachers from the respective schools were selected using purposive sampling procedure.

Research Instruments

The research instruments employed in the study were questionnaires, semi-structured interviews and documentary analysis. The questionnaires were used to collect information from pupils and head teachers, while the semi-structured interviews were used to collect information from the parents/guardians. Documentary analysis was used to substantiate the data collected from the questionnaires and the semi-structured interviews.

Data Collection Procedure

Data were collected by administering questionnaires to pupils and head teachers in the 5 basic schools, while interviews with parents were employed.

Collection of data was done from 21st January to 5th March 2008. Prior to the collection of data, permission to visit basic schools in Lusaka District was obtained from the Provincial Education Officer (PEO) and the District Education Board Secretary (DEBS). Thereafter, the researcher sought permission from the head teacher of each selected school, to collect information from the respective school.

From each of the selected schools, 20 Grade 7 pupils were randomly chosen to complete the questionnaire. The questionnaire was meant for collecting information from pupils in relation to their individual biography, socio-economic status of the parents/guardians, possible challenges of getting school requirements, cases of drop out due to financial constraints and pupils' awareness of the free basic education policy.

The researcher guided the pupils in responding to the 15 items of the questionnaire, ensuring that there was clear understanding of each question. The researcher gave clarifications whenever need arose among the pupils.

From parents/guardians, data was collected by interviewing 8 parents/guardians randomly in each of the selected townships. A Semi-structured interview was conducted with each parent/guardian. The interviews contained 21 pre-planned structured questions. The researcher encouraged the respondents to express themselves freely and to give as much information as possible information on their biography, socio-economic status, size of household, awareness of the free education policy, challenges in providing school requirements for the children/dependants, accessibility of basic education after introduction of the free education policy, affordability of basic education and impact of the free education policy on the ability of the children to complete middle basic education.

To obtain data from head teachers, the researcher administered questionnaires to the five head teachers from the selected basic schools. The questionnaire for head teachers sought information on the implementation of the free education policy, accessibility of basic education, financial and material contributions demanded by schools, completion rates of pupils before and after the introduction of the free education policy and cases of drop out due to financial constraints.

In order to obtain honest responses and to allow the respondents to be free, the researcher assured the respondents of anonymity and confidentiality by asking them not to disclose or indicate their names.

Data Analysis

The Statistical Package for Social Sciences (SPSS) was used to analyse quantitative data from the questionnaires while qualitative data which was obtained through semi-structured interviews was analysed by coding and grouping the emerging themes. Computer generated tables of frequencies and percentages were used in describing distributions of the variables which were presented in the form of tables or bar charts.

Limitations of the Study

Questionnaires administered to 5 head teachers were not collected within the planned or intended period of the research. This was because 2 head teachers did not complete the questionnaires in the time agreed with the researcher. Moreover, the head teachers did not provide complete information particularly pertaining to actual school records on pupil completion rates. This had a negative impact on the achievement of some of the objectives of the study. The other set back was that some pupils and parents could not communicate well in English; hence the researcher encouraged the use of vernacular (Nyanja) and eventually had to decode the responses into English.

Furthermore, data collection was conducted during the rainy season; some target areas were not easily accessible due to floods. Hence, selection of households of the sample

was confined to easily accessible areas. The sample was rather small due to limited time and resources in relation to the entire population of basic schools in Lusaka hence sampling errors were inevitable. Therefore, the findings of this study ought to be generalized with caution.

CHAPTER FOUR

PRESENTATION OF THE FINDINGS

Introduction

This chapter presents the findings of the study whose aim was to establish the impact of the Free Basic Education Policy on enrolment and completion rates of pupils from low-income households in selected Basic Schools in Lusaka. The findings are presented with reference to the objectives of the study in the following order: to find out whether people of low-income households were aware of the Free Basic Education Policy, to find out the views of the respondents about the impact of the free education policy on access to basic education among children from low-income households and to compare the enrolment and completion rates of children from low-income households before and after introduction of the FBEP.

Awareness about the Free Basic Education Policy among Low-Income Households

The first objective of the study was to find out whether people of low-income households were actually aware of the FBEP. Among the pupil respondents, 98% indicated that they were aware of the FBEP. They indicated various sources of information from where they learnt about the policy. Some of the pupils pointed out that they were told by their teachers or head teachers, others from their parents/guardians, others still heard from the media such as radio and television.

For the parents/guardians 100% the respondents indicated that they were aware of the FBEP. Their sources of information included school administration through PTA meeting and the media. Among the respondents, 10 of them (50.0%) learnt of the FBEP from the media, i.e. television and radio, 6 parents (30.0%) disclosed that their children informed them, 2 parents/guardians representing 10.0% got information from the community while 2 others (10.0%) knew about the policy through the Parents Teachers Association (PTA) meeting.

Table 5: Parents’/Guardians’ sources of information about FBEP

Number of Parents/Guardians	Percentage (%)	Source of Information about FBEP
10	50	Media (radio and Television)
6	30	Children
2	10	Parents Teachers Association(PTA)
2	10	Community

Source: Field Data

Views of the Respondents about the Impact of the FBEP on Access to Basic Education

Pupils’ responses

The second objective of this study was to find out the views of the respondents on the impact of the FBEP on access to basic education. Therefore, pupil respondents were asked to give their views on whether or not it had become easier to access basic education

after the introduction of the policy. The pupil respondents were also asked to give reasons for their opinion.

Among the pupil respondents 60.0% indicated that it was not easy to access basic education while 40.0% were of the view that with the existence of the free education policy, basic education was easily accessible. According to the pupils who said basic education was not easily accessible, their parents/guardians were not able to meet expenses of school requirements such as exercise books, school uniform and school shoes, which were obligatory in some government basic schools at the time of enrolment and in the course of the basic education cycle. The pupils also explained that the free exercise books provided by the schools were not enough for all the subjects and also that they could not last the whole term. The parents were therefore obliged to buy some exercise books in order to supplement what the schools provided. When asked to explain why their parents/guardians could not easily meet the children's education costs, the pupils' responses were as shown in Table 6 below.

Table 6: Pupils’ reasons for Parents’/Guardians’ Difficulties to meet Education costs of their children.

Problems faced	Frequency	Percentage (%)
Grandparents too old to work	6	10.0
Inconsistent rental payment by tenants	5	8.3
Sometimes business not well for my parents	12	20.0
Salaries not enough	22	36.7
My parents are unemployed	15	25.0
Total	60	100.0

Source: Field Data

The research findings established that the outstanding problems faced by parents/guardians in paying for school requirements were attributed to insufficient finances and lack of employment.

Responses from parents/guardians

The study obtained different views from parent/guardian respondents on the impact of the FBEP on access to basic education. The majority of the respondents (70%) said that the policy had no significant impact because it was not easy to enrol children in school. Some of the reasons they gave were: ‘I still have to buy uniform, shoes, school bag and exercise books’, ‘I have no source of income; I am too old to work, all my children are dead’; ‘too many demands by the school, full uniform, ream of paper’; ‘school requirements are too high compared to our income’; ‘school requirements are expensive’; ‘I am no longer in employment’; ‘limited income in the home’. The study revealed that

for 80% of the government schools, a child was required to be in full uniform at the time of enrolment.

Parents/guardians further explained that education costs were still a major hindrance to accessing basic education. Although basic education was said to be free, parents/guardians still had to meet direct and indirect costs for the education of their children. The direct costs included exercise books, school bags, school shoes and uniform. The study found out that even when the FBEP stipulated that school uniform was not obligatory, 80% of the schools demanded that a pupil be in full uniform (including school shoes) when enrolling into grade 1.

The respondents also added that certain schools made it obligatory that uniforms be bought from the schools (which were usually more expensive), hence depriving parents/guardians to get them from cheaper sources. Parents/guardians further explained that the exercise books provided for free by the Ministry of Education in the schools were not enough to cater for all the subjects for each pupil and that they could not last the whole term, hence the parents/guardians still had the challenge of buying exercise books for their children.

The direct costs also included certain charges which parents/guardians were obliged to contribute towards the running of some basic schools. Among the parent/guardian respondents, 85% disclosed that they were obliged to contribute in form of cash which varied from K1, 000.00 to K20, 000.00 on monthly basis. Such contributions were for

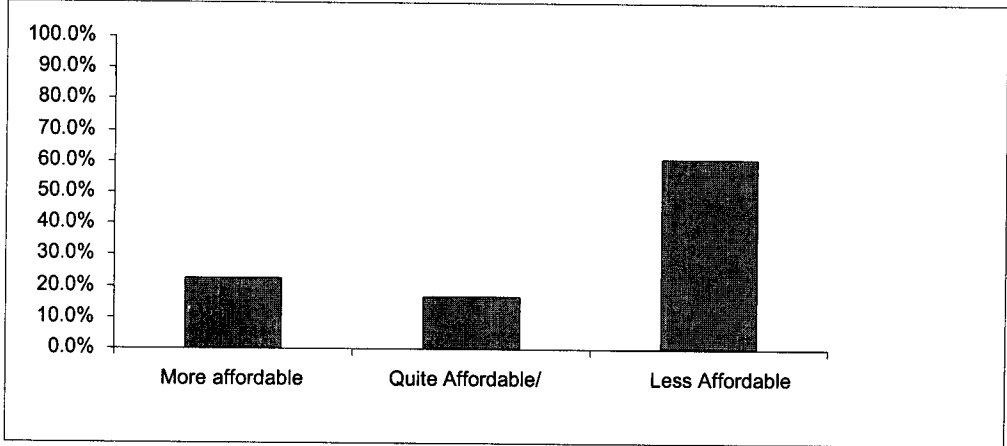
school maintenance requirements such as floor polish and brooms, and for security guards for some schools. Moreover, the study established that for schools with developmental projects like renovations of toilets, parents were obliged to contribute about K15, 000.00.

For the respondents (30%) who were of the view that the policy had a positive impact, the following were their reasons; ‘with the help of NGOs such as Children Christian Fund (CCF), we are able to buy school requirements’; ‘the school administration is flexible, full uniform is not obligatory’; ‘no longer paying school fees’; ‘children can go to school without school shoes’; ‘encounter less expenses as some books are provided by the school, we only have to buy a few exercise books’.

Other costs were said to be on transport to and from school and food whilst at school. According to the study findings, some children went to schools quite far from home as a result of change of residence or lack of space at a nearby school and therefore required to get on a bus to get to school.

The respondents were further asked whether or not basic education was more affordable than before the introduction of the FBEP. Their responses are shown in figure 5 below;

Figure 5: Parents’/guardians’ views on affordability of basic education after FBEP.



Source: Field Data

For the respondents (60%) who said that basic education had become less affordable after the introduction of the FBEP, their reasons were that they ‘did not have enough income to meet the demands of education’; ‘had a lot of debts to settle’.

Responses from Head Teachers

For the (five) head teacher respondents 100%) indicated that basic education had become more accessible after the introduction of the FBEP. The head teachers supported their views with the reason that there was an increase in the number of children in a classroom, which was beyond normal capacity. They explained that more children were able get into basic schools following the introduction of the policy as there were no longer restrictions on the basic requirements such as uniform or school fees.

The head teachers were asked to give their views on whether or not the FBEP was beneficial to pupils from the low socio-economic households.

Table 7: Head teachers’ views on whether or not the FBEP was beneficial to pupils from low socio-income households.

Head teachers’ comments	Percentage (%)
Very beneficial	80%
Quite beneficial	20%

Source: Field Data

The table above shows that 80% of the head teacher respondents indicated were of the view that the FBEP was greatly beneficial to the pupils from poor households. They explained that pupils were benefiting to a great extent in that they were receiving pupils free books from the government, they did not have to pay PTA funds, school fees or examination fees for those in Grade 7; some pupils also got more assistance from NGOs or churches.

Meanwhile 20% of the head teachers indicated that the FBEP was quite beneficial because parents from poor households were still struggling to meet their children’s educational needs.

The study also found out that some schools took deliberate measures to encourage pupils who seemed very poor and vulnerable. Two of the five head teacher respondents explained that they talked to parents and pupils to promote awareness that pupils could report to school even without full school uniform. Moreover, one respondent said their school also encouraged pupils to continue with school by counselling, closely monitoring pupils’ academic performance and providing the vulnerable pupils with basic school requisite such as shoes, books and food.

The Impact of FBEP on Pupil Completion Rates

The third objective of the study was to compare the completion rates of children from low-income households before and after introduction of the FBEP.

Pupils’ Responses

For the impact of the policy on pupil completion rates, 98% of the respondents were of the view that the policy had a positive impact because it helped them to remain in school from Grade 1 until they reached Grade 7, despite their parents not having sufficient income. However, they acknowledged that some of the pupils with whom they begun Grade 1, had stopped school because their parents/ guardians could not afford the education costs. The pupils were asked to indicate how many boys and/or girls had stopped school. Their responses are shown in tables 8 and 9 below.

Table 8: Number of boys who left school between 2002 and 2008 because of Parents’/guardians’ inability to afford the education costs

Number of boys who left school	Number of respondents	Percentage
1	18	54.5%
2	4	12.1%
3	6	18.2%
5	5	15.2%

Source: Field Data

Table 9: Number of girls who left school between 2002 and 2008 because of Parents’/guardians’ inability to afford the education costs

Number of girls who left school	No. of respondents	Percentage
1	10	52.6%
2	4	21.1%
3	3	15.8%
4	1	5.3%

Source: Field Data

Parents’/ Guardians’ Responses

The researcher sought to find out whether or not there was any difference in the number of pupils from the low socio-economic bracket that were able to complete basic school education. Among the parent/guardian respondents 75% disclosed that before the FBEP 80% of their eligible children could not complete basic education because it was too expensive to keep them in school. They lamented that with the little resources they had, they could only afford to support one or two children.

However, 25% of the parent/guardian respondents stated that100% of their eligible children was able to complete basic education because they had sufficient resources to meet the cost of education of their children.

After the introduction of the FBEP, some families still had difficulties in keeping their children in school. About 68% of the respondents indicated that despite the pronouncement of the FBEP, it was still difficult for them to have all their eligible children in school. This was attributed to insufficient resources to meet the education needs and other basics of the families. Some of them explained that with the increasing number of orphans in the country, households had become bigger than expected. Hence parents/ guardians faced the challenge of deciding on how many of the children to keep in school.

The respondents explained that the existence of the policy gave no guarantee that all their eligible children would be able to get into basic education and reach the last grade. According to the respondents, despite basic education being pronounced free, there were still a lot of educational expenses which some families could not afford; hence some of their children were not able to complete basic education.

Head Teachers' Responses

All the five head teachers (100%) in the schools under study indicated that there was a significant increase in completion rates after the introduction of the FBEP. They also claimed that the effect of the FBEP was an increase in the number of pupils from poor families going to Grade 7; completion rates had increased.

The head teachers were further asked to give their views on the extent to which pupils from low-income households benefited from the FBEP; 80% of the head teacher

respondents indicated that pupils from low-income households benefited very much from the FBEP. On the other hand, 20% felt that the benefits are not so much. Those who indicated that the pupils from low-income families benefited greatly from the FBEP explained that their children received free books from Government grants, paid no PTA funds making parents spending less on their education.

CHAPTER FIVE

DISCUSSION OF THE FINDINGS

Introduction

This chapter is a discussion of the major findings that came out of this research. The discussion of the findings is presented with reference to the objectives of the study in the following order: to find out whether people of low-income households were aware of the Free Basic Education Policy, to establish the effects of the free education policy on access to basic education among children from low-income households and to compare the enrolment and completion rates of children from low-income households before and after introduction of the FBEP.

Awareness About the Free Basic Education Policy among Low-income Households

All respondents (100%) representing pupils and parents/guardians expressed awareness of the Free Basic Education policy. The study established that dissemination of information among the beneficiaries was effectively done. Various means of communication such as television, radio and PTA meetings were used to enlighten the pupils and parents/guardians about the policy. Their knowledge about the FBEP was essential for them to be in position to give a real picture of what was happening on the ground. It was an indication that the people were aware of the conditions stipulated in the policy and therefore they knew what to expect.

Views of Respondents on the Impact of the Policy on Access to Basic Education

In line with the responses obtained from the pupils and parents/guardians, the study established that 60% of the pupil respondents and 70% of parent respondents were of the view that the FBEP did not have a significant effect on access to basic education for the low-income households. They explained that it was not easy to access basic education despite the introduction of the policy. The parents revealed that it was difficult to enrol a child because most government basic schools demanded that a child be in full uniform at the time of enrolment.

This was rather a contradiction to the guidelines stipulated by the policy which states that no child should be turned away from a government basic school on the basis of not having a school uniform. If school uniforms were still obligatory right at enrolment, the poor members of society would be disadvantaged because they may not be able to meet all the expenses. No wonder the respondents pointed out that the policy had no significant effect, for they still had to bear the burden of buying school uniforms. This was an indication that the purpose of the FBEP was not strictly realized. This finding was in conformity with a study by Mwansa et al. (2004) which found that despite the policy guidelines, uniforms were still compulsory in some schools. This also agreed with an observation by OXFAM (2007) that governments paid lip-service to the idea that basic education should be free; they needed to do more to address it in reality. The implication drawn was that government needed more enforcement in ensuring that the guidelines well stipulated on paper may be put to reality in schools to be appreciated by the poor people for whom the FBEP was targeted for.



One of the FBEP guidelines stipulates that no Grade 1-7 pupils should be levied any user fees including PTA levies. Instead, PTAs may raise funds for specific school projects through raffles and other legitimate means after getting clearance from the Provincial Educational Officer. However, the reality was that households were required to contribute in cash towards the respective schools' maintenance and projects. This revealed that the policy guideline regarding removal of any form of user fees was not implemented accordingly. Instead, the terminology of the fees was seemingly disguised. This conformed to Tomashevski (2006) who argued that despite the pronouncement of FBEP, some schools did not completely abolish user fees, but rather they re-named them.

The study revealed that some basic schools still had school uniform as a compulsory requirement and in some cases was commercialized whereby parents were obliged to buy their children's uniform from one source recommended by the school, which tended to be more expensive than other sources. With the FBEP in place, school uniform was not be compulsory and therefore no pupil was to be prevented from attending school on account of failure to obtain it. Schools that chose to continue with the uniform requirement should not commercialize its acquisition by forcing parents/guardians to buy from schools as a way of fundraising. Uniforms had to be plain and simple and parents could be able to get it from the cheapest source of their choice. Therefore there was need to strictly adhere to the policy guideline on uniform for free education to be appreciated by the people it was meant to serve.

In addition, the study established that access to basic education among the low-income households was hindered by direct costs which were inevitable. Majority of the respondents (70% of the parents/guardians and 60% of the pupils), said school had become “more expensive” than before. According to the pupils, the exercise books provided by the government for free were not sufficient for all the subjects and to last the whole term, therefore households still had to meet the costs of buying books to meet the required number. Other costs were in form of contributions towards school projects.

The study found out that despite basic education being pronounced free, there were still a lot of costs that households had to meet. One would therefore argue that in the real sense, basic education has not been made free enough to allow even the poorest members of society to access it. The abolishment of school fees and uniform per se seemed to have just solved a tip of an ice berg of the whole problem of making education affordable for the poor members of society. This also explains why the respondents could not appreciate the effect of the FBEP. Free education could be upheld only if education was significantly affordable to the poor. This conformed to the DFID (2001) report that even where education is normally free, some direct costs may reach up to 20% of a family's income, making education unaffordable to some households.

The direct cost of accessing education seemed to be more prohibitive than the school fees which were formerly administered by schools and that the policy of free education in itself may not be sufficient enough to allow children from low- income families to access education. This could be related to the observation made by OXFAM (2007), that

households face a bewildering array of education charges, in form of costs for books, pencils, transport, food and uniforms. Parents consistently cite cost as the major factor in deciding to keep children out of school. Success in achieving universal basic education depends on education becoming affordable to the poor.

Nonetheless, 30% of the parent/guardian respondents said that FBEP had an effect on access to education, stating that education had become affordable. They attributed their responses to the fact that they no longer paid user fees and that children could go to school without school uniform as it was no longer compulsory. They also said that they encountered fewer expenses as some books were provided by the school. The issue of school uniform being optional in some schools revealed that some schools were abiding by the guidelines of the FBEP about school uniform. This was beneficial to some low-income households because they could not feel the burden of the costs of school uniform; they could actually save or use the money for other basic needs of the families.

The five head teachers in the study were of the view that there was more access than before the FBEP as manifested by the increase in the number of pupils in a classroom. They attributed their positive response to the increased enrolment of pupils in schools. This finding conformed to those of Manzo's (2006) findings which revealed that the introduction of free education in Sub-Saharan African countries led to an increase in enrolments such that classrooms in government primary schools were filled beyond normal capacity. The findings also agreed with studies conducted by Matabishi (2004)

and Kaulule (2006) which revealed that the FBEP had a positive effect on pupil enrolment in that there was an increase in enrolment.

However, considering the margin of increase in enrolment in Zambia as compared to Uganda and Malawi (IOB, 2008), the study ascertained that more needs to be done. Between 2002 and 2005, enrolment rates in Zambia grew by 11%, while Uganda and Malawi recorded 51% and 47% respectively, in two years after introduction of free education (IOB, 2008).

Completion Rates of Children from Low-Income Households Before and After Introduction of the FBEP.

According to some parents/guardians, there was a marginal difference in completion rates in that it was still difficult for them to retain their children in school due to various financial difficulties they faced. This was in conformity with Colclough and Lewin (1993) who argued that the major cause of low demand for basic education is poverty in the sense that even where educational returns are high; the direct and indirect costs of school attendance are often too great for poor families to afford. Despite basic education being pronounced free, there were still a lot of educational costs which some families could not afford; hence some of their children were not able to continue with basic education.

The study showed that a number of parents under study were either informally employed or formally employed but with low paying jobs implying that their households had minimum income. Majority of the parents/guardians interviewed indicated that it was

difficult for them to keep their children in school because their income was insufficient to meet the school requirements as well as the other basic needs of the family such as food and health care. Therefore, parents/guardians were faced with a challenge of deciding whether to keep their children in school or use the limited resources on food.

This finding agrees with Chimombo (2005) that children from poor socio-economic backgrounds are least likely to attend or complete primary school than children from better off families. The finding of the study also conforms to World Bank (2007) that poverty is one of the contributing factors why about 77 million children in developing countries are out of school today. Moreover, Colclough and Lewin (1993) argue that the major cause of low demand for basic education is poverty in the sense that even where educational returns are high; the direct and indirect costs of school attendance are often too great for poor families to afford.

This finding conforms to the arguments of other studies that though more children are able to get into basic school, not all of them are able to continue to the end of the cycle. A report by UNESCO (2005) recorded that despite an increase in the number of children going to school today, many are not able to go beyond Grade 5 of primary school. A study by Petrauskis and Nkunica (2006) found out that the magnitude of the problem of pupil retention and completion rate was still big with 15% of Zambian children being unable to continue with education.

The findings of the study from the interviews with the parents revealed that a number of children were unable to complete Grade 7 before the introduction of the FBE policy. However after the introduction of the FBE policy the percentage of children failing to complete Grade 7 dropped. These views conformed to the statistics from Kelly (1994) and MoE EMIS Planning Unit (2005) that between 1986 and 1992, there was a reduction in completion rates, from 107.1% to 83.1%.

The head teachers were of the opinion that there was a substantial increase in completion rates as compared to the period prior to the implementation of the policy. Although the head teachers interviewed could not provide statistics on completion rates for the years 1998 to 2007, the majority of them were of the opinion that the completion rates were low before the introduction of FBEP and increased after implementation of the FBEP. These findings are in agreement with Lungwangwa (1999)'s account of the scenario before the introduction of the policy that among children who entered primary education, a significant proportion could not complete the cycle. For example in 1996, 650,000 children were out of school compared to 1, 506,650 who was in school (Lungwangwa, 1999).

These findings are also in agreement with those of the Ministry of Education (2005) which recorded the increases in completion rates from 63.6% in 2000 to 72.0% in 2004 and further to 81.6% in 2005 (MOE 2006). This is an indication that the completion rates after the introduction of the policy had increased. The study's findings also conformed to the IOB report (2008) that from 2003, the number of pupils in grades 4-7 had

significantly increased. As a result of decreasing dropout rates, completion rates increased between 2000 and 2006. In 2000, no more than two out of three children completed their primary education. In 2005, this percentage had increased to 82.30% (IOB, 2008).

CHAPTER SIX

CONCLUSION AND RECOMMENDATIONS

Conclusion

The Free Basic Education Policy in Zambia was introduced with the view to providing education opportunities to poor children. In February 2002, the President announced Free Basic Education for Grades 1-7. Statutory fees for these grades were abolished in order to improve enrolment and retention, especially of children from low-income households. Moreover, school uniforms were no longer compulsory.

The core problem of this study was whether or not the FBEP would enable children from poor families to enrol and complete basic education level. The focus of the study was to ascertain the impact of the Free Basic Education Policy on enrolment and completion rates of pupils from low-income households in selected Basic Schools in Lusaka district.

The first objective of the study sought to find out whether or not low-income households were aware of the FBEP. The study established that pupils and parents /guardians from low-income households knew about the pronouncement of the FBEP. The study concluded that dissemination of information on the provision of free education was successfully carried out by government to the beneficiaries of the policy.

For the second objective which was to find out the views of respondents on the impact of the FBEP on access to basic education among children from low-income households, the

study found out that the majority of the pupil and parent/guardian respondents (60% of the pupils and 70% of the parents/guardians) were of the view that access to basic education was hindered mainly by the direct and indirect education costs. The costs of exercise books, school uniform and school shoes were too high for the limited resources of most of the low-income households. Some children were unable to access basic education because their parents/guardians would not afford the education costs.

From the respondents' views, the study found out that some of the guidelines of the FBEP were not implemented accordingly by some government schools. Some government basic schools insisted that school uniform was obligatory and demanded from parents/guardians for financial contributions towards school maintenance or renovation projects. The study therefore concluded that the impact of the FBEP on access to education among children from low-income households was unsatisfactory because households incurred high education costs despite basic education being pronounced free.

As a finding to the third objective, the study established that there was a substantial increase in pupil enrolment and a reasonable increase in completion rates among children from low-income households; however, there were still a significant proportion of children who were unable to complete basic education. The margin of increase in enrolment and completion rates between the period before and after the FBEP leaves much to desire for Zambia to achieve 100% access to basic education. Although it was quite easy to enrol children into Grade 1 (particularly in schools where uniform was not obligatory), keeping the children in school eventually became difficult due to increased

expenses as they ascended the basic education ladder. The study therefore concluded that there was minimal difference in enrolment and completion rates of children from low-income households before and after the FBEP.

The findings of the study were in conformity with the theory of Social Stratification. This is with regards to the conditions in form of “hidden” costs attached to accessing basic education. The poor members of society are not able to meet the costs of school uniform, shoes, and books; as such they may have fewer advantages to basic education achievement as compared to the wealthy members of society.

Recommendations

- The study revealed that even when the FBEP stipulated that school uniform was not obligatory, some basic schools demanded that a child should be in full uniform especially at enrolment. Therefore, the Ministry of Education should increase efforts to educate the basic school managers (head teachers) on the provisions of the Free Basic Education Policy concerning school uniform.
- The study found out that the free exercise books provided by schools were not enough for all the subjects and could not last the whole term. As such, households still had to meet expenses of exercise books. The government should consider providing enough exercise books for every pupil so that parents/guardians, particularly poor households would not have to face the costs of buying books.
- The Ministry of Education should increase the provision of bursaries to children from low-income households in order to promote enrolment and completion rates.

According to the study finding, despite the introduction of the FBEP, some families still had difficulties in keeping their children in school. About 68% of the respondents indicated that despite the pronouncement of the FBEP, it was still difficult for them to have all their eligible children in school. This was attributed to insufficient resources to meet the education needs and other basics of the families.

The respondents explained that the existence of the policy gave no guarantee that all their eligible children would be able to get into basic education and reach the last grade. According to the respondents, despite basic education being pronounced free, there were still a lot of educational expenses which some families could not afford; hence some of their children were not able to complete basic education.

- The study could not access statistical information from the head teachers on pupil enrolment and completion rates due to non availability of records. The study therefore recommends that basic school administration should document and properly manage information relating to school enrolments and completion rates.

Suggestions for Future Research

This study was centred on the Impact of the Free Basic Education Policy on Enrolment and Completion rates of pupils from low-income households in selected basic schools in Lusaka district. Whilst revealing some of the challenges of the FBEP, the study presents issues for future research as follows:

- An in-depth review of the implementation of the Free Basic Education Policy guidelines.
- A comprehensive assessment of the compliance of basic schools to the Free Basic Education Policy guidelines.
- A comprehensive assessment on the impact of the Free Basic Education Policy on access to education among children in rural areas.

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APPENDICES

Appendix A: Questions for Pupils' Questionnaire

- 1. Are you a boy or girl? Boy () Girl ()
- 2. How old are you?
- 3. In which grade are you?
- 4. What is the name of your School?
.....
- 5. Where do you live?
- 6. Do you live with your parents? Yes () No ()
- 7. If your answer to question 6 is No, whom do you live with?
Aunt () uncle () sister () brother () grandmother () grandfather ()
- 8. What is the job your parent(s)/guardian(s)?
.....
- 9. Who pays for your school requirements like books, shoes and uniform?
.....
- 10. Are you aware of the Free Education Policy of Zambia? Yes () No ()
- 11. With the free basic education policy, is it easier for your parents/guardians to put you in school? Yes () No ()
- 12. Give reasons to your answer.....
.....
.....
- 13. Do your parent(s)/ guardian(s) face any problems in buying books, shoes or uniform?

Yes () No ()

14. If your answer to question 13 is yes, explain what problems they face.

.....

.....

.....

15. Are there any pupils from your class who have stopped school because their parents or guardians could not buy them books, shoes or uniform? Yes () No ()

16. If your answer to question 15 is yes, how many? Boys () Girls ()

17. Are you aware of the Free Education Policy of Zambia? Yes () No ()

18. If your answer to question 17 is yes, has free education helped you to continue with school?

Explain.....

.....

.....

THANK YOU FOR YOUR COOPERATION!

Appendix B: Interview Questions for Parents/Guardians

- 1. Age:
- 2. Sex: Male () Female ()
- 3. Marital Status: Married () Single () Widowed () Divorced () Separated ()
- 4. If divorced or widowed, since when?
- 5. Occupation:
- 6. Number of children: BoysGirls
- 7. How many dependants, if any? Boys Girls
- 8. How many of your children are going to basic school? Boys..... Girls.....
- 9. How many of your dependants are going to basic school? Boys.... Girls.....
- 10. Are you aware of the Free Basic Education Policy? Yes () No ()
- 11. If your answer to question 10 is yes, how did you know about?
.....
.....
- 12. With the existence of the Free Basic Education Policy what educational costs are you expected to meet for the basic education of your children and or guardians?
.....
.....
- 13. Are you able to meet these costs? Very easily () Not easily () Not able ()
- 14. If you are unable to meet the costs, please give reasons.

.....
.....
.....

15. With the implementation of the free education policy is it easier for you to enrol your children and/ or dependants into basic school?

Very easy () Easy () Not Easy ()

16. Please explain your answer to question 15.

.....
.....
.....
.....

17. Is basic education more or less affordable now than before the introduction of the free education policy?

More affordable () Affordable/ no difference () Less affordable/ more expensive ()

18. Please explain.....

.....
.....
.....

19. Has any child from your household dropped out of basic school

a) Before the free education policy? Yes () No ()

b) After the free education policy? Yes () No ()

20. How many children from your household were able to complete basic education before the introduction of the free education policy?

21. How many children from your household have been able to complete Grade 7 since the introduction of the policy?

THANK YOU FOR YOUR COOPERATION!

Appendix C: Questionnaire to be Completed by Head Teachers

The following questions are part of a study on the **Impact of the Free Basic Education Policy on Completion Rates of Pupils from Low-income families** in selected basic schools of Lusaka District. You are kindly requested to complete the questionnaire with the information as accurately as possible. The information you will provide to the questions will be of great relevance to the purposes of this study.

Kindly do not give your name.

- 1. Name of the school:
.....
- 2. When did your school begin to implement the Free Basic Education Policy?
.....
- 3. What criteria does your school use for identifying pupils from low-economic households?
.....
.....
.....
.....
- 4. With the implementation of the free basic education policy, is basic education more or less accessible among children from low-income households?

More accessible () No difference () Less accessible ()
- 5. Kindly give an explanation for your answer to question 4.

.....

.....

.....

.....

6. What measures has the school put in place to encourage pupils from poor families to continue with school?

.....

.....

.....

.....

7. What educational costs does your school expect households to meet?

.....

.....

.....

8. What are the effects of Free Basic Education Policy on the Completion rate of pupils from poor families at your school?

.....

.....

.....

.....

9. Are the pupils from poor families benefiting from the Free Education Policy?

Very much () Not very much () Not at all ()

10. Please give an explanation to your answer?

.....

.....

.....

.....

11. How many pupils were able to complete Grade 7 between 1998 and 2002?

12. How many pupils were able to complete Grade 7 between 2003 and 2007?

13. After the implementation of the free education policy, were there any pupils who left school before completing Grade 7 because their parents/ guardians could not meet the educational costs since 2003? Yes () No ()

14. If your answer to question 9 is yes, how many?

THANK YOU FOR YOUR COOPERATION!