

# **Domestication of SDG 4 into quality inclusive education in Zambia; Policy issues and implementation challenges**

Beatrice Mambo and Madalitso Khulupirika Banja  
*The University of Zambia*

## **ABSTRACT**

*This study assessed the compliance level of rural Primary schools to the Free Basic Education (FBE) Policy guidelines in Monze District of the Southern Province of Zambia. The study used a descriptive survey design with 130 respondents and used simple random and purposive sampling techniques to select respondents. Questionnaires and interviews were used in collecting data. Qualitative content analysis revealed that rural primary schools failed to comply with FBE guidelines due to inadequate and delayed funding from the government. Non-compliance to FBE policy guidelines led to schools demanding fees from pupils. This led to pupil absenteeism and dropping out of school. The study concluded that free education remained a pipedream for some families due to a combination of poor funding from government and poverty among rural people. The study recommends that government funding to rural primary schools should be increased to make the attainment of universal primary education a reality.*

**Key words:** Basic education, free education, policy guidelines, compliance and non-compliance, user fees

## **Contextual background**

This article is about assessing the compliance level of rural Primary schools to the Free Basic Education (FBE) Policy guidelines in Monze District of the Southern Province of Zambia. The literature demonstrates that, nations worldwide mounted a global movement for free primary education that inspired countries to invest in their future generations. This was anchored on the realisation, as Bwalya (2012) has stated, that education has an important role to play in the social and economic development of a country (Bwalya, 2012). It is for this reason that education has been formally recognized as a human right, placing education high on the agenda of the international community. This is reflected in the SDG 4's 3 underlying principles that recognise education as not only a fundamental human right, but also as a public good, in which the role of the state is essential in setting and regulating standards and norms (UNESCO, 2009).

As a result of this global commitment to education, the right to education is affirmed in numerous human rights treaties and recognized by governments as pivotal in the pursuit of development and social transformation (UNICEF, 2007). Pursuit to this belief in the value of education, the General Assembly held in Ethiopia in 1948 came up with the Universal Declaration of Human Rights which became a standard that nations had to follow (UN Universal Declaration of Human Rights, 1948). With it, education as a Human Right was universalized by way of

making Basic education free and accessible to all. Right from the onset of the FBE, various nations went about trying to implement it by abolishing User fees. Through the Millennium Development Goals (MDGs) established in 2000, governments committed to achieving universal access to free, quality and compulsory education in the primary sector by 2015. The MDG Report 2015 found that the 15-year effort to achieve the eight aspirational goals set out in the Millennium Declaration in 2000 was largely successful across the globe, while acknowledging shortfalls that still need attention, such as the number of children that were still out of school. The MDGs established among others, measurable, universally-agreed objectives for expanding primary education to all children. They also kick-started a global movement for free primary education, inspiring countries to invest in their future generations. Among the key MDG achievements is the fact that ‘the number of out of school children has dropped by more than half (since 1990)’ (UNDP, 2018).

However, since the MDGs had not been successfully implemented by 2015, they were succeeded by the Sustainable Development Goals (SDGs), in 2015 and the target period extended to 2030. The Sustainable Development Goals (SDGs) were born at the United Nations Conference on Sustainable Development in Rio de Janeiro in 2012. The objective was to produce a set of universal goals that meet the urgent environmental, political and economic challenges facing the world. The 2030 agenda for sustainable development was adopted by all United Nations member states in 2015 and provides ways in which people and the planet can have peace and prosperity now and in the future. This push is anchored on seventeen Sustainable Development Goals (SDGs), among which is quality education under goal number 4 which is quality education. The Sustainable Development Goal 4 aims to ensure inclusive and equitable quality education and lifelong learning opportunities for all (<https://www.zm.undp.org/content/zambia/en/home/sustainable-development-goals/background>)

In line with the outcome targets for universal primary and secondary education, the SDG 4 aims that by 2030, all girls and boys, irrespective of personal or other circumstances, especially those in vulnerable situations, should have equal opportunity to complete 12 years of free, publicly-funded, inclusive, equitable and quality primary and secondary education, without discrimination, of which 9 years should be compulsory and lead to relevant and effective learning outcomes. ((Global Campaign for Education, 2020). This goal ensures that all girls and boys complete free primary and secondary schooling by 2030. Achieving inclusive and quality education for all reaffirms the belief that education is one of the most powerful and proven vehicles for sustainable development. This is particularly important when one considers that ... children from the poorest households are up to four times more likely to be out of school than those of the richest households. Disparities between rural and urban areas also remain high. Nonetheless, several African countries including Zambia, are building on the achievements attained by translating the ambitions articulated in the 2030 Agenda into their national visions and plans (2018). Significant progress on the MDGs on education has

been achieved through enrolling more children in primary school than by the close of the MDGs in 2015 91% enrolment in primary education had been achieved in developing countries representing a significant drop in out of school children of primary school age from 100 million in 2000 to an estimated 57 million in 2015 (<https://www.zm.undp.org/content/zambia/en/home/sustainable-development-goals/goal-4-quality-education.html#targets>)

### ***Domestication of the 2030 Agenda in Zambia***

In an effort to attain the SDG 4 on inclusive education, the Ministry of Education in Zambia in 2002 (Ministry of Education, 2002) stipulated the following policy guidelines:

- (i) No Grade 1-7 pupils should be levied any fees.
- (ii) No pupil should be denied enrolment or excluded from school for failure to contribute to PTA activities.
- (iii) Enrolment of pupils shall be unconditional and should not be linked to contributions of items such as cement, reams of paper, slashes, and so on.
- (iv) School uniform is not compulsory.
- (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 school.

What all these international and local instruments and policies are pointing to is a push towards inclusive education. According to BC Inclusion (n.d), inclusion is not simply integration or “mainstreaming” of students who were once characterized as different or special compared to “the mainstream.” Inclusion is not just about people with disabilities’. Inclusion removes systemic barriers that persist in legacy systems that were designed with a narrower understanding of who belonged in normal society. In line with this, the Ministry of General Education in Zambia through the Curriculum Development Centre (Curriculum Development Centre, 2013: 18) has set out to domesticate the 2030 Agenda by stating that:

The education system seeks to promote equality of access, participation and benefit to all regardless of their individual needs and abilities through institutions of learning putting in place measures to promote equity and equality in their programmes such as ‘allocating more resources to those in greatest need; providing appropriate support systems such as bursary schemes, provision of school meals and remedial activities for slow learners; employing strategies to support children at risk, such as those with Special Educational Needs (SEN) and the Orphans and Vulnerable Children (OVC); and eliminating sources of educational disadvantages in order to enhance equity. Such educational impediments may be due to ... economic or social factors.

In Zambia, the government’s commitment to education has been clear since it passed the 1964 Education Act governing the financing and management of education in the country (Ministry of Education, 2016). Basic education was declared free and compulsory for every child. As time went by, however, this could

not be sustained because of the economic crisis of the 1970s. Government came up with a Cost Sharing Policy that required user fees and Parent-Teacher Association (PTA) fees from pupils (Ministry of Education, 2005). Challenges have continued to date. The introduction of these fees became an obstacle to accessing basic education by many children. The government in turn got concerned and this led to the pronouncement of the Free Basic Education Policy (FBEP) for Grades 1-7 by the Zambian government in 2002. The 2002 policy on Basic Education in Zambia outlined five main guidelines for the implementation of Free Basic Education. To back up the policy, government allocated sector funds and provided infrastructure and learning materials to schools (Ministry of Education, 2005).

In his research Chibwe (2018) points out that the Government of the Republic of Zambia is currently domesticating and implementing the Sustainable Development Goals through the Seventh National Development Plan (7NDP) covering the period 2017-2021. The SDG 4 is well articulated in pillar 4 of the 5 pillars of the 7NDP known as Human Development. In addition, through the Ministry of General Education Zambia is fully implementing the SDG 4 through the National Education Policy Education Act of 2011. To achieve Universal Primary Education, the Zambian government passed the Free Basic Education Policy (FBEP) in February 2002 with implementation guidelines for smooth and easy adherence by the schools (Ministry of Education, 2002). The major challenges currently faced by the government in attaining its policy objectives entails that, strategic options for addressing them such as the different international and local instruments and policies need to be contextualised if set targets are to be attained by different countries across the globe, particularly those in developing countries such as Zambia. This points to the need to go beyond policy guidelines to implementation. In the context of this study, this means, among other things, that we need knowledge about factors affecting compliance which would help in understanding why schools are unable to implement free education in the country, and this would also help policy makers intervene appropriately in order to achieve free, quality and compulsory education.

In this article, therefore, we undertake to assess the level and extent of compliance with the FBE policy guidelines in terms of the domestication of SDG 4 and its implications for quality inclusive education in rural primary schools of Zambia so as to establish if or not education was free and readily accessible. The study was guided by the following research questions:

1. To what extent do Primary schools in rural areas comply with the Free Education Policy guidelines in the Ministry of Education circular of 2002?
2. What are the reasons for non-compliance of rural primary schools with the Free Basic Education Policy guidelines?
3. What are the consequences of non-compliance with the Free Basic Education guidelines on rural primary schools?

## **Methodology**

This section discusses the methodology that was used to collect and analyze data. This study utilized a cross-sectional descriptive survey design to ascertain by describing and exploring with the aim of eliciting detailed qualitative and quantitative information from the viewpoints of pupils, teachers, head teachers and parents/guardians. The survey method uses questionnaires and interview checklists to collect data (Creswell, 2009). A mixed methods approach encompassing both qualitative and quantitative methods was used to collect data. Creswell (2012) points out that the mixed methods approach is one of the most popular and effective designs in educational research. The chosen design had the potential to enrich the results in ways that one form of data could not allow (Creswell & Plano-Clark, 2011).

The study used probability and non-probability sampling techniques. The probability sampling technique used was simple random sampling which was used to select pupils and teachers. To get a fair sample, a number was assigned to every population member and then the *n*th member from that population was chosen. Purposive sampling method, a non-probability sampling technique, was used to select the primary schools, the head teachers, and the parents/guardians in order to target suitable respondents and bring out rich information related to the central issue being studied for in-depth analysis (Kombo and Tromp, 2009). Thirty percent of the total number of pupils and teachers in a given school was used to come up with the total number used at each school because some schools had fewer pupils and teachers than others, so the percentage used could allow for the normal distribution of the sample.

The study was conducted in five rural primary schools, code-named A, B, C, D, and E. The sample comprised of 130 respondents broken down as follows: 84 pupils, 26 teachers, 15 parents/guardians, and 5 head teachers. The teachers and pupils responded to a questionnaire while head teachers and parents/guardians were interviewed during one-on-one interviews that lasted round 30 minutes per respondent. A questionnaire was administered in person to the sampled pupils and teachers while the interview data were collected using note-taking during the interview and writing the main features of the responses after the interview, and phone-recording during the interview, and then transcribing after the interview. Collection of data was done between 8<sup>th</sup> October and 1<sup>st</sup> November 2017.

At the outset of this research, the questionnaires and semi-structured interview schedules were validated by the researcher and the supervisor who examined the face and content values of the instruments. Necessary corrections were made in order to improve the instruments. Further, test re-test method was used to determine the reliability of the research instruments by administering the same questionnaires twice over a period of one week to a group of respondents at a rural primary school outside the sample of the study. The data collected were correlated in order to evaluate the test for stability over time.

Quantitative data that covered variables such as age, level of education, etc from questionnaires were analysed by the use of descriptive statistics in form of percentages and frequencies. For qualitative data, we performed thematic analysis to categorize data into emerging themes in line with the research questions. The data generated from the individual interviews were integrated and verified in light of the literature review.

Ethical clearance was obtained from the University of Zambia. The ethical principles on which the research was anchored were informed consent to ensure voluntary and safe participation, confidentiality and anonymity. We anticipated that both pupils and parents/guardians would feel uncomfortable to discuss financial matters in the schools where they were enrolled and had enrolled their children respectively. We obtained informed consent and assent from the parents/guardians since the pupils were aged between 7 and 14 years. The principle of voluntary participation was clearly explained to the participants.

We also acknowledge certain limitations of our study. The researcher had to translate and interpret some of the questions in the questionnaire into the local language (Chitonga) due to poor English Language skills on the part of pupils. This limitation was overcome because the researcher was competent in the local language, and this reduced the huge risk of the meaning of the questions being misunderstood by the research participants. Secondly, there is a limitation with regard to the generalisability of the research findings to other areas; although the findings can still be generalised to schools with similar contexts.

## **Results and Discussion**

The study reported in this article aimed at assessing the compliance level of rural Primary schools to the Free Basic Education (FBE) Policy guidelines in Monze District of the Southern Province of Zambia. More specifically, the study investigated the extent to which Primary schools in rural areas complied with the Free Education Policy guidelines in the Ministry of Education; the reasons for non-compliance of rural primary schools with the Free Basic Education Policy guidelines; and the consequences of non-compliance with the Free Basic Education guidelines on rural primary schools. These themes have been presented and discussed in line with the research questions that framed them.

### ***To what extent do Primary schools in rural areas comply with the Free Education Policy guidelines in the Ministry of Education circular of 2002?***

This study was conducted to assess the compliance level of rural Primary schools to the Free Basic Education (FBE) Policy guidelines in Monze District of the Southern Province of Zambia. We begin by reflecting on the participants' account of their knowledge of Free Basic Education Policy guidelines, in order to contextualize their compliance levels. In responding to the question regarding the extent to which Primary schools in rural areas were aware of the Free Basic Education Policy guidelines contained in the Ministry of Education Circular (ME/71/126 No.3) of 2002., the results from head teachers and parents/guardians

revealed that of the five guidelines schools were only aware of three, namely that school uniform was not compulsory; enrolment of pupils was unconditional; and that pupils in Grade 1 to 7 did not have to pay any fees. However, schools were not aware of the guidelines that stated that ‘no pupil should be denied enrolment or excluded from school for failure to contribute to PTA activities and that ‘teachers should note that remedial teaching is part of their professional responsibility and should therefore not charge children for extra tuition undertaken within the school’. The surveyed schools had a general knowledge about what free basic education entailed but did not know the exact guidelines contained in the government circular. It is however important to state that despite not having the circular, dissemination of information concerning implementation of the FBE policy was being done as the surveyed schools used PTA meetings and school assemblies to enlighten parents/guardians and pupils. In this context, these findings were similar to those of Mulenga (2010) whose study revealed that in Lusaka district dissemination of information about Free Basic Education policy was done through Television, Radio and PTA meetings. Indeed, communication is key to the promotion of inclusive education. In order to implement, people ought to know.

However, the findings indicate that despite been aware that pupils in Grade 1 to 7 did not have to pay any fees, the surveyed schools failed to comply with this Guideline and instead levied fees on pupils. Pupils paid fees ranging from K25 (US\$2.50) to K50 (US\$5) per year for building, stationary, textbooks, chalk, PTA projects, sporting activities, and social welfare. Parents/guardians that were unable to pay cash but were able to take items such as maize, grass, and other agricultural products were allowed to do so as long as the value of the items was equivalent in amount to the required fees. Some parents/guardians would also offer labour according to the needs of the school in order to compensate for failure to pay their children’s school fees. While enrolment was not linked to payment in monetary or other kinds, once enrolled, pupils were levied fees, contrary to the guidelines. This finding was similar to that of Muchimba (2010) whose study revealed that rural basic schools charged pupils some fees for the running of schools. The finding was further consistent with that cited by Arendse (2011) who stated that in South Africa, Basic education was not free as learners were denied Basic education because of the levying of school fees and other educational charges. Additionally, the findings were in line with those reported in the World Bank Report by Kattan (2006) who revealed that even after the Education for All pronouncements and the Millennium Development Goals (MDGs), user fees were common in fifty-nine out of the ninety-three countries surveyed, and that national policy in those countries did not address the elimination of fees. The PTA/community fees were widely imposed in most of the surveyed countries with failure to pay often leading to suspension or expulsion of the learners. Clearly, this runs contrary to the provisions of the SDG4 which advocates for inclusion of all irrespective of their status in society.

On the guideline that school uniform was not compulsory, rural schools in the sample did not make school uniform compulsory as revealed by the findings of this

study. The study found that indeed schools allowed pupils to learn even when they were not adorned in school uniform, and further that parents/guardians who could afford to, were allowed to purchase uniforms from wherever they desired to. The cost of uniforms ranged from K35 to K250. However, parents/guardians preferred their children/dependents to be in school uniform they considered it important for the welfare of learners, for promoting a sense of unity among learners and also promoted smartness in their children and further concealed socio-economic disparities among learners that would otherwise become apparent if pupils wore their civilian clothes to school. It was therefore necessary that every pupil wore a uniform to school. In other words, there was an element of social pressure which drove parents/guardians to buy uniforms for their children. By implication, those who could not afford suffered some form of social stigma associated with want. Because of the above reasons, parents/guardians ensured that their children/dependents had a uniform. However, all this did not mean that uniform was compulsory. Pupils were allowed to learn even though they did not have uniforms. However, the finding above was contrary to the findings of Mwansa (2004) who established that despite the guidelines of the FBE policy in Zambia, uniforms were still compulsory in some schools. In agreement with Mwansa (2004), Mulenga (2010) found that some Basic schools in Lusaka district in Zambia still had the uniform as a compulsory requirement and was in some cases commercialized whereby parents were compelled to buy them from one source recommended by the schools, which tended to be more expensive than other sources. That was strenuous on parents and led to poor retention of learners in those schools. This indicates that head teachers interpreted the policy differently due to the ambiguity in the guideline that indicated that schools could continue with the uniform requirement as long as they did not commercialize uniform acquisition by turning it into a fundraising venture.

In line with the fifth FBE policy guideline, the study established that primary schools in rural areas of the district under study complied with the guideline that stated that teachers should note that remedial teaching is part of their professional responsibility and should therefore not charge children for extra tuition undertaken within the school premises. The study found that teachers in the surveyed schools did not require pupils to pay for the extra lessons they gave to their pupils in various subjects such as Mathematics, Science, Social Studies so as to appropriately prepare the pupils for examinations. They offered them for free because they wanted to prepare pupils for final examinations. This practice by the teachers to offer free lessons to pupils was highly commendable considering that teachers in Zambia, like elsewhere, have a low status which is linked to low morale and de-motivation and ultimately low output (Banja and Chakulimba, 2013). On their part, pupils were attending those extra lessons since they understood their importance. Such extra lessons were conducted after school hours during the week and also during school holidays. Extra lessons are a step in improving academic performance among learners in Zambia. This shows that with the right attitudes, inclusive education can be achieved.



The study further revealed that pupils' enrolment was not based on any material contribution as that would disadvantage the vulnerable. It has to be stated that before FBE, each household with a pupil was responsible for parts of education costs such as uniforms, and PTA fees. After the introduction of this policy, PTA fees in Grades 1-7 were abolished essentially; uniforms became no longer a duty, and stationery needed at school such as pencils and notebooks were provided (World Bank, 2006). Enrolment rates have been increasing at basic school level in Zambia since the introduction and implementation of the FBE policy. The Basic Education Sector Analysis Report (2012) states that enrolment in the basic education stage increased from 2.5 million in 2004 to 3.5 million in 2010. There was further an aggregate increase in enrolment 7,316 from 2015 (4, 018,064) to 4,025,380 in 2016 (Ministry of Education, 2016). These figures agree with UNDP figures on increased enrolment of primary school learners. It must be noted however, that the abolishment of fees was not really planned for as many countries were unable to fully finance the education sector.

These findings show that primary schools in rural areas of Mazabuka district complied with the policy guideline that says enrolment of pupils shall be unconditional and should not be linked to contributions of any items. Most parents/guardians and head teachers indicated that offer of a school place was not tied to contribution of any items to the school or the PTA and therefore no pupils were denied enrolment nor were they excluded from school because of their inability to contribute towards PTA activities. The explanation may be that this was facilitated by the PTA itself which was comprised of parents and teachers who made decisions based on what was manageable to their pupils and children/dependents. This position agrees with BC Inclusive Education (<https://inclusionbc.org/about/>) and the tenets of the SDGs number 4 on education that through inclusive education all learners should be accorded equitable opportunities to learn and participate in all aspects of school life.

### ***What are the reasons for non-compliance of rural primary schools with the Free Basic Education Policy guidelines?***

Our next task was to find out the reasons that led to non-compliance of rural schools to the Free Basic Education Policy Guidelines. There are a number of challenges that nations face directly stemming from the introduction of free basic education. Governments worldwide are in a dilemma regarding the provision of free education versus quality education. As indicated already, the study found that primary schools in rural areas failed to comply with the FBE policy guideline that forbids levying of fees. This failure was attributed to inadequate funding from government.

The head teachers brought out the challenge of inadequate funding with its attendant offshoots of inadequate provision of educational materials, inadequate teachers' houses, inadequate classrooms and desks, over-enrolment, and lack of proper water and sanitation. This was because the financial stance of government is very poor, therefore remission of funds to schools is a challenge that prompts

primary schools to introduce fees. Governments have tried to abolish user fees and yet there is still insufficient funding to the education sector to meet the overwhelming needs in schools.

As with any social service, the accessibility and quality of education are dependent on adequate financing. It is also important to note that funds were not only inadequate but also delayed in being remitted to the schools. This had serious ramifications for learners as schools were compelled to request for financial contributions from learners. It also resulted into delay in purchasing of teaching and learning materials such as textbooks, chalk, desks, pens and stationery. Schools received government funds once every two years without arrears for the year missed, and even when those funds were received, they would not meet all the school costs thereby inhibiting smooth operation of schools. This agrees with the findings of Bus (2013) who states that Zambia has encountered the challenge of how to ensure that its primary education is of a quality high enough for pupils to progress through secondary education and higher recurrent budgets for the provision of books, lab and computer equipment. Further, the findings of this study were consistent with those cited by Phiri (2015) and Mulenga (2010) who found that delays in receiving funds affected the operation of schools. As a consequence, the PTA in all the surveyed schools was actively taking part in running and organising school projects. The association worked to raise funds and enable the schools to take part in sports, school clubs, and to ran projects such as production units as well as develop infrastructure. In terms of infrastructure development, most schools had developmental projects like building of teachers' houses, classroom blocks, desks, toilets, drilling of bore holes and renovation of toilets. However, parents/guardians revealed that to supplement funding for such activities, pupils were required to contribute money appropriately known as PTA levy in addition to double or three learning sessions as well as making temporary desks. In addition, parents/guardians needed to meet educational costs of their children/dependents through costs for such materials as books, uniforms, school bags, school shoes, pencils and pens that parents/guardians had to meet.

Based on the foregoing, schools are still forced to demand for certain fees from pupils for operational purposes like purchasing teaching and learning materials and also for infrastructural development. This meant that education was not absolutely free. The persistence of some kind of fees and other private costs of schooling remains a worldwide phenomenon, even when countries have officially and legally abolished fees. The issue to be settled is whether or not the schools really demand such fees in pursuit of the achievement of universal education or for self-preservation.

As indicated above, this study clearly shows that when governments do not provide requirements for schools to obtain what they need to run effectively and efficiently, they resort to levying learners in contravention of standing guidelines. This finding agrees with the findings of a study done in Ghana which was prepared by Results for Development Institute (2015) for the UBS Optimus Foundation also revealed that in peri-urban Ghana, households met extra school charges for

food, uniforms/sports clothes, textbooks, exam fees, and PTAs. In the survey, school heads cited the insufficiency of their capitation grants as one reason for these charges.

The lack of adequate funding affected the implementation of Free Basic Education policies in the country. The good intentions of schools to include every child in the education endeavour as demonstrated by their adherence to the guidelines that school uniform was not compulsory and that enrolment of pupils was unconditional were overtaken by the sheer necessity to keep schools equipped with all necessary materials.

These findings confirmed the findings of many scholars and organisations on the topic (UNESCO, 2016; Mobela, 2016; Museba, 2012; Serem & Ronoh, 2012; Muchimba, 2010). Since government did not adequately provide funds for capital investment, parents/guardians were obliged to take up this responsibility. In addition to lack of capital funding, schools made recurrent demands on their learners. Some schools were asking for payments from pupils because government funds to schools were either not forthcoming or inadequate. As a result, schools joined hands with parents and communities to raise funds for projects and important activities such as sports and clubs (Museba, 2012). This is in line with the principles of inclusive education whereby parents are welcomed as partners in their child's education in the local school community. The findings support the idea that educators' attitudes towards inclusion are important in developing inclusive school systems and that inclusive education is best understood as a multidimensional concept that, at the practical level, is highly context-dependent (Inclusion BC, n.d.). A practice that was inclusive and accommodating of all pupils irrespective of their financial status could offer the necessary support to the needy pupil. In this case, just like schools have the responsibility to encourage parental involvement in the school life of their child, parents were seen as valuable partners with the responsibility to be involved in their child's education. In agreement, Inclusion BC propagates that 'all students are welcomed and valued for who they are. All students have equitable access to learning, with accommodations and support as required to overcome systemic barriers and discrimination. The public school system is the foundation for inclusive education. All students have the right to receive a public education in the regular classroom. Students' participation in all aspects of school life is vital to a rich education experience. However, even though it is clear that inclusive education enhances social justice, the pursuit of inclusion in practice, especially the guarantee of good and effective education for all, was seen as problematic due to barriers to access (<https://inclusionbc.org/our-resources/what-is-inclusive-education-2/>).

### ***What are the consequences of non-compliance with the Free Basic Education guidelines on rural primary schools?***

To investigate the consequences of non-compliance of rural primary schools to the FBE policy guidelines, we again turn to the head teachers who all indicated that the major consequence was increase in dropout rates among pupils because

some parents pulled their children out of school on account of failure to pay the fees. During the interviews, as mentioned earlier, parents/guardians revealed that many children dropped out of school because schools were still charging fees thereby inhibiting them from accessing education which was meant to be free. Non-compliance therefore affected pupil retention in schools. It is also important to point out that despite school fees being arrived at by both the parents and school managements, some parents/guardians could not afford to pay. Dropout rates increased because some parents stopped their children from attending school, arguing that there were a number of costs they needed to bare aside from the school fees. Some parents opted to marry off their children rather than suffer the costs of sending their children to school. From another point of view, many households did not encourage children to go to school because schools were still charging fees which meant that they were, to some extent, inhibited from accessing education because of financial constraints even when education was said to be free. This finding is in tandem with what Saroso and Yardley (2005) in Museba (2012) stated that parents in Indonesia, China, the Solomon Islands and many African countries like Kenya, Malawi, Zambia, Uganda and Tanzania cited user fees as a major obstacle to enrolling their children in school. It is clear that the challenge of failing to provide 'free' education is indeed a major obstacle to the attainment of universal primary education. This problem persists because full elimination of fees in the education sector remains a challenge which has adversely constrained the strides towards inclusivity in the provision of primary education. This further agrees with the USAID Report of 2010, which reported that school costs were a barrier that prevented some parents from enrolling or keeping their children in school.

As a result of the non-compliance discussed above, examination results were negatively affected, which was caused in part by pupil absenteeism, as pupils stayed away from school whenever they were unable to pay the school fees. Some pupils were affected by being called out regularly to explain their non-payment of school fees. In this respect, as mentioned in the previous section, some opted to stay away from school altogether. Clearly, the findings suggest that the demand for school and related fees tended to inconvenience and demotivate learners who had to find means of paying fees considering that some were too vulnerable to raise the fees demanded by their schools. It further demotivated them as they could not attend certain sporting and school activities if the activities demanded some contribution. This is consistent with the findings of Mulenga (2010), who established that user fees for PTA as well as certain amounts for textbooks and other learning materials were still demanded from pupils; adding that this affects enrolment and retention of learners as some did not have books to write in and other school requirements. This affected academic performance and defeated the principle of inclusive education.

Much as some parents genuinely failed to pay school fees, it must be noted from the findings that some parents' view of free education affected their commitment to pay fees. Parents believed that they did not need to contribute anything towards their children's education since government policy stated that education should

be free at Primary level. These findings were in line with those of Serem & Ronoh (2012) on the challenges faced in implementing free primary education for pastoralists in Kenya where there was general misconception about the meaning of 'Free Education' with parents taking the view that they were no longer required to participate in school activities.

Notwithstanding the progress made towards UPE, an estimated 195,582 Zambian children were out of school in 2013 (World Bank, 2015). Without surprise, the dropout rates were significantly higher among pupils from poorer families. With these figures, despite having the policy, it can be noted as Muchimba (2010) emphasises, that Basic education in Zambia was not yet 'free' as schools still required certain fees from pupils. It is, however, government's responsibility to take care of education costs at basic school level, and this is what the FBE policy indicates.

Overall, as shown by this and other studies, the implementation of the 'free' education policy has been problematic and failure to comply with some of the FBE policy guidelines has had huge consequences on attempts to achieve universal education for all. The failure to comply to this policy and its implementation guidelines affects access to free, quality and compulsory education which are advocated by the SDG 4.

## **Conclusion and recommendations**

The focus of this article has been to assess the compliance level of rural Primary schools to the Free Basic Education (FBE) Policy guidelines in Zambia. In sum our study results are threefold. First, the data largely confirmed the gap between policy pronouncements at national level and implementation at grassroots' level which remains a challenge in Zambian schools. In light of this, the study concluded that awareness of policy on its own was not a guarantee of compliance to policy directives from government. Second, our findings show that, government was resource-constrained, resulting into inadequate funding to rural primary schools thereby affecting the implementation of the FBE as schools were compelled to demand school and other fees from pupils. Third, the requirement for learners to pay school fees affected access to education of many rural children. Compliance to the FBE policy has influence on the academic welfare of pupils; and without education, many children are left on the wayside.

Based on the conclusions, this study recommends that Government should resolve funding constraints and increase funding for education, and make disbursements regular in order to promote compliance to the FBE policy in schools. Government and non-governmental organizations should help by providing adequate educational materials such as textbooks, chalk and other books in order to avoid levying of User fees from learners. Infrastructure in rural primary schools should be improved by the government and expanded so that schools do not levy fees to build infrastructure. Additionally, government should increase its capacity to monitor compliance to the FBE policy. All this will enhance equality and inclusiveness in education at the primary school level. It is crucial therefore

that Government takes stoke of the huge implications that come with failure to provide free education to all eligible children.

## References

- Arendse, L. (2011). The obligation to provide free basic education in South Africa: an international law perspective. *Potchefstroom Electronic Journal*, 14 (6), 97-127.
- Banja, M.K. and Chakulimba, O. C. (2013). Status of primary school teachers and its effect on the delivery of primary education in Zambia. *Zambia Journal of Teacher Professional Growth*. 1(2) 84-96
- Buus, C. H. (2013). *Millennium Development Goals Progress Report Zambia*. Lusaka: UNDP
- Bwalya, E.S. (2012). The provision of universal access to basic education in Zambia: an evaluation of the performance of the national policy on education in Chongwe and Kafue Districts. Master's dissertation, University of Zambia.
- Chibwe, C. (2018). 'Zambia's experiences with SDG 4 monitoring: Challenges and needs.
- Paper presented at the 5<sup>th</sup> Technical Cooperation Group 5 Conference on the indicators for SDG 4, 15-16 November, Mexico City, Mexico. Retrieved from the World Wide Web <http://tcg.uis.unesco.org/wp-content/uploads/sites/4/2019/01/10-Zambian-TCG5-PPT-EN.pdf> Accessed 31/07/2020
- Curriculum Development Centre (2013). *The Zambia Education Curriculum Framework 2013*. Lusaka: CDC
- Kattan, R.J (2006). *Implementation of Free Basic Education. Education Working Paper Series, No.7*. World Bank, Washington DC-USA
- Kombo, D.K. and Tromp, D.L.A (2009). *Proposal and Thesis Writing an Introduction*. Paris: Oxford University Press.
- Ministry of Education (2005) *Educational Statistical Bulletin*. Government of the Republic of Zambia. Lusaka.
- Ministry of Education (2005). *Principles of Education Boards, Governance and Management (Manual)*, Lusaka.
- Ministry of Education, M.E/71/126, Circular No.3, 15<sup>th</sup> March 2002.
- Mobela, C. (2016). Impact of Free Basic Education: a case study of government schools in Kabwe Urban District. *International Journal of Multidisciplinary Research and Development*. Vol.3. No. 9.
- Muchimba, D. (2010). The impact of social and economic factors on access to free education in the basic schools of Zambia: the case of Monze District. Master's dissertation, University of Zambia.
- Mulenga, A.M (2010). 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. Master's dissertation, University of Zambia.
- Museba, R.E (2012). Challenges in the implementation of Free Basic Education

- Policy: a survey of selected basic schools of Solwezi District. Master's dissertation, University of Zambia, Lusaka.
- Mwansa, D.M. (2004). *Growth and Impact on Girls Education 1996-2004*. FAWEZA, Lusaka.
- Phiri, G.G. (2015). The impact of Free Primary Education in Zambia: a case of Chipata District. Master's dissertation. Information and Communication University.
- Results for Development Institute (2015) Policy Brief: Implications of Education Fees and Their Effect on Household Decisions in Ghana. Retrieved from the World Wide Web [http://www.r4d.org/wp-content/uploads/Ghana-HH-Survey-Policy-Brief.pdf?\\_ga=2.100655646.1468866046.1598782998-1646357830.1598782998](http://www.r4d.org/wp-content/uploads/Ghana-HH-Survey-Policy-Brief.pdf?_ga=2.100655646.1468866046.1598782998-1646357830.1598782998) Accessed 30/08/2020.
- Serem, D. & Ronoh, R.K. (2012). *Challenges Faced in the Implementation of Free Primary Education for Pastoralists in Kenya. Problems of Education in the 21st Century* Vol. 41.
- UNESCO (2016). *Zambia Education Policy Review: Paving the way for SDG 4 Education 2030*.
- UNESCO (2009). *Education for All: Country Reports*. Paris, UNESCO
- UNICEF (2007). *A Human Rights-Based Approach to Education: A framework for the realisation of children's right to education and rights within education*.
- USAID (1948). . *United Nations' Universal Declaration of Human Rights*, Paris: Oaks, CA: SAGE publications, Ltd.
- World Bank (2015) *Education Global Practice: The Rise of Results-Based Financing in Education; No. 98264*
- World Bank (2005). *World Development Report: Investment, Climate, Growth and Poverty*. World Bank Publications. New York.
- World Bank (2005). *World Development Report: Investment, Climate, Growth and Poverty*. World Bank Publications. New York Retrieved from the World Wide Web <https://inclusionbc.org/our-resources/what-is-inclusive-education-2/> Accessed 31/07/2020.
- UNPD (2018). Retrieved from the World Wide Web <https://www.zm.undp.org/content/zambia/en/home/sustainable-development-goals/goal-4-quality-education.html>.
- Sustainable Development Goals Retrieved from the World Wide Web <https://www.zm.undp.org/content/zambia/en/home/sustainable-development-goals/background/> Accessed 31/07/2020
- Global Campaign for Education (2020). Retrieved from the World Wide Web [https://www.campaignforeducation.org/en/who-we-are/the-international-education-framework-2/the-sustainable-development-goal-4/sdg4s-10-targets/?gclid=Cj0KCQjwgo\\_5BRDuARIsADDEntQ\\_3edJE2yGUOyuv3jPOGMVx9PCfyhrclUXEqX7GwULVwRRXZtWHIaAlrnEALw\\_wcB](https://www.campaignforeducation.org/en/who-we-are/the-international-education-framework-2/the-sustainable-development-goal-4/sdg4s-10-targets/?gclid=Cj0KCQjwgo_5BRDuARIsADDEntQ_3edJE2yGUOyuv3jPOGMVx9PCfyhrclUXEqX7GwULVwRRXZtWHIaAlrnEALw_wcB) Accessed 31/07/2020.

*UNESCO's Education 2030 , Incheon Declaration and Framework for Action* for the implementation of Sustainable Development Goal 4. Retrieved from the World Wide Web <https://www.campaignforeducation.org/en/who-we-are/the-international-education-framework-2/the-sustainable-development-goal-4/> Accessed 31/07/2020.

Retrieved from the World Wide Web <https://www.zm.undp.org/content/zambia/en/home/sustainable-development-goals.html> Accessed 31/07.2020.

Retrieved from the World Wide Web <https://www.zm.undp.org/content/zambia/en/home/sustainable-development-goals/goal-4-quality-education.html#targets> Accessed 31/07/2020.

Retrieved from the World Wide Web <https://inclusionbc.org/our-resources/what-is-inclusive-education-2/> Accessed 31/07/2020.