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Chapter 4

Regaining momentum towards UPE in Zambia

The current context

Introduction

Zambia gained independence from British colonial rule in 1964. In that year, the Gross Enrolment Rate (GER) in primary schools was estimated at about 58 per cent. Between then and 2004, 40 years, the population grew by a factor of three from 3.7 to11.5 million people, while enrolments in the country's primary schools grew by a factor of 5.9, from 378,417 to 2,251,000 pupils. By 2004 then, the estimated GER had in fact reached 99.9 per cent with a gender parity index (GPI) of 0.96 – a more than creditable achievement.

Moreover, in between those two dates something even more remarkable had occurred. By 1983 – within 10 years of independence – the GER had risen to 100 per cent, 105 per cent for boys, 95 per cent for girls[1]. Clearly, there had been a momentous achievement. Some data from a 1984 report will serve as a summary of the remarkable growth of enrolments and transitions during those early years of independence.

Primary enrolment: annual rate of increase, 1964–81 at selected grades (%)

	Grade 1	Grade 5
1964–70	11.8	20.7
1970–76	3.05	6.3
1976–81	3.3	4.0

Source: Coombe and Lauvas. 1984. p. 9

However, 1983 saw the peak of success in maintaining progress in terms of both absolute figures and ratios. Thereafter, although enrolments continued to grow, they grew more slowly than the population of school-age children. By 1999, the GER had declined to 75 per cent. The gap between population and enrolment growth grew so large that the World Bank's Country Assistance Strategy paper of 2004 observed that schooling levels were higher among the 40–45 year old group than among the 20–25 year olds. (See Table 4.1. for the statistics 1964–2002).

In this chapter, we will explore the factors that help explain why Zambia could not maintain the nearly two decades of success; and why, after another nearly two decades, the country seems to have resumed a successful path. First, however, it will be helpful to sketch the context in which the country has had to operate.

Table 4.1. Growth of total primary school enrolments, Zambia 1964–2002

Year	Total primary enrolment	Percentage increase
1964	378,417	
1965	410,093	8.4
1966	473,432	15.4
1967	539,352	13.9
1968	608,893	12.9
1969	661,281	22.6
1970	694,670	5.0
1971	729,801	5.1
1972	777,873	6.6
1973	810,234	4.2
1974	858,191	5.9
1975	872,392	1.6
1976	907,867	4.1
1977	936,816	3.2
1978	964,475	2.9
1979	996,597	3.3
1980	1,041,938	4.5
1981	1,073,314	3.01
1982	1,120,935	4.4
1983	1,195,274	6.6
1984	1,261,587	5.5
1985	1,349,212	6.9
1986	1,378,022	2.1
1987	1,391,561	0.9
1988	1,426,135	2.5
1991	1,461,206	2.5 [over 1988]
1998	1,557,000	6.6 [over 1991]
1999	1,555,112	−1.0
2000	1,590,000	2.2
2001	1,626,000	4.6
2002	1,732,000	6.5
2004	2,251,000	29.9 [over 2002]

Land and people

To help explain educational development, it is important to remark on two facts. First, Zambia is a landlocked country, surrounded by no fewer than eight neighbours. Second, it covers a land area of 752, 614 sq. km. with an estimated population in 2007 of some 11.7 million people. The first fact has impacted education through the civil wars that raged at different times in five of its eight neighbours from 1960 onwards. It demanded preoccupying attention and the priority allocation of resources to national security.

The second fact involves a very low population density of about 15 persons per sq. km. As just over half the people live in the rural areas, the distribution is scattered, with the attendant implications for the distribution of primary schools and access to them.

More than 50 per cent of the population is below 15 years of age, a fact that implies that the government's goal of a Universal Basic Education (UBE) of nine years would require some three to four million places in primary and basic schools.

A fourth fact is that the estimated population growth rate during the 1960s was about 3.4 per cent (it has since declined to 1.7 per cent and to 1.2 per cent for the age group 0–4 years). To keep the supply of primary education growing at a pace that would both absorb the inherited backlog and simultaneously provide sufficient places for the rapidly increasing numbers of young children meant either that the share of primary education in the budget would have to be enlarged at around five per cent annually, or that the economy would have to grow at a higher pace than the population. As will be seen later, neither condition was satisfied.

Languages and culture

Zambia is home to 73 recognised languages. Their existence implies a multiplicity of traditions and cultural practices which could affect education. The government uses seven major ones for the purposes of public communication through the mass media and for the preservation of indigenous lore. However, it declared English as the official language of the country from the onset of independence and the medium of instruction in all grades of school. While this policy has almost certainly had negative effects on the learning of many children, especially on those from rural and poor families, it has made a significant contribution towards fostering a sense of national unity. Since 1996, however, a revised policy has begun to mitigate those negative effects by using a Zambian language as the medium of instruction for the first two grades, changing progressively to English so that English becomes the medium by Grade 5.

Zambia is fortunate in having no population groups whose way of life or religion makes them resistant to schooling in principle. On the other hand, some portion of relatively low daily attendance ratios and higher than average rates of drop out in some rural areas could stem from local traditions and cultural practices, such as initiation and circumcision ceremonies for boys, or early marriages for girls.

Economy

At independence, the government's revenues came almost wholly from the country's copper mines and were sufficient for the country to be ranked as 'middle income'. The oil crises of the 1970s, the consequent world economic recession and the accompanying fall in copper prices saw the economy steadily decline. Twenty-five years of heavy government borrowing from abroad and the failure of successive stabilisation and structural adjustment programmes to stimulate and diversify the economy finally led to the 2000 World Bank estimate that 82 per cent of Zambians were living below the poverty line of US$1.00 a day.

In 1964, most waged and salaried employment was in the public sector and total waged employment accounted for about a quarter of the labour force. Most of the population made their livings through subsistence agriculture. The protracted economic decline coupled with continued population growth has meant that the proportion of people in subsistence agriculture has actually increased, as waged/ salaried employment in 2000 occupied only about ten per cent of the work force.

Since 2000, the economy has recovered somewhat and has been growing at a slightly faster pace than the population. The government's development budget, however, remains dependent on external donors and financiers, while the recent success in qualifying for debt relief under the HIPC[2] initiative has brought additional funds for investment in education and health. The recent global downturn may, of course, have an adverse effect.

School structure

In operational terms, Zambia currently has three levels of formal education. The first or basic level comprises nine years – Grades 1 to 9. Children are expected to enter Grade 1 at age seven and to reach Grade 9 at age 15. The basic level has three sub-levels. Grades 1 to 4 are termed 'lower basic', Grades 5 to 7 are termed 'middle basic', while Grades 8 and 9 are 'upper basic'[3]. The distinction persists because some schools, mainly in the rural areas, are still able to offer only the lower basic course. Transiting to more distant middle or upper basic schools means that some children, the majority girls, continue to drop out on completing Grades 4 and 7.

Those who do very well in Grade 7 have a chance of being selected for the traditional secondary schools, which offer the Junior Secondary Grades 8 and 9. The majority, who do less well in Grade 7, continue into Grades 8 and 9 of the upper basic course.

Although the Basic Schools and conventional secondary schools both offer Grades 8 and 9, the Ministry of Education acknowledges, 'Basic schools are normally the same schools that offered Grade 1–7 but have now been extended to offer Grade 8 and 9 in the same schooling environment with little improvements made to the school in terms of either appropriate infrastructure or facilities appropriate to that level or grade. Some of the Basic Schools have inadequate teaching materials and teaching staff. Basic Schools located in the rural areas have a high likelihood of their pupils failing to proceed or cope with the lessons in grade 10 to 12 classes'. (*Ministry of Education Strategic plan 2003–2007*). In effect, there are currently two tracks in junior secondary school, one superior to the other.

Zambia aspires in due time to provide a 9-year Universal Basic Education (UBE), but is for the moment focusing on UPE, which comprises Grades 1 to 7 only.

The second level of education is Senior Secondary, which comprises the final three Grades 10 to 12 and is subject to tuition fees. Pupils in Grade 9 of the Basic Schools are eligible to take the national exam that qualifies them for entry to Grade 10.

The third level is post-secondary or tertiary education and includes three universities and a number of technical institutes.

Many years of over-use of school buildings, through multiple sessions and large classes,

coupled with the near-absence of public funds for school maintenance and repairs, have left most schools in an unacceptably poor physical condition. Almost half the rural schools do not have their own source of safe drinking water, while urban schools have grown well beyond their planned size, but without any commensurate increase in sanitary facilities.

Since 1991, the liberalisation and privatisation of the economy has created an environment in which participants in educational provision now include the government, communities, enterprising individuals, religious organisations and secular non-governmental organisations (NGOs). There has been an increase in alternative provisions of basic schooling. The economically well-off have tended to enrol their children in private schools, while the less fortunate use the government system, where it is available, or, where it is not, have set up community schools.

In terms of actual provision, in 2004 there were 6,796 Basic Schools, of which 4,409 were government-run (64.9 per cent). There were 174 grant-aided schools, 143 church schools and 252 private schools. The known Community Schools were 1,388, which made them the second largest provider of basic education[4]. In addition, there were 430 unclassified schools and a number of Interactive Radio Instruction Centres (IRI).

According to UNESCO's Global Monitoring Report for 2007, some 380,000 children entered Grade 1 in 2004. This number represented 110.0 per cent of the estimated number of 7-year olds in the country [Gross Intake Ratio]. However, the children actually aged 7 years were a minority in this group, so that the Net Intake Ratio (NIR) amounted to only 39.0 per cent. On the other hand, the long-standing gender disparity in favour of boys was reversed by a small margin: the NIR for boys was only 38.0 per cent, while that for girls was 41.0 per cent, yielding a Gender Parity Index (GPI) of 1.06.

As indicated earlier, the Gross Enrolment Ratio (GER) in 2004 stood at 99.0 per cent, with 101.0 per cent for the boys and 97.0 per cent for the girls, a GPI of 0.96. However, the GPI had improved to the desired 1.0 for the Net Enrolment Ratio (NER), which stood at 80.0 per cent for both boys and girls. The ratios implied that some 435,000 children of primary school age were not in school in 2004, 51 per cent boys and 49 per cent girls.

In terms of efficiency, the percentage of repeaters across all seven grades in 2004 was estimated at a moderate 6.9 per cent. The survival rate to Grade 5 in 2003 was thought to be 98.5 per cent, and to Grade 7, 66.2 per cent.

As regards the supply of primary and basic teachers, approximately 5,000 new teachers graduate per year from the 14 Colleges of Education operated by the Ministry of Education. Of these, 12 train teachers for Grades 1–7 and two train for Grades 8 and 9. In 2004, total enrolment in the 12 primary colleges was 8,762, an increase of over 50 per cent from 2003. Females constituted 51.4 per cent of the student body.

Since 2003, the colleges have been following the Zambia Teachers Education Course (ZATEC) at basic level, designed to meet the demand for teachers. Instead of the traditional two-year residential programme at college, ZATEC students receive one-year intensive training in college and spend their second year in school teaching and at the same time studying courses taught by distance methods.

The pupil-teacher ratio in basic schools is reckoned to average 43:1. However, it is possible that this comparatively favourable ratio arises from calculating it on the basis of two shifts per class per day. If that is so, the actual ratio would be in the region of 80:1, with one teacher serving two classes each of some 40 pupils. All serving teachers are classed as fully trained and qualified, with 48 per cent of them being female.

Quality in terms of learning attainments is also reported to be improving, partly due to the introduction in 1999 of the Zambia Primary Reading Programme. An evaluation in 2002 found that reading levels among pupils of Grades 1 and 2 were dramatically above their expected grades in Zambian languages and at the appropriate grades in English. There are hopes that, as more teachers become more proficient in the methods of the programme, national assessments will find continuously rising outcomes.

The gradually improving economic situation, the benefit from qualifying for debt relief and the cooperation from more than a dozen international partners have helped the country to begin to ameliorate the long standing shortage of textbooks and instructional materials in the primary schools[5].

In short, the current reported status of primary/basic education permits strong hopes that very soon every child in Zambia will be able to start and complete at least seven years of schooling with sufficient attainments in the basic skills of reading, writing and written calculation in the official national language to enable a decent life well above the poverty line.

The next section will trace the progress that Zambia had made in the first two decades of independence, but which faltered during the two subsequent decades.

Outline history of UPE efforts 1964–2004

The primary system at Independence

The goal of UPE/UPC is not new to Zambia. Its pre-independence leaders took part in UNESCO's Addis Ababa educational conference of 1961, which promised education for all African children by 1980. On taking power in 1964, the new government followed up that promise by stating, 'We are pledged to the pursuance of the policy of compulsory education and free tuition for all children up to Form II'. At that time, the pledge covered ten years of schooling, eight for the complete primary course, plus two years of secondary school. The existence of the pledge signalled two important facts. First, the government recognised the importance of a scholastic education for every child. Second, it aimed, even in 1964, not at Universal Primary Education, but at an extended Universal Basic Education. As first steps, in 1966 it consolidated the eight-year primary course into seven years of full-time education starting at age seven and ending at age fourteen and its First National Development Plan 1966–70 aimed to provide school places for all seven year-olds by 1970.

Primary education in 1964 comprised an initial two years of half-day school in what were termed Sub-A and Sub-B for five and six-year old children, followed by four years in what were called Standards 1, 2, 3 and 4 for children aged seven to ten years. These six years constituted the 'lower primary' course, which followed the UN belief that it would enable

most pupils to master the arts of reading, writing and arithmetic sufficiently to retain and develop for the rest of their lives. They were, in effect, the basic education of the time and even before independence were tuition-free[6], with texts and instructional materials supplied by the state. However, they were not compulsory. Indeed, as the available schools could accommodate less than 60 per cent of the eligible age group, immediate compulsory schooling was simply not feasible.

The assumption of sufficient and permanent literacy by the end of the first six years of primary education (two half-time, four full-time) was the basis of two policies for the remaining two years of the course. As resources were always limited and as additional education was assumed to be not strictly necessary for a still largely agrarian population, the provision of places for the final two years of primary school, Standards 5 and 6[7], were allowed to lag behind lower primary: fewer places were available in Standard 5 than in Standard 4. In effect, selection and competition entered the education system very early. The second policy required those who chose to continue their education to contribute to its costs through tuition fees. There was thus selection both by academic ability and by ability to pay.

In 1964, the national transition rate from Standard 4 to 5 was approximately 75 per cent. The new government planned that from 1966 it should be 100 per cent for all urban areas and 75 per cent for the rural regions. The government also significantly reduced the financial costs by immediately abolishing tuition fees for the upper primary Grades 5–7.

A second selection point came at the end of the three-year upper primary course: on the basis of attainments in a national examination, children were selected for the lower secondary course of Forms 1 and 2. In 1964, only 4,639 of the approximately 13,000 (35.7 per cent) pupils in Standard 6 in 1963 succeeded in gaining entrance to Form I. The new government planned to increase access to secondary school in step with expanding primary enrolments and graduations, so that by 1974, the numbers of successful entrants to Form 1 had risen to 19,254 – a fourfold increase in ten years.

The selection for junior secondary was followed two years later by selection for senior secondary or Forms III, IV and V. Then came selection for Form VI (pre-university), and after that selection for a university, which had to be abroad, as the country had no university of its own until shortly after independence. In 1960, the chances that a child entering Grade 1 would enter Form VI were 1 in 1,000. Not surprisingly, at independence, only just over 100 Zambian nationals held university degrees.

Ownership

As in many former colonial territories, school education for the indigenous peoples in Zambia had begun not with the government, but with Christian missionaries[8]. Although each church ran its own network of schools and was responsible for staffing, it benefited from the government's subsidies through teachers' salaries and teaching materials. There were also some private schools. By 1964, the majority of lower primary schools in the rural areas were built and maintained by their communities with some help and supervision from their local governments. In the urban areas, municipal authorities were respon-

sible for building and running the schools. The Ministry of Education supplied teachers for both sets of schools and supervised their quality. The less numerous upper primary schools of Standards 5 and 6 were usually run either by a mission or the government.

By the early 1990s, the inability of the government to sustain the supply of schools began to force communities into building and running their own schools once more. Initiatives arose all over the country, not just in the urban areas. Known as Community Schools, these establishments are community based, owned and managed. They strive to meet the primary or basic education needs of pupils who cannot enter government schools. Representatives of the initiating community organise and manage them.

Alongside the Community Schools, some Interactive Radio Instruction Centres (IRI) have arisen. They are innovative distance learning programmes that use radio for instruction, facilitated by a mentor. The target pupils are similar to those of the Community Schools. Indeed, some of the Community Schools follow the IRI as a methodology for teaching.

Both Community Schools and IRI Centres demonstrate the desire of communities to ensure an education for their children. The children who access these schools:

- are over-aged and cannot be enrolled by government schools;
- cannot afford school costs, even though government schools are within reach;
- are in peripheral, mostly rural, areas with no other school in the vicinity;
- care for aspects of education, e.g. issues of faith, which the government system does not;
- feel that the frequent and prolonged strikes by teachers in government schools make it impossible to obtain an education of adequate quality.

Typically, these schools do not charge fees and do not require their pupils to wear uniforms or even shoes. Teachers in Community Schools and mentors in the IRI Centres are mostly volunteer young women and men with Grade 9 or Grade 12 backgrounds from within the community. Funding for the schools is provided by a number of international organisations, NGOs, church organisations, and community self-help initiatives.

In 1995, UNICEF took a hand and imported advice on running 'non formal primary education' from the experience of BRAC[9] in Bangladesh. The growth of community schools has been phenomenal: in 1996, 55 schools were known to exist, whereas in 2006, more than 3,000 were estimated to be operating all over the country. The Ministry of Education now recognises Community Schools and is committed, when resources permit, to assist them in accordance with the Education Policy. (*ZCSS Strategic plan: 3*)

Currently then, there are four categories of basic schools: government, aided, private and community.

The primary curriculum

In 1964, the primary curriculum was widely regarded as irrelevant. The majority of families lived by subsistence farming, but the curriculum was geared to language, knowledge and skills more relevant to urban and government occupations. Shortly after independence, in the interests of promoting national unity and at the risk of undermining good

quality teaching and learning, English was made the language of instruction in all grades and the language policy was reinforced by posting primary school teachers to schools outside their own language areas, so that they had to insist on English.

The first effort at reform began in 1969 and ended in 1977 with the virtual rejection of efforts to make the curriculum more relevant and practical. The only concessions were the formation of 'Production Units' to supply the schools' – and teachers' – needs for fresh food and a 'Practical Studies' project supported by the Finnish government.

The next major reform came in 1996 with the introduction of the new Zambia Primary Reading Programme mentioned in Section 1. It addressed the tension between the desirability of launching children into reading and writing through their mother tongue and the need for them to master the national official language, English. Highly encouraging results in the piloting led to the adoption of the programme in all basic schools in 2003.

Simultaneously, the Ministry of Education began a fresh effort to adjust the curriculum. It published the new 'Basic Education Curriculum for the Lower Basic and Middle Basic Grades 1–7'. The intent is to realign the curriculum to focus on elements of education that are cardinal for further learning notably the development of literacy, numeracy and personality. The curriculum also comprises five learning areas with curricula and content common to all schools: Literacy and Languages, Mathematics, Integrated Science, Creative and Technology Studies, and Social and Developmental Studies. A sixth learning area, Community Studies, will derive its curriculum and content from a school's local community and environment. The revised syllabuses for the six learning areas are outcome-based, learner-centred and oriented to continuous assessment.

Supplying schools, teachers and teaching materials

In the early years of independence, the need for new schools and classrooms was so large and urgent that the Ministry of Education formed its own building agency to deal with the work involved and to move at almost break-neck speed. To help accelerate the process, responsibility for identifying where schools were needed and for selecting sites was devolved to the provincial and district administrations.

So successful was this drive, despite local deviations, that within four years, the Ministry of Education felt able to claim that sufficient Grade 1 places were available for all seven year olds. The 1969 Census estimated that there were between 112,000–119,000 seven year-olds in Zambia, while Grade 1 enrolment numbered 125,000 and climbed to 127,131 in the following year, 1970. Indeed, it appeared that the number of places in all four grades of lower primary closely matched the 7–10 year age group[10]. Further, the primary school Grade 6/7 output had grown 'from a mere 13,000 in 1964 to 67,000 in 1970 – a magnificent expansion of opportunity'. (Coombe, 1970. para. 58.152)

On the other hand, despite the cheering news from the census and enrolments, the drive was showing signs of fatigue. In 1970, the Ministry managed to open only 27 new Grade 1 classes, sufficient to accommodate at most 1,500 additional pupils. But 5–6,000 new 7-year-olds needed places. Schools were already having to organise themselves in double

shifts to accommodate the press of new enrolments. Pupils in the lower primary classes of Grades 1 to 4 were being rationed to only three hours of tuition per day – a virtual reversion to the pre-independence half-day of Sub-A and Sub-B that now affected four years of schooling, not just the first two years. Concerns about the depressing effect on the effectiveness of learning were subordinated to the drive to accommodate as many children as could be squeezed into classrooms and into a school day.

Also, after a good start, the rate of progression from Grade 4 to Grade 5 in all the regions had fallen behind the target. (See Tables 4.2 and 4.3.) The government had planned that, by 1970, 82 per cent of Grade 4 leavers should be able to continue on to Grade 5. In 1968-69, the rate had been 82.3 per cent, but by 1972–73 had slipped to 75.5 per cent. The shortage of Grade 5 places was particularly acute in the rural regions. Whereas the capital city and the Copperbelt had progression rates of over 90 per cent in 1970, three of the rural regions had fallen below 60 per cent.

Table 4.2. Flow table of primary Grade 4–5 progression, by sex and region % 1968–69, Zambia

Region	68–69 Boys	68–69 Girls	68–69 Total
Copperbelt	101.5	96.0	98.8
Kabwe	83.0	78.5	81.1
Lusaka	100.4	94.9	97.8
Southern	81.6	73.0	77.7
Luapula	80.5	66.4	74.2
Northern	78.5	68.3	74.1
Eastern	73.7	61.6	68.7
N-West	89.6	80.5	86.2
Western	81.2	69.3	75.9
ZAMBIA	**85.8**	**77.9**	**82.3**

Source: Ministry of Education Annual Report for 1968–69, Lusaka, 1975

Table 4.3. Flow table of primary Grade 4–5 progression, by sex and region % 1972–73, Zambia

Region	72–73 Boys	72–73 Girls	72–73 Total
Copperbelt	100.7	98.0	99.4
Kabwe	76.7	73.2	75.1
Lusaka	102.5	97.6	100.1
Southern	80.7	77.2	79.1
Luapula	62.4	53.8	58.6
Northern	61.5	50.6	56.8
Eastern	64.7	47.4	57.4
N-West	82.6	71.9	78.2
Western	76.7	68.2	72.9
ZAMBIA	**78.3**	**72.1**	**75.5**

Source: Ministry of Education Annual Report for 1972–73

Similarly, the proportion of pupils continuing to Form 1 had declined from 41.5 per cent in 1966–67 to 23.4 per cent in 1969–70. The explanation was a combination of rising Grade 7 enrolments and a serious interruption in the building programme for secondary schools.

By the time of the First National Education Conference in late 1969, there seemed to be general acceptance that the country would be able to provide just seven years' primary education for all, and even that not immediately. The goal of nine years of universal basic education would have to be postponed. This acceptance received official recognition eight years later in the 1977 document on educational reform.

Despite the setback and disappointment, by 1977, the net enrolment ratio (NER) for the primary school age group in Grades 1–7 was reckoned at around 80 per cent (See Table 4.4). On the less positive side, the Ministry had to acknowledge that, whereas in 1970, there were sufficient Grade 1 places to accommodate all seven-year-olds, there were now places for only 85 per cent of the age group. And even there, the persisting backlog of children older than seven years taking up places in Grade 1 meant that less than 40 per cent of the actual seven-year-olds were in Grade 1. The population had been growing too fast for the Ministry to keep pace. A persistent downward trend in the economy and general restraint on public spending had necessitated a reduction in expenditures on new primary schools. In the urban areas, some municipalities reported that they were so short of places that one-third of their children could not go to school, even though several schools had gone beyond double shifts and introduced triple shifts in their efforts to accommodate public demand. Some schools reported pupil–teacher ratios as high as 80:1.[11]

Table 4.4. Grades 1–7 enrolment as proportion of estimated population aged 7–14 years Zambia, 1977

Region	Boys	Girls	Total
Copperbelt	72.8	71.3	72.0
Central	75.4	70.3	72.8
Southern	114.2	102.4	108.3
Luapula	107.6	89.8	98.8
Northern	100.3	77.5	89.0
Eastern	96.4	71.0	83.9
North-western	109.6	82.4	96.0
Western	92.7	81.3	87.1
Total Zambia	**89.5**	**77.8**	**83.7**

In the country as a whole, one-quarter of the pupils enrolled in Grade 4 could not find places in Grade 5. The progression rate from Grade 7 to secondary Form 1 in 1970 had been planned for 27 per cent: in 1977 it turned out to be less than 20 per cent.

If the supply of schools and classrooms had failed to keep pace with the growth of the population, the story for trained primary teachers was more cheering. The supply of teacher training institutions was continuously expanded and special training of just one year for lower primary teachers had been introduced, so that in 1977, 86.6 per cent of the teach-

ers were qualified, leaving about only one in seven less than fully trained. On the less cheering side were two aspects.

First, pupil–teacher ratios were deteriorating: in 1973, the ratio had climbed to an average in lower primary schools of 62.8 pupils for every teacher, with the urban Copperbelt reporting 67.7 and the rural Northern region 57.8. For the upper primary schools, the overall national ratio was a little better at 47.7 pupils for every teacher, but here with the rural Eastern region reporting the highest ratio at 50.5 pupils per teacher and the equally rural Western region reporting the lowest at 44 pupils per teacher.

Second, the majority of untrained teachers were to be found in rural schools, as their fully qualified colleagues with their families preferred urban postings. For instance, in 1973, whereas the capital, Lusaka, had 89 per cent of its primary teachers trained, the Northern region had only 69.3 per cent.

By 1981, the situation had worsened. The government was no longer able to keep the supply of new teachers abreast of growing numbers of the primary school age cohort. Larger numbers of untrained teachers were recruited to teach in primary schools. They received short initial training courses, but most proved unable to teach the Zambia Primary Course effectively. Quality naturally suffered. Migration to the urban areas exacerbated problems there, so that it was not uncommon in cities like Lusaka, Ndola and Kitwe to find classes of more than 50 pupils, and even in a few cases 70 pupils. Triple sessions, introduced as an emergency measure, began to look more and more permanent.

Nevertheless, in 1983 the Gross Enrolment Ratio had peaked at an overall 100 per cent: it clearly reflected a continuing high demand. Even so, in 1986 the Ministry of Education felt that the combination of stalling enrolments, the increasing backlog of children receiving no schooling, the continuing high rate of population growth – enrolments were growing at around two per cent against the population's rate of 3.2 per cent – and the bleakness of the economic outlook made it necessary to revise its targets. Increases in the number of classrooms and the number of teachers were not keeping pace with even the two per cent growth in enrolments, so that severe over-crowding and deterioration of facilities were on the rise, while pupil-teacher ratios and pupil-teacher time were worsening. In the face of all this, plus the scarcity of teaching materials, the teaching force had grown demoralised and lost its motivation to teach well.

In 1986 the Ministry therefore suggested that the realistic aim was to achieve UPE, Grades 1–7, by the year 2000, with only a minimal advance towards UBE or nine years of 'basic' education. More specifically, the Ministry planned to achieve by 2001 a net enrolment of 80 per cent for Grades 1–7, 35 per cent for Grades 8 and 9, and 25 per cent for Grades 10, 11 and 12 – secondary education[12].

Six years later in 1992 the Ministry of Education estimated that by 1996, 4,114 extra teachers and 3,657 extra classrooms would be needed just to maintain the status quo: it aimed to provide 4,400 teachers per year, but only 2,225 were produced. Indeed, instead of increases, statistics show a decrease in the number of teachers: in 1996, there were 40,488 teachers in public schools, in 1998 there were 38,840 and by 1999 there were 37,117, a drop of 8 per cent.

Several factors explained the high attrition rate: overcrowded classes, multi-grade classes in some rural schools (with no training to prepare for its challenges), poor conditions of service – by 1999 the starting salary of a primary school teacher was $660 per year, a sum less than the meals allowance paid to university students and 25 per cent below the government's own official poverty line for two adults and four children – a lack of housing particularly in rural areas and inadequate provisions for the security of single female teachers. In addition, the HIV/AIDS epidemic was taking its toll both in terms of sick leave and death, and in making teachers more unwilling to serve in areas with poor medical facilities.

If teachers were in short supply, the supplies of learning and teaching materials were even shorter. A report in 1990 observed, 'As Kelly's 1987 figures show, expenditure on teaching materials and general expenses accounted for 22 per cent of public recurrent expenditure on primary education in 1970, 15.6 per cent in 1975, 7.8 per cent in 1980 and 3.5 per cent in 1986 (of which zero was allocated for teaching materials in that year). Moreover, in real terms the expenditure per primary school student fell by 60 per cent between 1970 and 1986'. For some years now the institutions given responsibility of supplying school materials had not been able to keep up with the needs of the schools, while the distribution system also often broke down, so that large quantities of textbooks simply piled up in warehouses.

By 1989, only 44 per cent of rural 7–13 year-olds were actually attending school, a percentage only marginally better than when the government had taken over from the colonial regime 25 years earlier.

Organisation

As already mentioned, in 1964 a single Ministry of Education controlled all levels and types of education and training from primary through to university and vocational and technical schools. By 1980, the growth of the system had led to a perception that the Ministry was overloaded. It was therefore split in two, with one part having responsibility for 'Basic Education and Culture', which included secondary education both general and vocational/technical, the other taking over post-secondary and higher education. The reversion in the 1990s to a single ministry in charge of all education suggests that the division of labour did not produce the results hoped for.

Nevertheless, the single ministry has devolved the detailed day-to-day running of all basic schools directly to District Education Boards, by-passing the regional and district governments. The latter had performed disappointingly in the past, diverting education budgets to other purposes and siting schools for political advantage rather than educational need.

Financing

Shortfalls in supplies of schools, teachers and materials and the decline in quality were very likely due to the decline in the government's allocations to primary education. 'Moreover, in real terms the expenditure per primary school student fell by 60 per cent between 1970 and 1986 … . The key indicator in this respect is that education's average share of total public expenditure in constant prices has fallen from 14 per cent in the 1970s to eight per cent over the past three years.' (Coombe et al. 1990, p. 11)

The Educational Reform Implementation Programme of 1986 attempted to respond to this and, in the context of structural adjustment, strongly favoured cost-sharing at all levels. It proposed parental payments for teaching materials and for all costs (especially boarding, but not for tuition at the primary and basic levels), the introduction of some form of tuition fees at secondary and tertiary levels, the mobilisation of local authority levies and the encouragement of private and aided schools. 'As from May 1986, all primary and secondary school boarders were to pay fees ... .'

In 1989, a FINNIDA mission observed:

> 'Within the limitations of the adjustment programme, the government's current educational priorities may be stated as:
> [1] to reverse the decline in quality and access to education,
> [2] to shift educational expenditure in favour of primary education, especially among the poorest.' (At that time, the expenditure per university student was 186 times that of a primary school student.)

The outcomes of 'cost-sharing' and the resolutions and priorities noted by the 1989 FINNIDA mission may be gauged from the situation a decade later, when a 1999 National Assessment Survey found instruction in lower primary grades 1–5 reduced from five to three hours daily and its preliminary findings indicated that only 3 per cent of the 1999 Grade 5 pupils had attained the desirable mastery level. In fact, only 26 per cent of these pupils had reached even the minimum mastery levels, doing so poorly indeed as to be functionally illiterate in English.

Retention rates had also declined: of 1000 children enrolling in 1990, only 770 remained until Grade 5 and 683 until Grade 7. The situation was worse for girls: of 1,000 rural girls enrolled in 1990, only 510 remained in Grade 7 in 1996.

It appeared that cost-sharing had neither attracted more resources nor improved quality. On the contrary, it had pushed the goal of UPE further away.

In 2002, the government had made arrangements with the international community that enabled it to reverse the cost-sharing necessitated by structural adjustment and reintroduce free primary education. As a result of this step, the government was able to report that, in 2003, enrolments in primary schools had risen by six per cent, as compared with the two per cent of the three preceding years.

Resurgence

In dramatic contrast with the history of decline and disappointment between 1983 and 2001, the years since 2002 have seen a resurgence of the momentum towards UPE. Tables 4.5 and 4.6 give the statistics and projections reported by the Zambian Ministry of Education[13]. The rate of growth in enrolments over the past six years rivals that of the years immediately following independence in 1964. As would be expected, the urban regions experienced the highest increases in enrolment, with the very rural and sparsely populated North Western and Western provinces responding more slowly.

Table 4.5. Enrolment in Grades 1–9, by gender in Basic Schools from 2000 to 2005, Zambia

Year	2000	2001	2002	2003	2004	2005
Female	864,682	951,377	1,023,327	1,101,949	1,218,611	1,391,988
Male	942,072	1,025,055	1,104,711	1,184,666	1,300,530	1,460,382
Total	**1,806,754**	**1,976,432**	**2,128,038**	**2,286,615**	**2,519,141**	**2,852,370**
% Change		9.4%	7.7%	7.5%	10.2%	13.2%
% Av. Change					8.7%	9.6%

Table 4.6. Enrolment in all schools in Grades 1–9 by gender and province, 2005, Zambia

	Male	Female	% (F)	Total	% of Tot.
Central	163,709	155,430	48.7%	319,139	11.2%
Copperbelt	251,167	257,076	50.6%	508,243	17.8%
Eastern	158,546	149,283	48.5%	307,829	10.8%
Luapula	116,090	104,767	47.4%	220,857	7.7%
Lusaka	162,840	169,167	51.0%	332,007	11.6%
N. Western	93,966	85,482	47.6%	179,448	6.3%
Northern	210,381	185,176	46.8%	395,557	13.9%
Southern	204,783	193,695	48.6%	398,478	14.0%
Western	98,900	91,912	48.2%	190,812	6.7%
National	**1,460,382**	**1,391,988**	**48.8%**	**2,852,370**	**100.0%**

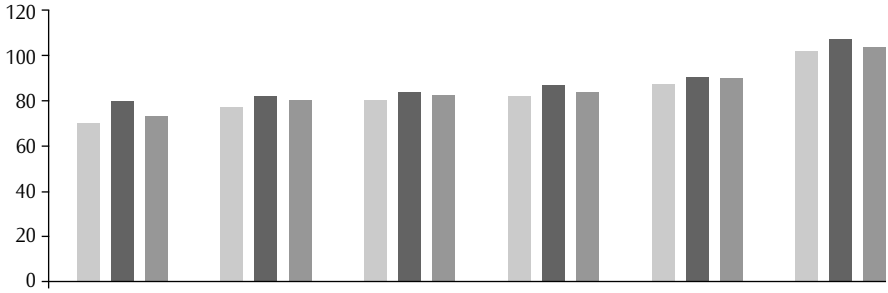
The major policy interventions that removed some of the barriers to education included:

- The abolition of all fees and charges for Grades 1–7, making primary education completely free of direct costs to families.
- Making school uniforms optional and prohibiting the exclusion of pupils who cannot afford uniforms.
- Accepting the validity of alternative modes of education, mainly through recognising community schools and Interactive Radio Instruction Centres.
- The proposed abolition of the Grade 7 examination, which would make entry to Grade 8 almost automatic (but the exam persists and still governs entry to the better secondary schools).
- Permitting the re-admission of pregnant female pupils, who had previously been barred from continuing with their schooling.

The two tables also show that the GPI is also healthy, even though not yet perfect: in 2005 girls made up 48.8 per cent of the enrolments across the country. However, Table 4.6 reveals that rural girls are still worse off than their urban sisters. In the two most urban regions, Copperbelt and Lusaka, girls formed slightly more that fifty per cent of the enrolments, whereas in the rural regions their ratios vary between a low of 46.8 per cent in the Northern and a high of 48.7 per cent in the Central. The facts that the gap has been closed in the towns and is relatively small among rural communities suggest that Zambia was well advanced towards the goal of gender parity by 2005, even if it had not quite reached it.

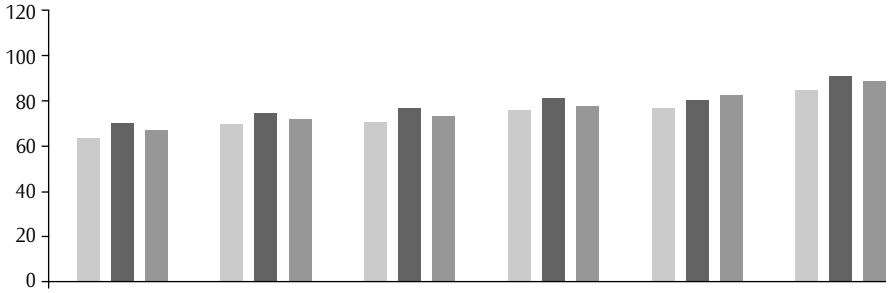
The very large increases in enrolments have of course advanced the GER and NER to the point where in 2005 they regained and even surpassed the levels of 1983. Figure 4.1 reports that the GER for boys and girls are respectively 108.4 and 102.7, with the NER in Figure 4.2 reported as 94.0 and 92.3. If these increases are sustained and if drop out rates between Grades 1 and 7 can be kept low, Zambia should achieve the goal of Universal Primary Completion well before 2015, the year envisioned by the Millennium Development Goals.

Figure 4.1. Gross enrolment ratio in Grades 1–9 by gender and year, Zambia



	2000	2001	2002	2003	2004	2005
Female	71.3	76.5	80.1	84.1	86.4	102.7
Male	79.9	83.4	87.4	91.2	93.23	108.4
Average	75.1	79.9	83.7	87.7	93.1	105.5

Figure 4.2. Net enrolment ratio in Grades 1–9 by gender and year, Zambia



	2000	2001	2002	2003	2004	2005
Female	65.9	70.9	72.2	77.2	78.2	92.3
Male	70.4	75.1	76.8	80.5	80.7	94.0
Average	68.1	73.0	74.8	78.8	82.7	93.5

The improvement of conditions since 2000 led to the 2004 data reporting 45,970 teachers, 47.8 per cent of them female (see Tables 4.7 and 4.8 for their distribution across institutions and provinces). Counter-balancing this positive news, the sharp increases in enrolments caused the teacher-pupil ratio to deteriorate from 1:46 in 2001 to 1:52.7 in 2004. This is attributed to teacher loss and non-recruitment of trained teachers. The capital city, Lusaka, had the most favourable teacher-pupil ratio of 1:47. The rural provinces were less favoured, with the worst off being Northern at 1:77[14].

In 2003 the Ministry of Education published its '*Strategic Plan 2003–2007 and National Implementation Framework'*. The document reconfirms the government's determination to achieve increased and equitable access to quality education at all levels. The measures

Table 4.7. Teachers in Grades 1–9, Zambia, by agency and province

Province	GRZ	Grant Aid	Private	Church	Community school	Total
Central	4,090	81	115	34	315	4,635
Copperbelt	7,525	169	1,110	243	501	9,548
Eastern	3,496	179	80	53	582	4,390
Luapula	2,940	38	21	33	289	3,321
Lusaka	4,694	130	1,238	235	542	6,839
North Western	2,559	73	31	3	171	2,837
Northern	4,183	180	56	87	663	5,169
Southern	4,902	208	209	135	704	6,158
Western	2,803	26	18	50	176	3,073
Total	**37,192**	**1,084**	**2,878**	**873**	**3,943**	**45,970**

Table 4.8. Teachers in Grades 1–9, Zambia, from 2000 to 2005

	2000	2001	2002	2003	2004	2005
Female	17,558	18,258	19,886	20,012	21,955	24,199
Male	19,366	19,535	20,602	21,534	23,806	26,416
Total	**36,924**	**37,793**	**40,488**	**41,546**	**45,761**	**50,615**
% Change		2.4%	7.1%	2.6%	10.1%	10.6%
% Av. Change					5.6%	7.6%

include the abolition of schools fees, support to alternative modes of delivery and the introduction of bursaries to cater for the most vulnerable.

The Ministry proposed to undertake:

- Sensitising communities to the importance of educating girls, women, orphans and the vulnerable;
- Distributing grants to all government and recognised community schools based on unit cost, learner population and equity-based criteria;
- Providing infrastructure and learning materials;
- Providing bursaries for orphans and children with special needs for basic essentials like clothing and weekly boarding facilities for those without adequate home-based care.

The Ministry expected these measures to bring about substantial and sustained increases in enrolment in basic schools and to reduce both the numbers and the percentages of out-of-school children. The data it reported for 2005 suggest that its expectations were realistic.

As part of its new strategy, the Ministry of Education in 2003 moved towards setting up a decentralised system of educational materials procurement. To ensure that educational materials are provided in sufficient quantities and in good time to schools, the Ministry

now involves the private sector in supplying books and other educational materials directly to schools. A list of 'Approved and Recommended Books' for all schools has been circulated to the schools and publishers. The responsibility to purchase the books has been transferred to the schools, which receive termly grants for the purpose. The publishers, book sellers and the Educational Materials Unit have to deal directly with the schools. Gradually, the schools are being re-stocked with the full range of books and other teaching resources.

Clearly, despite the setbacks, the Ministry of Education, with the support of its many external supporters[15] is succeeding in regaining momentum towards UPE of good quality. In sum, despite nearly 20 years of disappointing progress and frustration, Zambia is on track towards the achievement of Universal Primary Education, possibly even before 2015, the target date of the Millennium Development Goals.

The following sections consider the range of factors that contributed to the trough of disappointment in the nearly 20 years following 1983.

Social factors

This section considers the social factors that may have supported or hindered Zambia's drive for UPE. They include the demand by parents and children for schooling, their views on the purposes and uses of schooling, their expectations of what constituted a sound schooling, parents' reasons for withdrawing their children from school or agreeing to their leaving before the completion of the primary course, and children's reasons for dropping out from primary school.

Population distribution

As the first section noted, an important factor that affected social views on schooling is the distribution of Zambia's rural population. Prior to independence it was very thinly spread in relatively small settlements across a large area. Most people made their livings through subsistence agriculture, using the slash-and-burn approach, which meant that villages would move their sites from time to time. Siting schools to serve sufficiently large and stable groupings of people was difficult, which meant that for many people distances from schools were relatively great.

Since 1964 the population has trebled and the rapid rate of urbanisation has brought nearly half the people – 44 per cent – into towns. This latter fact has both facilitated access to and efficiency in the use of schools and simultaneously put the government under huge pressure to provide urban schools. Double and even triple shifts have been introduced and persisted with the effort to afford every child an education. The problem for education in the towns then is not one of demand, but of supply. The problem in rural areas is more ambiguous: parents do want schools for their children, but where the population is scattered, the children locally available may not be sufficient to fill the four grades of a lower basic school.

Ways of life

In some countries, the ways of life of some population groups have made it difficult to provide schooling for their children. Nomadic pastoralists and itinerant fishers are among the better known examples. Zambia had and has no such groupings. Neither does it have desert or especially mountainous regions that resist human settlement. Despite shifting agriculture and scattered patterns of settlement, the population was relatively immobile and increasingly open to the principle of sending their children to school. However, particularly among rural groups, concerns about the safety of daughters, tendencies to use children for domestic labour or to send boys to protracted circumcision and initiation rites were factors that militated against regular attendance and transiting to higher grades in more distant schools. Also, the preference of some communities – particularly in the rural Eastern, Central and Southern provinces – to marry off their girls at an early age, as they attracted a higher dowry and to avoid the danger of pregnancies outside wedlock contributed to dropout[16]. In effect, initial demand is strong, but other priorities can affect the attendance and perseverance of minorities of pupils.

Religion

Similarly, in some countries, religious beliefs have been a factor in a people's reluctance to send their children to what were seen as proselytising Christian or simply alien schools. This was not a factor in Zambia, where none of the numerous ethnic groups of Zambia held beliefs that were antagonistic to schooling, Christian or secular.

Gender disparities

Although gender disparity has been a feature of primary education in Zambia, it is clear that it has never been as severe as experienced in some other countries. At independence, girls already comprised 43 per cent of primary school enrolments, a GPI of 0.75. The first section showed, however, that in new enrolments in primary/basic education and in transitions to secondary education gender parity has been achieved and even exceeded. In other words, there have been no ingrained or institutional forms of resistance to schooling girls, although there have indeed been socio-economic and institutional factors that have hindered their perseverance to the completion of courses.

Dependency on government

Until 1964, rural communities were called upon to build and maintain classrooms and teachers' houses, if they wished the government to open a lower primary school (Grades 1 to 4) for their children. Then, for more than 20 years, the government accepted full responsibility for supplying schools and teachers. Although the people may well have become more dependent on government for primary schools, the emergence of Community Schools in great numbers since the 1980s suggests that such dependency as exists is not absolute.

Schooling only as a means of access to wage/salary employment

It is sometimes suggested that demand for and perseverance in primary school would have been stronger, if Zambia had experienced better economic growth and a more rapid expansion of waged and salaried employment. Assessing the precise force of such a suggestion is impossible without data from appropriate studies. However, perhaps the most powerful evidence of the relative unimportance of the link between primary education and the wage/salary employment market is the steady growth of school enrolments contrasted with the failure of the market to grow: indeed it shrank drastically as a proportion of the labour force, as Section 1 documented: whereas primary enrolments almost quadrupled between 1964 and 2002, the number of waged and salaried jobs virtually stagnated. If the demand for salaried jobs and the demand for education were highly correlated, a similar stagnation in enrolments would have followed, possibly after some time lag. Further, the leaps in enrolments that have occurred since 2000 have not been matched by similar leaps in the numbers of available jobs. The inference is that the demand for primary/basic education could now be quite independent of the demand for waged and salaried employment.

Kelly provides perhaps the best summing up of public attitudes to education:

> 'Despite the best efforts of teachers, supervisors and administrators, the quality of the education provided declined … . Nevertheless, public confidence in education as an instrument of development remained high. Even the most indigent people did not question the need to make substantial sacrifices so that their children could have a school education. They willingly paid for school supplies, additional school facilities, and heavily school-related expenses (such as uniforms). As the economic situation worsened, people's faith in the ability of education to deliver them and their children from the oppression of poverty increased. As wage employment became scarcer, people attached greater store to educational credentials as the necessary, if not always sufficient, passport to such employment.' (Kelly, M.J. 1991. p. xi)

'Relevance'

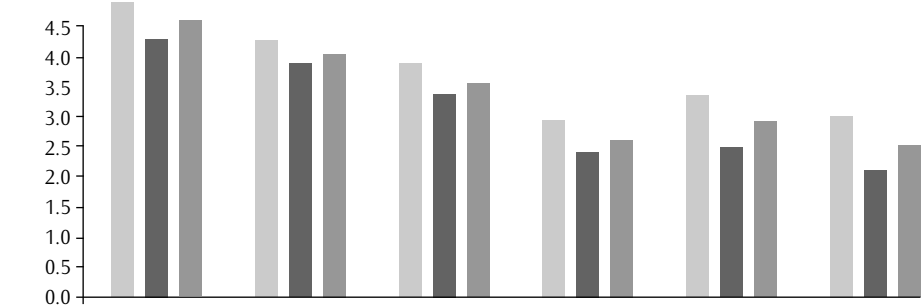
There was an argument that one of the factors that promoted drop-out was the irrelevance of the primary school curriculum. The failures of proposals in 1976 for a more practically oriented curriculum, of the Production Units to affect the taught curriculum and of a 20-year Practical Studies programme all suggest that for the Zambian public in general 'relevance' was not an important issue.

Drop-out

Rates of drop-out can at least in part reflect dissatisfaction with education. At least in this respect the basic schools of Zambia appear to satisfy the vast majority of their pupils. Figure 4.3 shows the statistics reported on drop out from the full basic course of Grades 1 through 9 for the years 2000–05. Even in 2000, the rate was small in comparison with other countries – no more than five per cent for the girls and just over four per cent for the

boys. By 2005, the rates were reported to have declined to just three per cent for the girls and two per cent for the boys.

Figure 4.3. Drop-out rates in Grades 1–9 by gender and year, Zambia



	2000	2001	2002	2003	2004	2005
Female	4.9	4.3	3.9	2.9	3.4	3.0
Male	4.3	3.9	3.4	2.4	2.5	2.1
Average	4.6	4.1	3.6	2.6	2.9	2.5

HIV/AIDS

HIV/AIDS is estimated by now to have infected 15.6 per cent of those aged 15–49 (23.1 per cent in urban areas and 10.8 per cent in rural). However, the pandemic cannot be blamed for the disappointment of not achieving UPE in the 1980s. It had not taken hold by then and the education system had in any case been experiencing difficulty previously. Also, the reported leap in primary/basic enrolments since the removal of all direct financial barriers to schooling in 2002 underlines the relative unimportance of the disease as far as enrolment and perseverance are concerned.

That said, its likely impact on the quality and effectiveness of education cannot be discounted. Frequent and prolonged absences by teachers – and even deaths[17] – on the one hand, and on the other, absences by pupils who need to look after sick parents or orphaned siblings reduce contact hours and learning.

Conclusion

The information available suggests that no unambiguously social factor – as distinct from economic or political factors – contributed to the failure of primary school enrolments to keep pace with population growth between 1983 and 2000. The enrolments have continued to mount steadily over the 43 years since independence and have leapt upward during the past five years. The data provided in the preceding chapters make it very clear that most of the parents of Zambia, urban and rural, have wanted and still want their children to be educated in school.

Economic factors

Zambia entered independence with reserves of foreign exchange – some £400 million – that represented nearly 20 years of annual recurrent expenditure under the colonial regime. Between 1964 and 1974 the economy was buoyant and expanding. A sharp increase in the world price for copper in 1967 enabled the government to levy an addi-

tional 100 per cent windfall tax on the copper companies and emboldened it to nationalise them in 1969. It was able to sustain its investments in all levels of education and to continue its work on improving the infrastructure for water, roads, transport and communications. The rate of economic growth might have been even greater but for the difficulties and sharply increased costs caused by the unilateral declaration of independence by Southern Rhodesia in 1965[18].

However, the oil crises of 1973 and 1979 and the consequent long contraction of the world economy brought the price of copper down drastically, so that the government's tax revenues began shrinking. Worse, the actual output of copper also began to decline, shrinking revenues further. The government's efforts to make the agricultural sector more productive and to diversify the rest of the economy made disappointing headway, so that the government soon found that it was spending much more than its income. Indeed, 'By 1976, the country was being rocked by economic and financial crises unparalleled in its history.' (Carmody, p. 38)

In its drive to accelerate development, the government had augmented its own resources by borrowing heavily against future revenues from copper and the returns to its new investments. It reckoned that, as in the past, the slide in the price of copper would be short-lived and that there would be a return to prosperity. On the contrary, 'Zambia's economic decline has been persistent. Despite several stabilization packages in the 1970s and structural adjustment programmes in the 1980s, real growth has been negative on average since 1973. GDP per capita at constant 1977 prices plunged from K439 in 1974 to K313 in 1984 and K287 in 1987.' (Coombe et al. 1990, p. 1) Both rural and urban incomes fell by 50 per cent as agriculture stagnated, waged/salaried employment declined from 23.9 to 9.8 per cent of the work force and the wages on offer shrank in real terms 'in the formal sector ... real average annual cash earnings in 1988 (excluding fringe benefits) had plunged to 15 per cent of their 1980 level. Proportionately the highly skilled groups have lost most.' (Coombe et al. 1990, p. 5) Between 1987 and 1991, the work force grew by more than 11 per cent, whereas total wage employment increased by just over three per cent. By 2002, per capita income had declined from US$752 in 1965 to US$351, a fall of 50 per cent. In that year, the proportion of people living in absolute poverty stood at over 70 per cent, while the revenue base of government expenditure had fallen from 30 per cent of the national product in the 1960s to less than 20 per cent in the 1990s.

Table 4.9. Inflation in Zambia, 1986–94

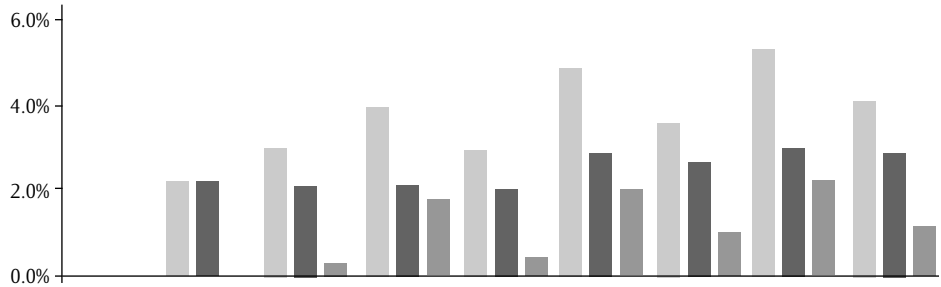
Year	Inflation %
1986	35.0
1988	64.0
1989	154.3
1990	124.3
1993	200.0
1994	27.3

The government's 'deficits have been financed by foreign borrowing which has made Zambia the most indebted country in the world relative to GDP per capita'. (Coombe et al. 1990, p. 3). They also generated galloping inflation, as Table 4.9 shows.

The resultant rural and urban poverty, aggravated by the HIV/AIDS pandemic, has left the country with a life expectancy now estimated at 33 years – compared with 54 years at the end of the 1980s.

The stagnation in Zambia's economy began to be reversed in 1999. In the years since then, the national income per capita has attained modest increases of approximately 1.4 per cent annually. In 2001, Zambia began to receive debt relief under the Highly Indebted Poor Countries Initiative (HIPC) to the extent of 6 per cent of the total approved budget. Under this initiative, the money for debt servicing was shifted to the social sectors, i.e. education and health. In 2005, the government satisfied the conditions for debt relief under the HIPC initiative and had much of its debt cancelled. Although it is still too soon to assess the long term effects on the education system, the rapid response of enrolments to the new expenditures and the removal of all direct costs are very encouraging.

Figure 4.4. Education allocation as a percentage of the GDP, Zambia



	1998 Actual	1999 Actual	2000 Original	2000 Actual	2001 Original	2001 Actual	2002 Original	2002 Estimated
MoE – Total ind. aid	2.3%	2.7%	3.8%	2.8%	4.7%	3.7%	5.3%	4.1%
MoE – Domestic	2.3%	2.1%	2.1%	2.0%	2.8%	2.6%	3.0%	2.9%
MoE – External aid	0.0%	0.6%	1.7%	0.8%	1.9%	1.1%	2.2%	1.2%

On the other hand, it is clear that the economic reverses and apparent mismanagement that the country suffered over that quarter of a century were bound to hinder the government's drive for UPE. Indeed, even in 2002, the government could not engage a number of new primary teachers to replace those who were about to retire, as it was unable to pay the retirement benefits of the latter. To pull the government out of its predicament, the government of the Netherlands offered a grant to pay off the retirees. The wonder is that enrolments in primary and secondary schools kept growing at all.

It seems clear that the economic factor of plain and deepening poverty explains why many parents could not send their children to school or continue to keep them there; and that the economic factors of falling revenues and mounting debt explain at least part of the government's failure to sustain the drive for UPE.

Political factors

Between 1964 and 1974, the early years were years of plenty – the government honoured its pledge to achieve UPE. However, when economic conditions turned and remained adverse, the competition between priorities became harder for the government to resolve and the social services, including primary and secondary education, tended to lose out. As late as 2001, the budget allocation to education in Zambia remained the low-

est in the Southern African sub-region. Although a good deal better than the eight per cent of 1990 at just over 20 per cent of the total disposable budget, it compared poorly with the 25–30 per cent in neighbouring countries.

Armed conflict

The country was blessed with relative stability in terms of political rivalries and struggles for power and never suffered a military coup. On the other hand, Zambia shares borders with no fewer than eight other countries and at different periods there were instability and armed conflict on five of them – Mozambique, Zimbabwe (Rhodesia), Namibia, Angola, and Congo (Zaire). Indeed, severe trouble began in 1965, when the Unilateral Declaration of Independence by the Smith regime in Southern Rhodesia severed Zambia's routes to the sea. Additionally, in the struggle against apartheid South Africa, Zambia was a front-line state. The military and other security forces naturally took and retained a high priority for financial resources and were in a position to insist on it.

Socialism

Second, the government had chosen a one-party, socialistic path to development. That entailed state control over the productive sectors. This led not only to a large civil service and largely loss-making state corporations, but also to substantial subventions to the organs of the ruling party. The government's interest required that it maintain the levels of employment in these bodies, if necessary at the expense of other services.

Inappropriate decentralisation

Third, the government followed a pattern of decentralising decision-making that placed a good deal of discretion in the hands of local political offices. Inadequate safeguards against abuse led to a situation where 'Party functionaries were given sinecures at all levels of state operations and the total cost of financing such activities was more than the budgetary allocation by Parliament to education and health combined. Indeed, money allocated to education and health by Parliament was largely diverted to party functions by provincial accounting units. This led to a very rapid deterioration of the education services'. (Carmody, 2004, p. 37)

High level manpower

Fourth, in 1964, Zambia had only 104 Zambian university graduates. Therefore, the government gave a very high priority to the development of what was termed 'high level manpower'. Pre-eminent among the institutions charged with producing this manpower was the University of Zambia, which opened only in 1966. From its early days, its students attracted privileged treatment. This treatment helps explain why, as late as 1999, primary school teacher starting salaries of $660 per year were less than the meals allowance for university students and, on top of that, 25 per cent below the government's official poverty line for two adults and four children.

Kelly had this to say: 'Within the education sector, political decisions tended to divert resources away from the primary, secondary, teacher training and technical education levels and toward the university. Unit costs at the primary level fell by over 25 per cent and by over 50 per cent at the secondary level, but at the university they rose by more than 40 per cent. ... in the allocation of resources between educational levels, and within each level, between functions, too much was devoted to the refined needs of too few at the higher level, and too little to the general needs of too many at the lower level.' (Kelly, M.J. 1991, p. xiv)

In 1989, the expenditure per university student was 186 times that of a primary school student. Ten years later in 1999, the Basic Education Sub-Sector Investment Project (BESSIP) noted that in terms of unit costs, one university student was still absorbing on average the equivalent of the resources for 127 primary school pupils. (See Table 4.10)

Table 4.10. Percentage change in unit expenditures, Zambia, 1975–84

Level	1975–79 to 1980–84
Primary	−19.9
Secondary	−25.7
Teacher Trg	−13.8
Tech. Ed.	−13.9
University of Zambia	+21.3

Source: Kelly, M.J. (1988)

Lack of champions

An institutional factor that may have facilitated the relegation of primary and secondary education in the priorities of the government was the President's custom of rotating ministers and civil service heads frequently. The practice certainly prevented the build up of expertise in the Ministry of Education. It had the additional effect of slowing the formation of an informed body of influential practitioners who could lobby effectively to maintain the priority of primary education and UPE in the allocation of resources. Local civil society and community organisations were too thin on the ground to act as an effective counter-weight to the government's distraction from UPE.

International dimensions

As noted earlier, UNESCO's Addis Ababa educational conference of 1961 promised education for all African children by 1980. It based the promise on the understanding that virtually all the governments of Africa would be able to rely on international help. Zambia was no exception, for ever since independence its education system has used funds and expertise from a range of external sources, bilateral and multilateral, in efforts to expand and to improve its quality at all levels. Examples have been mentioned in previous chapters. However, the external assistance did not prove as generous as UNESCO and the conference might have hoped. As the British Chancellor of the Exchequer, Gordon Brown, said in December 2004 to the American Council on Foreign Relations in New York:

'Recall the past promises:

- the promise in 1970 that all developed countries would set aside 0.7 per cent of their national income for development aid;
- the promise of primary education for all made in 1990 in Jomtien (Thailand) and re-affirmed in 2000 in Dakar (Senegal);
- the promises at the World Summit for social development in 1995 on eliminating poverty.

Promises which all have one thing in common – they have all been broken.'

For Zambia, one consequence of the under-fulfilled promises was that protracted economic difficulties forced the government into relying much more heavily on borrowing from the IMF than it had intended. Unfortunately, mismanagement led to the unsuccessful stabilisation programmes of the 1970s and the structural adjustment programmes of the 1980s. Coombe and his team observed in 1990, 'Adjustment failed for many reasons; contradictory demand management instead of direct stimulation of production and investment, over-optimistic forecasts of copper prices and production volumes, the inability of the Zambian Government to meet its declared commitments, inflexible labour markets, and the low priority accorded to the social sectors in programme design'. (Coombe et al. 1990, p. 1)

The documentation indicates that the international financiers were as interested in promoting primary/basic education and in reducing poverty as the government declared itself to be. There is, of course, the probability that the measures required by the financiers, especially the push for cost-sharing, underestimated the impact of sheer poverty and were inappropriate for Zambian conditions. Unfortunately, the hypothesis cannot be fully tested, as the earlier pattern of inconsistent implementation continued even with a change of government in 1991, when the worsening economic situation prompted a second attempt at structural adjustment. That was again inconsistently applied and had little effect.

Only in 1999, and again with much advice and financial help from the international community, did the economy begin a recovery that appears to have taken hold. As noted earlier, economic growth was been steady, if modest, over the six years up to 2007, at between four and five per cent per annum. On a per capita basis, that is approximately 1.4 per cent per annum. As also noted, the government has been able to satisfy the conditions of the HIPC, which has relieved it of a substantial burden of debt repayments and which has insisted that it spend the extra funds now at its disposal on the social sectors of health and education.

Inferences, conclusions and lessons

The broad conclusion must be that political decisions forced partly by economic factors, partly by economic policies, partly by inconsistency, partly by forms of corruption and partly by armed conflict in neighbouring countries largely explain Zambia's failure to attain UPE. As long as the money was available, the government was willing to allocate it

to building schools and supplying teachers and teaching materials. It was also willing to agree that debt relief should be allocated totally to education and health. However, when money was scarce, other priorities took precedence both in central government and in the decentralised agencies of the regions.

Economic growth

Therefore, a first lesson seems to be that governments need to maintain economic stability and promote at least enough economic and purchasing power growth to keep pace with population growth. In Zambia's case, the halving of the population growth rate from 3.4 per cent in 1964 to the current 1.7 per cent should help make economic betterment more sustainable. Economic growth must enable the government to pay public servants wages that are above the poverty line.

Advocacy

A second lesson seems to be that the education sector needs a very strong corps of advocates to prop up political will in maintaining the priority of primary education. Frequently rotating ministers of education and the civil service heads of ministries of education is unlikely to enable the formation of such a corps.

A country's political and administrative cadre are likely to have a strong interest in maintaining the university sector, even at the expense of secondary and primary education. A corps of advocates for primary schooling is needed to resist this bias and to insist on a holistic view of a properly balanced education system.

Accountable decentralisation

Part of this lesson is that one precondition for sound decentralisation must be effective accountability. In this regard, a recent World Bank study of targeted subsidies found that, where there was strong direction, there was 100 per cent delivery of the subsidies to their target populations. In contrast, where decentralised agencies were allowed some discretion, target populations actually received only 40 per cent of their entitlement. Effective systems of monitoring and accountability must be in place.

Strong demand

Third, in a society like Zambia's, there will be no lack of parental demand for schools – on the contrary. It is striking that, although about 70 per cent of Zambia's population lives below the absolute poverty line of $1.00 per day, the schools are full and rates of attendance and transition high. However, poverty does inhibit participation: the 6–7 per cent surge in primary enrolments following the abolition of fees and other charges in 2002 stemmed from the children of poor and rural families. It may indeed be the case that a minority of parents and children, 'the last ten per cent', will ignore, reject or be unable to take up opportunities even of free schooling, but this will not be true of the overwhelming majority.

Community support and partnerships

On the contrary, in most communities local leaders will always be ready to make an effort to mobilise finance, labour or other resources to ensure at least some educational opportunity for their children. The spontaneous appearance and rapid expansion of Zambia's community schools attest to this. It may be then that the fourth lesson is that governments should refrain from shouldering complete responsibility for the provision of schools, but should instead examine how parents and their communities, both urban and rural, can be encouraged to participate in ensuring that enough schools and classrooms exist for all the children, but always without raising barriers for the poorer groups.

Notes

1 The Net Enrolment Ratios were of course rather lower, running in the 70s and 80s for both females and males in 1983. The discrepancy between the GER and NER in 2002 was rather smaller than in 1983.
2 HIPC – Highly Indebted Poor Countries.
3 Historically, Grades 1–4 constituted 'lower primary', Grades 5–7 were 'upper primary', while Grades 8 and 9 constituted 'Junior Secondary'. The change of terminology reflects the long held aim of affording nine years of basic education to every child.
4 The actual number is thought to be slightly more than 3,000.
5 For instance, the provision of books in English for basic schools went up from 947,988 in 2003 to 1,323,118 in 2004, an increase of approximately 40 per cent.
6 However, parents were expected to provide uniforms for their children and, where they lived far from a school, to furnish their children with food and cooking utensils. Also, communities and their local governments – mostly tribal 'Native Authorities' in the rural areas and municipalities in the urban- were expected to provide the buildings, many of them 'pole-and-dagga' or sticks, mud plaster and thatch.
7 The grades of Sub-A and Sub-B were abolished, while the full primary course was extended to seven years. Lower primary then comprised four years or grades and upper primary three.
8 Schools for European and mixed-race children had been separate before the formation of the Central African Federation in 1953 and, until the demise of the Federation in 1963, had been the responsibility of the federal government –and much more generously funded. At independence in 1964 they came under Zambian government control.
9 BRAC – Bangladesh Rural Advancement Committee.
10 On the other hand, the Census reckoned that only 42 per cent of Grade 1 places were occupied by seven year olds, and only 59-62 per cent of the seven year age group were in school at all. In effect, the disparity between the Gross Enrolment and Net Enrolment Ratios was wide. Of course, this in no way detracts from the magnitude and success of the Ministry's drive to provide the schools and classrooms. On the contrary, it simply illustrates the pervasive, powerful and determined demand for education on the part of young people who had lost out under the colonial regime.
11 1979. The Effect of Population Growth on the Development and Cost of First Level Education in Zambia. A.N. Mehra – Lusaka. Manpower Research Unit. Institute for African Studies. University of Zambia. Report no. 4, Table 2
12 As it turned out, even that modification in target proved too optimistic: in 2001, the total enrolment of 1,774,909 pupils in Grades 1–7 turned out to be a GER of 84 per cent, with the NER at 68 per cent, i.e. 12 per cent behind the modified target.
13 It is notable that the Zambia Ministry of Education has been able to report the statistics for 2005 so swiftly. In the 1980s and 1990s, the public might have to wait for up to five years for this kind of information.

14 The situation might have been better, if the government had not decided in 2002 to use its budgetary leeway to increase the emoluments of existing public servants, rather than hire 5,000 newly graduated basic school teachers.
15 Zambia's education system received help from the governments of Denmark, Finland, Ireland, Japan, the Netherlands, Norway, Sweden, UK and USA (the Netherlands and Ireland currently lead the donor consortium for education) as well as UNESCO, UNICEF, the World Bank and many NGOs.
16 The Ministry of Education reported that in 2005 1,405 girls in urban basic schools and 7,706 girls in rural basic schools had to suspend their education because of pregnancy.
17 Whereas 457 teachers in government basic schools died during 2002, as many as 787 did so in 2005 (53 per cent men, 47 per cent women).
18 For more than 15 years, Zambia had its traditional supply routes of fuel and other supplies cut off, so that imports had to come more expensively by air or at considerable delay via Tanzania on relatively poor roads. Eventually, the new TanZam railway, built by the Chinese and completed in1975, helped to offset the loss of the rail-link through Zimbabwe and South Africa.